

## Phase 9: Reporting, Dashboards & Security Review

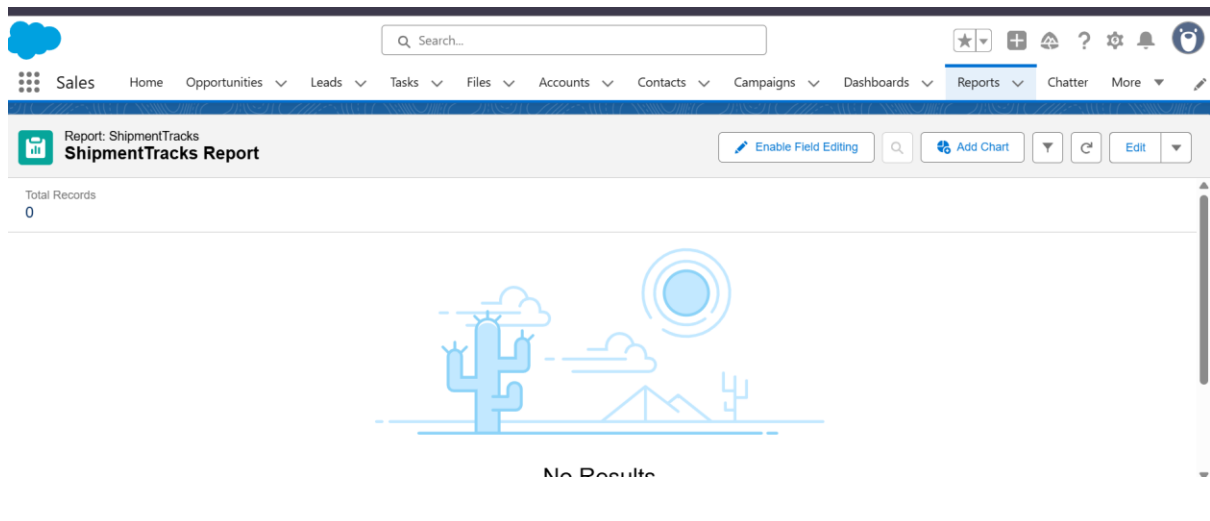
This phase focuses on analyzing data with reports & dashboards and ensuring secure access control through Salesforce's layered security model.

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### 1. Reports (Tabular, Summary, Matrix, Joined)

Purpose: To analyze and present data.

1. Go to Reports → New Report.
2. Select object (shipment tracks)
3. Choose report format
4. Add filters, groupings, and fields.
5. Save & Run.



### 2. Report Types

Purpose: Define which objects and fields are available in a report.

Steps:

1. Setup → Report Types → New Custom Report Type.
2. Primary Object = Shipment\_\_c.
3. Add related object.
4. Deploy for use.

The screenshot shows the Salesforce Setup interface. On the left is a navigation menu with options like 'Setup Home', 'Salesforce Go', 'Service Setup Assistant', etc. The main content area displays details for a report named 'Shipments\_Report'. Below this, a 'Fields' table lists source objects and their included fields.

Source Object	Included Fields
Shipments	18
ShipmentItems	7
Duplicate Record Ite...	7

To the right of the fields table is a Venn diagram with three overlapping circles labeled A, B, and C. Below the diagram is a small table with columns A, B, and C, each containing several rows of data.

### 3. Dashboards

Purpose: Visual display of reports for KPIs.

Steps:

1. Go to Dashboards → New Dashboard.
2. Add components (charts, tables, metrics).
3. Link each component to a report.
4. Save & refresh.

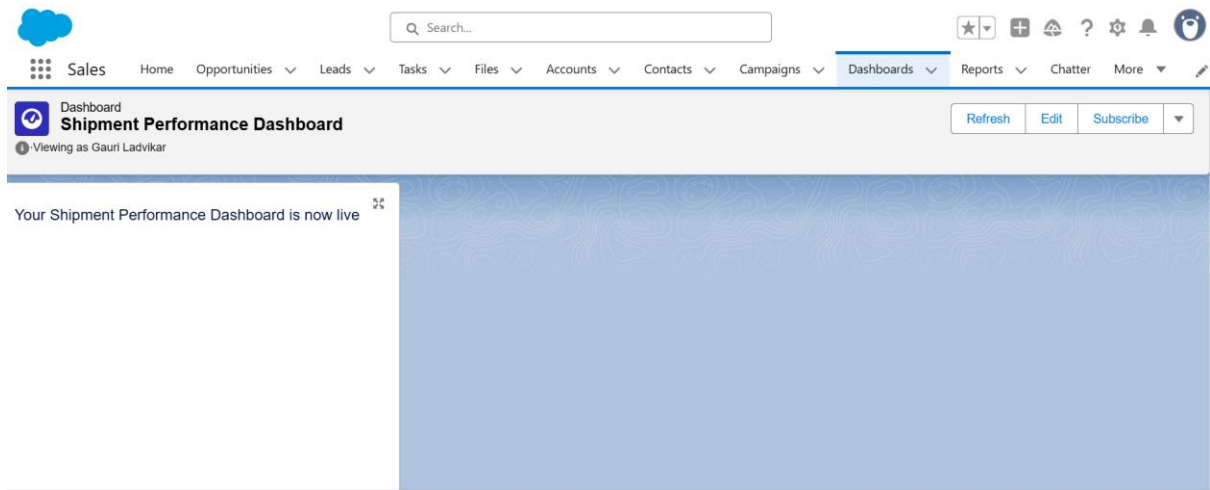
The screenshot shows the Salesforce Dashboards page. At the top, there's a navigation bar with tabs for 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Chatter', and 'More'. Below this, the 'Shipment Performance Dashboard' is displayed. The dashboard area is currently empty, showing a grid of light blue squares. On the right side of the dashboard, there are buttons for '+ Widget', '+ Filter', and 'Save', along with a 'Done' button.

### 4. Dynamic Dashboards

Purpose: Dashboard shows data as per the logged-in user's access.

Steps:

1. Edit Dashboard → View Dashboard As → "Run as Logged-in User".
2. Save & Share.  
Use Case: Logistics Manager sees all shipments, while Agent sees only their own.



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## 5. Profiles

Purpose: Define what users can do in Salesforce (object-level & system permissions).

Steps:

1. Setup → Profiles.
2. Clone Standard Profile.
3. Assign object permissions.
4. Assign profile to users.

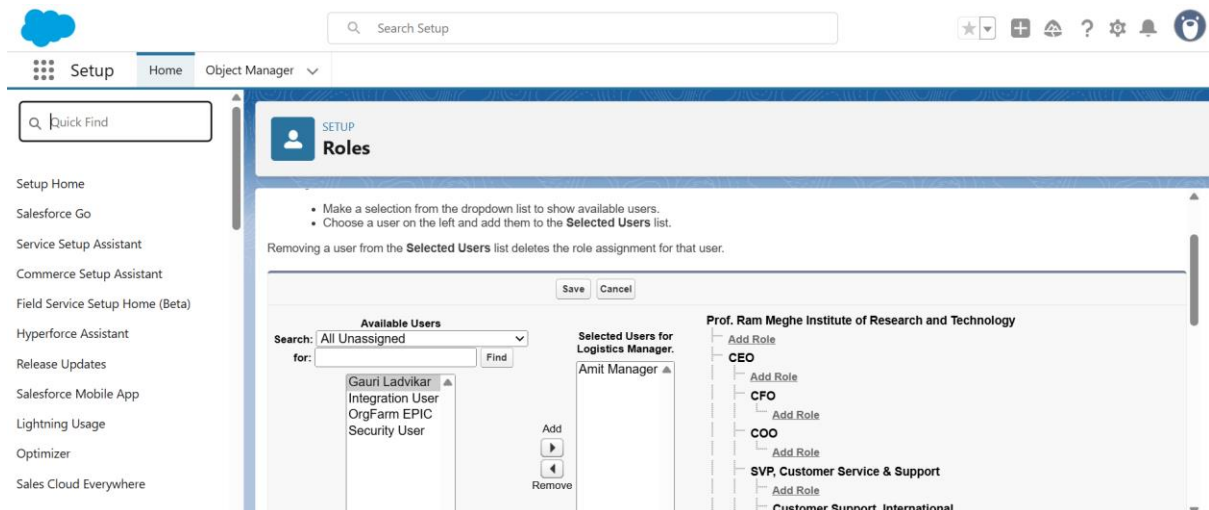
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## 6. Roles

Purpose: Define data visibility in hierarchy (who can see whose records).

Steps:

1. Setup → Roles → Set Up Roles.
2. Create Role = Logistics Manager.
3. Assign users under roles.



## 7. Users

Steps:

1. Setup → Users → New User.
2. Fill details (Name, Email, Username).
3. Assign Role + Profile.
4. Save & send login email.

## 8. Permission Sets

Purpose: Give extra permissions to users without changing their profile.

Steps:

1. Setup → Permission Sets → New.
2. Add object/field permissions.
3. Assign to specific users.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a 'Quick Find' search bar and a list of setup categories: Setup Home, Salesforce Go, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, and ADMINISTRATION. The main content area is titled 'Shipment Tracking Extra Access' and shows 'Current Assignments'. A table lists the assignment for Jane Grey, who is active and has the role of Logistics Manager. The table has columns for Full Name, Active, Role, Profile, User License, and Expires On. An 'Add Assignment' button is visible in the top right of the table.

Full Name ↑	Active	Role	Profile	User License	Expires On
Jane Grey	✓	Logistics Manager.	Standard Platform User	Salesforce Platform	

## 9. OWD (Organization-Wide Defaults)

Purpose: Set baseline record access.

Steps:

1. Setup → Sharing Settings → OWD.
2. Example:
  - Shipment\_\_c = Private.
  - Customer\_\_c = Controlled by Parent.
3. Save.

The screenshot shows the Salesforce Setup interface for Sharing Settings. The left sidebar is the same as the previous screenshot. The main content area is titled 'Sharing Settings' and displays a table of sharing settings for various objects. The table has columns for the object name, the sharing model (e.g., Private, Public Read/Write), and a checkbox for 'Controlled by Parent'. The 'Shipment' object is highlighted in blue.

Object	Sharing Model	Controlled by Parent
Service Appointment Attendee	Private	✓
Service Contract	Private	✓
Service Resource	Public Read/Write	✓
Service Territory	Public Read/Write	✓
Shift	Private	✓
Shipment	Private	✓
Shipping Carrier	Public Read Only	✓
Shipping Carrier Method	Public Read Only	✓
Shipping Configuration Set	Public Read Only	✓
Streaming Channel	Public Read/Write	✓
Tableau Host Mapping	Public Read Only	✓
User Presence	Public Read Only	✓
User Provisioning Request	Private	✓
Waitlist	Private	✓

The screenshot shows the Salesforce Setup interface. On the left is a navigation menu with options like Setup Home, Salesforce Go, Service Setup Assistant, etc. The main content area is titled 'Sharing Settings' and contains a table with the following data:

Object	Sharing Model	Controlled By	Access Level
Communication Subscription Consent	Private	Private	✓
Consumption Schedule	Public Read Only	Private	✓
Contact Point Address	Controlled by Parent	Controlled by Parent	✓
Contact Point Consent	Private	Private	✓
Contact Point Email	Controlled by Parent	Controlled by Parent	✓
Contact Point Phone	Controlled by Parent	Controlled by Parent	✓
Contact Point Type Consent	Private	Private	✓
Contact Request	Public Read/Write	Private	✓
Coupon	Private	Private	✓
Credit Memo	Public Read/Write	Private	✓
Customer	Private	Private	✓
Data Action Job Summary	Private	Private	✓
Data Action Target	Private	Private	✓
Data Communication Caping Activation Target	Private	Private	✓

## 10. Sharing Rules

Purpose: Open access for groups of users beyond OWD.

Steps:

1. Setup → Sharing Settings → New Sharing Rule.
2. Select Object = Shipment\_\_c.
3. Criteria: Region = West → Share with Role: West Manager.
4. Save.

The screenshot shows the 'Shipment Sharing Rules' configuration page in Salesforce Setup. It includes a 'Sharing Rules' section with a table for 'Shipment Sharing Rules' and a 'Sharing Overrides' section with a table for 'Profiles That Override Shipment Sharing'.

**Shipment Sharing Rules**

Action	Criteria	Shared With	Access Level
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in <a href="#">Role: Logistics Manager</a>	<a href="#">Role: Warehouse Staff</a>	Read/Write

**Sharing Overrides**

Profiles That Override Shipment Sharing

Profile	Custom Profile	Organization-Wide Permissions		Shipment Permissions	
		View All Data	Modify All Data	View All Records	Modify All Records
<a href="#">Analytics Cloud Integration User</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<a href="#">Analytics Cloud Security User</a>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## 11. Sharing Settings

- Used to configure OWD, Sharing Rules, and Manual Sharing.
- Defines how records are shared across org.

## **12. Field Level Security (FLS)**

Purpose: Control visibility of individual fields.

Steps:

1. Setup → Object Manager → Shipment\_\_c → Fields.
  2. Click Field → Set Field-Level Security.
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## **13. Session Settings**

Purpose: Configure login/session policies.

Steps:

1. Setup → Session Settings.
  2. Enable session timeout.
  3. Restrict concurrent logins.
  4. Enable forced logout after inactivity.
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## **14. Login IP Ranges**

Purpose: Restrict logins to trusted IP ranges.

Steps:

1. Setup → Profiles → Select Profile.
  2. Set Login IP Ranges (e.g., office network).
  3. Save.
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## **15. Audit Trail**

Purpose: Track configuration changes.

Steps:

1. Setup → View Setup Audit Trail.
2. Review last 6 months of changes.
3. Export for compliance if needed.