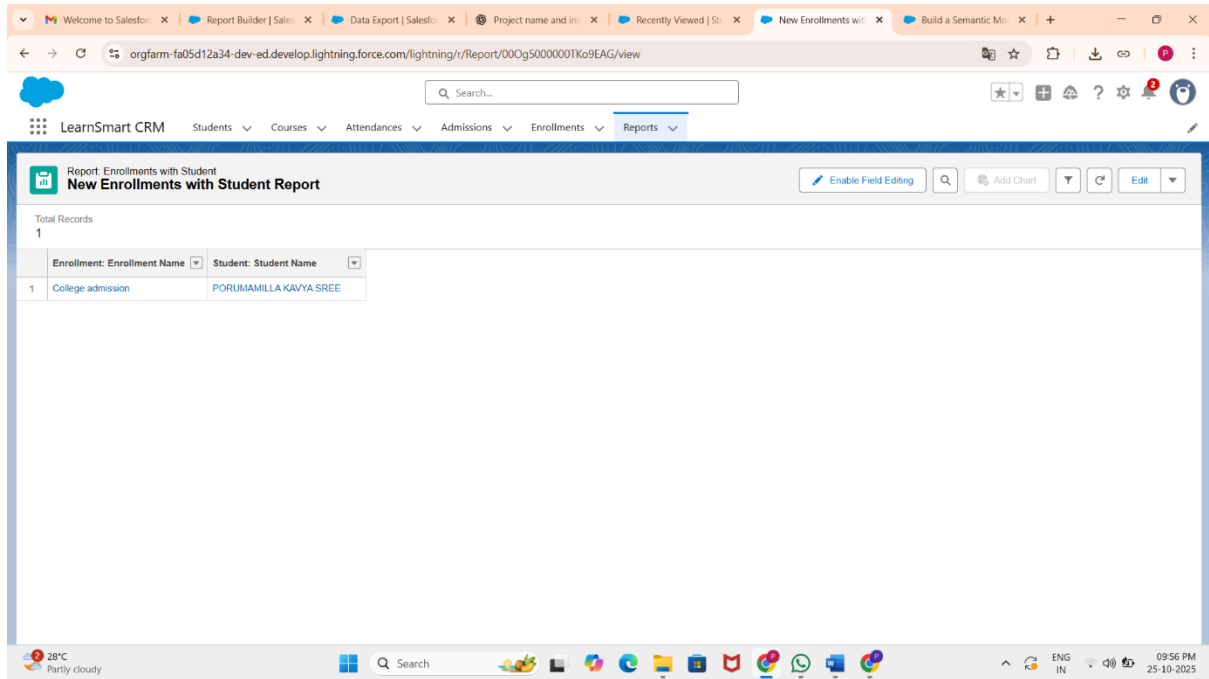


Phase 9: Reporting, Dashboards & Security Review

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.

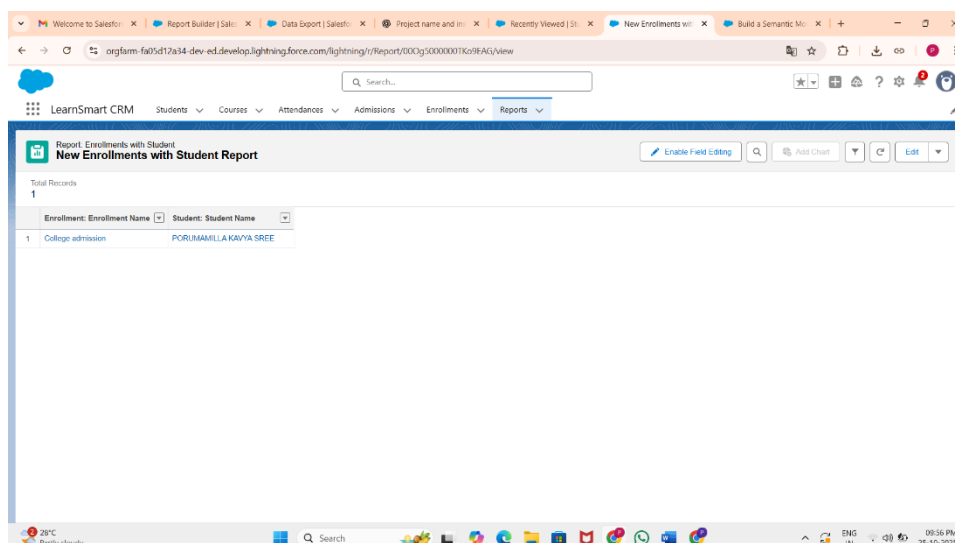


The screenshot displays the Salesforce Report Builder interface. The browser address bar shows the URL: `orgfarm-fa05d12a34-dev-ed.develop.lightning.force.com/lightning/r/Report/00Og50000001Ko9EAG/view`. The Salesforce navigation bar includes the 'LearnSmart CRM' logo and a search bar. The 'Reports' tab is selected in the top navigation menu. The report title is 'New Enrollments with Student Report'. Below the title, it indicates 'Total Records: 1'. The report table has two columns: 'Enrollment: Enrollment Name' and 'Student: Student Name'. The data row shows 'College admission' for the enrollment and 'PORUMAMILLA KAVYA SREE' for the student. The interface includes buttons for 'Enable Field Editing', 'Add Chart', and 'Edit'. The bottom of the screen shows a Windows taskbar with the date and time as 09:56 PM on 25-10-2025.

Enrollment: Enrollment Name	Student: Student Name
College admission	PORUMAMILLA KAVYA SREE

Report Types

Define which objects and fields are available for creating reports.

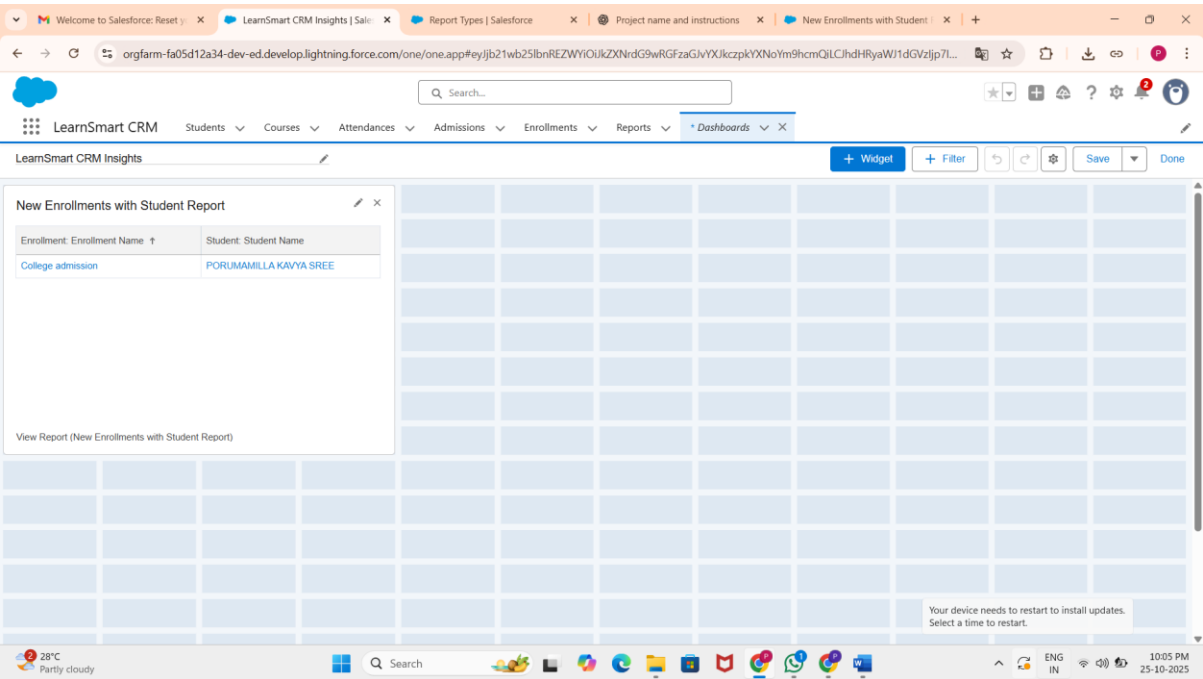


This screenshot is identical to the one above, showing the Salesforce Report Builder interface for the 'New Enrollments with Student Report'. It displays the same report structure with one record: 'College admission' for the enrollment and 'PORUMAMILLA KAVYA SREE' for the student. The interface elements, including the navigation bar, search bar, and bottom taskbar, are consistent with the previous image.

Enrollment: Enrollment Name	Student: Student Name
College admission	PORUMAMILLA KAVYA SREE

Dashboards

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

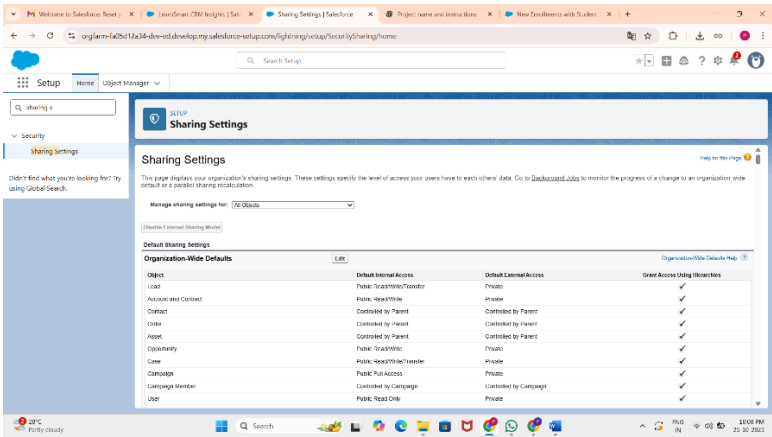


Dynamic Dashboards

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

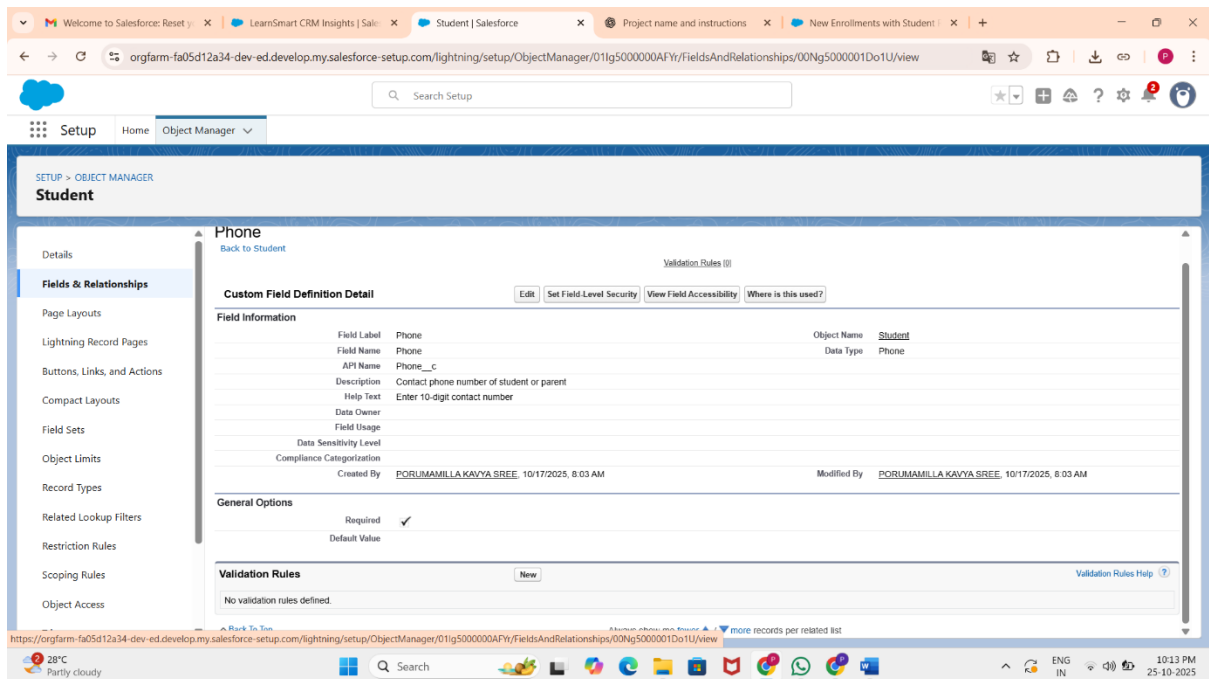
Sharing Settings

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.