

Phase 9: Reporting, Dashboards & Security Review

Analyze data and ensure proper access controls while creating insightful reports and dashboards.

Reports (Tabular, Summary, Matrix, Joined)

Different formats to display Salesforce data in customizable views for analysis.

Report Types

Define which objects and fields are available for creating reports.

Dashboards

Visual representation of key metrics and reports for better decision-making.

Dynamic Dashboards

Dashboards that display data according to the logged-in user's access level.

Sharing Settings

Control record-level access for users and groups in Salesforce.

Field Level Security

Set visibility and edit permissions for individual fields across profiles and users.

Result of Phase 9:

Comprehensive reports and dashboards provide actionable insights tailored to user access levels.

Security settings, including sharing rules and field-level permissions, ensure data protection and controlled visibility.