

Phase 9: Reporting, Dashboards & Security Review

****Goal:****

Provide insights and secure the hotel management system.

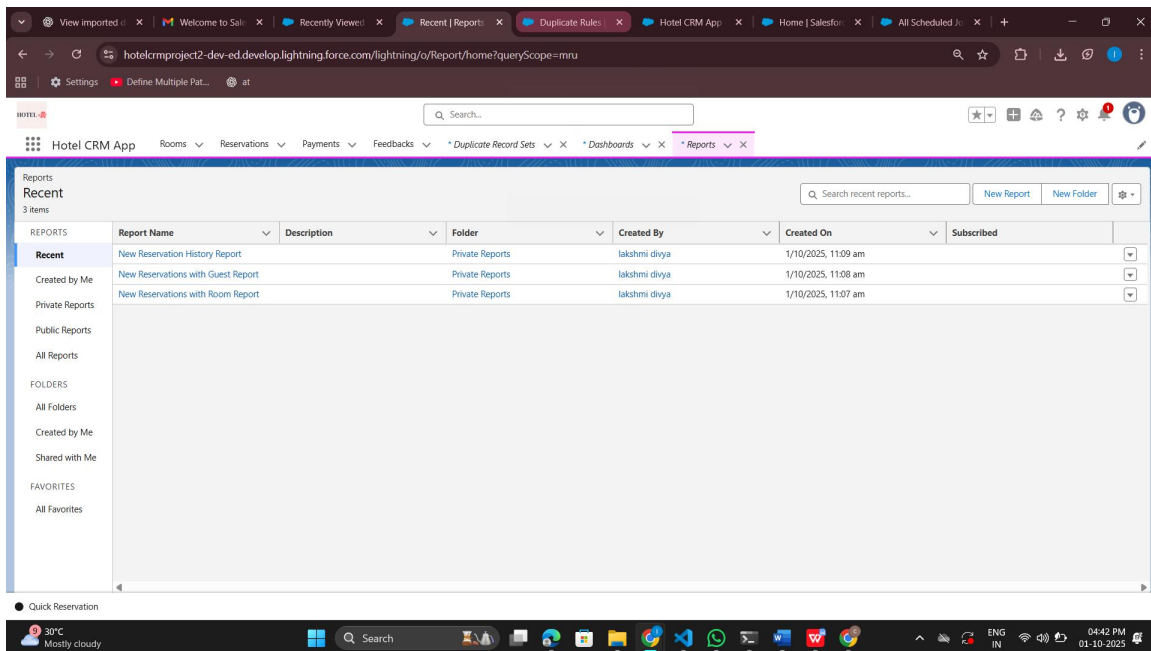
1. Reports

****Purpose:****

Gain valuable insights into hotel operations and performance.

****Key Reports:****

- ****Occupancy Rate:**** Monitor the percentage of rooms occupied.
- ****Revenue by Room Type:**** Track income by room categories.
- ****Guest Feedback:**** Analyze reviews and satisfaction metrics.



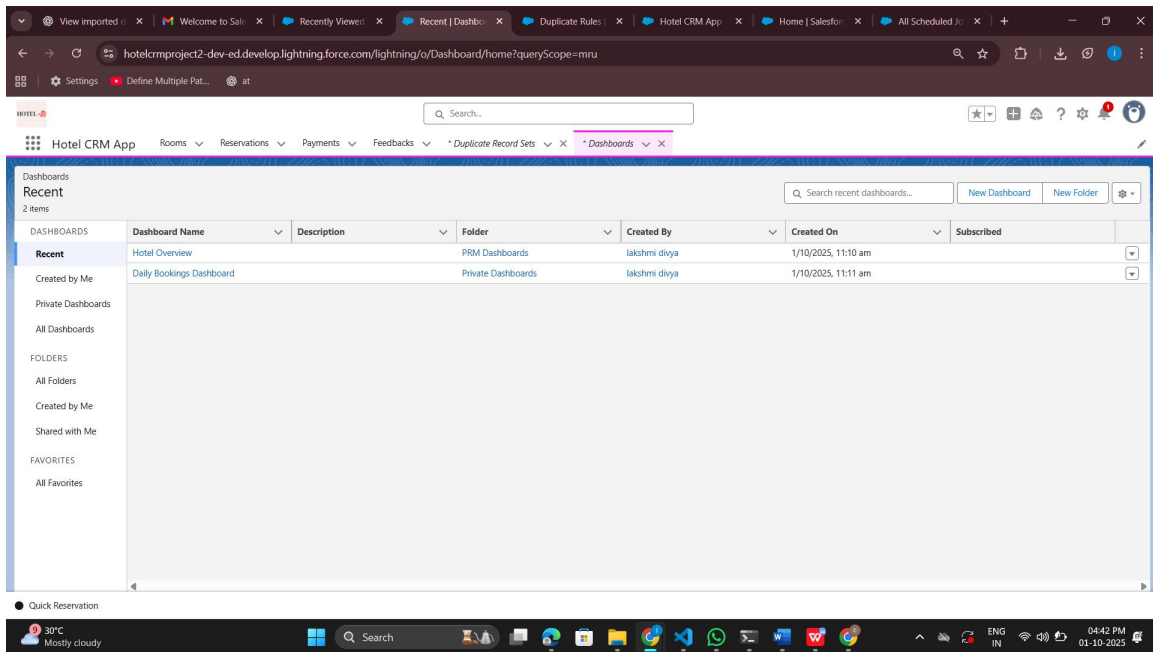
2. Dashboards

Purpose:

Visualize key metrics and trends in one view.

Examples:

- **Daily Bookings Dashboard:** View current day's bookings.
- **Revenue Trends Dashboard:** Analyze income patterns over time.



3. Dynamic Dashboards

****Purpose:****

Provide personalized dashboard views based on user.

****Use Case:****

Receptionists view dashboards showing only their own bookings.

****Setup:****

- Create dashboard with "Run as logged-in user" setting.
- Assign appropriate sharing settings.

The screenshot displays a Salesforce Lightning interface. The main content area shows a report titled "New Reservation History..." with a table of reservation records. The table has columns for Reservation, Owner Name, Edited By, Field / Event, Old Value, New Value, and Edit Date. The records show various reservation events for "lakshmi diya".

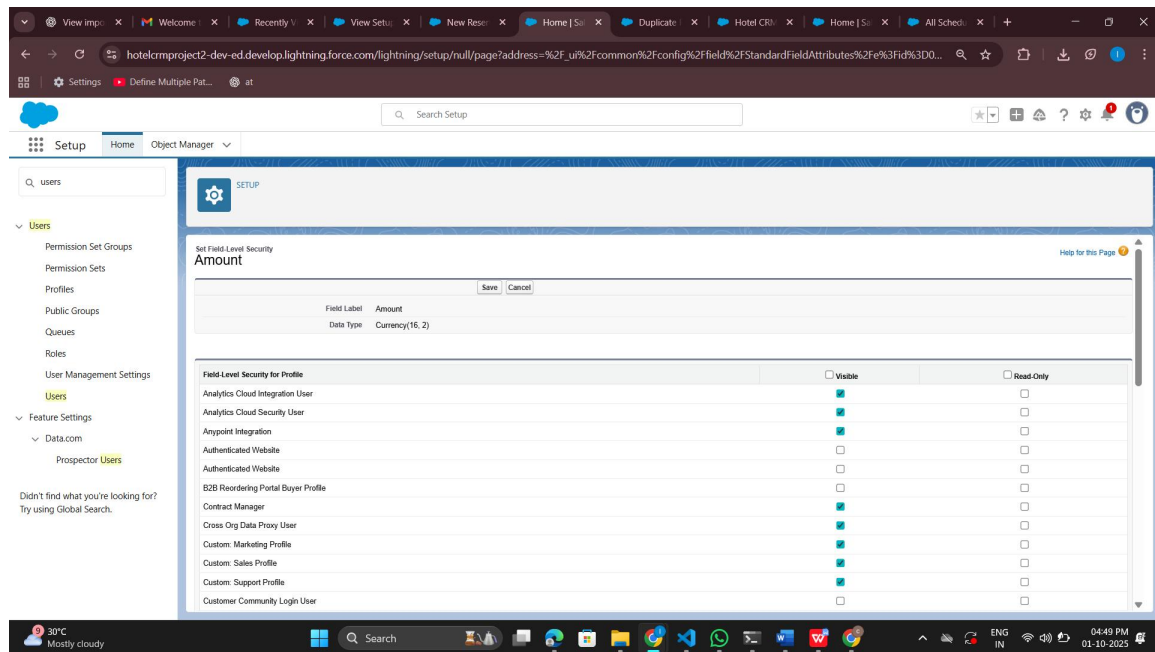
The sidebar on the right contains a list of navigation options, including:

- 1. Reports
 - **Purpose:** Gain valuable insights into hotel operations and performance.
 - **Key Reports:**
 - **Occupancy Rate:** Monitor the percentage of rooms occupied.
 - **Revenue by Room Type:** Track income by room categories.
 - **Guest Feedback:** Analyze reviews and satisfaction metrics.
 - [Insert Screenshot of Sample Reports]
- 2. Dashboards
 - **Purpose:** Visualize key metrics and trends in one view.
 - **Examples:**
 - **Daily Bookings Dashboard:** View current day's bookings.
 - **Revenue Trends Dashboard:** Analyze income patterns over time.
 - [Insert Screenshot of Sample Dashboards]
- 3. Dynamic Dashboards
 - **Purpose:** Provide personalized dashboard views based on user.
 - **Use Case:**
 - Receptionists view dashboards showing only their own bookings.
 - **Setup:**
 - Create dashboard with "Run as logged-in user" setting.
 - Assign appropriate sharing settings.
 - [Insert Screenshot of Dynamic Dashboard Settings]
- 4. Security Measures
 - **Field-Level Security (FLS):** Control visibility of sensitive data like guest contact or payment info.
 - **IP Restrictions:** Limit login access to specific, trusted IP ranges.
 - **Login Hours:**

4. Security Measures

Field-Level Security (FLS):

Control visibility of sensitive data like guest contact or payment info.



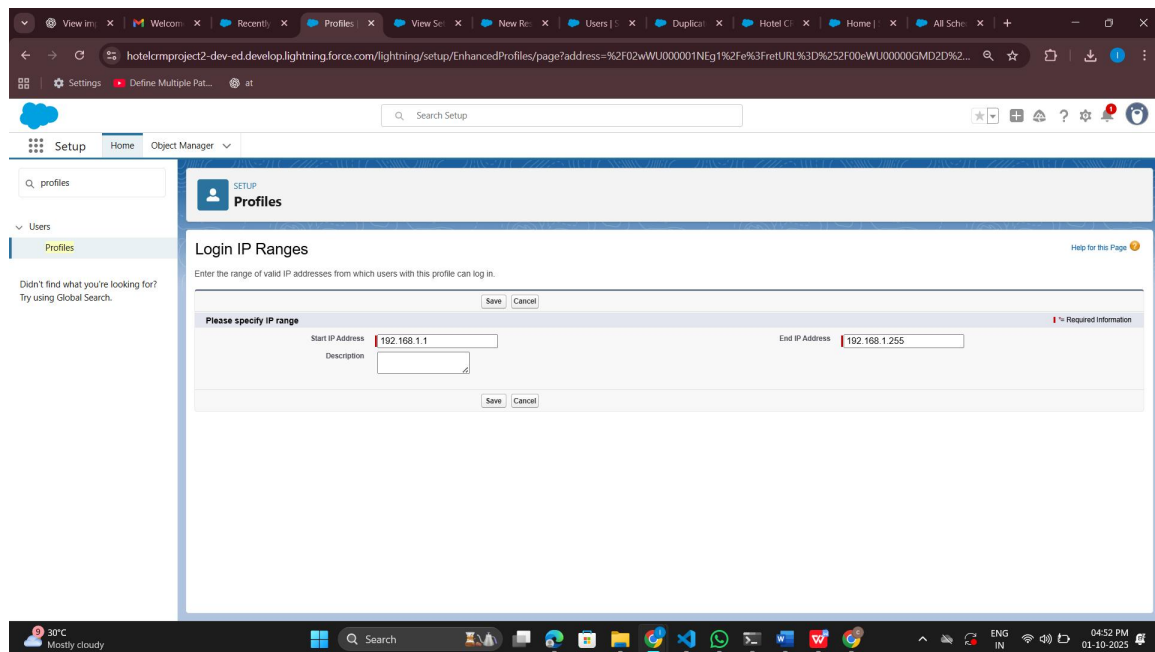
The screenshot shows the Salesforce Setup interface for Field-Level Security. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled "Set Field-Level Security" and shows a table for the "Amount" field. The table has columns for "Field Label", "Amount", and "Data Type". Below the table, there is a section for "Field-Level Security for Profile" with checkboxes for "Visible" and "Read Only" for various profiles.

Field Label	Amount	Data Type
		Currency(16, 2)

Field-Level Security for Profile	Visible	Read Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Login User	<input type="checkbox"/>	<input type="checkbox"/>

IP Restrictions:

Limit login access to specific, trusted IP ranges.



The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled "Login IP Ranges" and shows a form for specifying IP ranges. The form has fields for "Start IP Address" and "End IP Address", and a "Description" field. The "Start IP Address" field is filled with "192.168.1.1" and the "End IP Address" field is filled with "192.168.1.255".

Please specify IP range

Start IP Address: 192.168.1.1

End IP Address: 192.168.1.255

Description:

****Login Hours:****

Restrict user access during non-working hours for added security.

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The 'Login Hours' tab is selected, displaying a table for configuring login times by day. The table has columns for 'Day', 'Start Time', and 'End Time'. The current configuration shows login hours from 8:00 am IST to 10:00 pm IST for all days of the week. Below the table, there are sections for 'Login IP Ranges', 'Enabled Apex Class Access', and 'Enabled Visualforce Page Access', all of which are currently disabled.

Day	Start Time	End Time
Sunday	8:00 am IST	10:00 pm IST
Monday	8:00 am IST	10:00 pm IST
Tuesday	8:00 am IST	10:00 pm IST
Wednesday	8:00 am IST	10:00 pm IST
Thursday	8:00 am IST	10:00 pm IST
Friday	8:00 am IST	10:00 pm IST
Saturday	8:00 am IST	10:00 pm IST

5. Audit Trail

****Purpose:****

Track all significant changes in the system.

****Use Case:****

Monitor edits or deletions to reservation records.

****Setup Options:****

- Enable Field History Tracking on reservations.
- Use Setup Audit Trail to monitor admin changes.

The screenshot shows the Salesforce Lightning Setup page with the 'View Setup Audit Trail' interface. The page displays a table of audit trail entries for the last 20 entries, including actions like 'Added Login Ip Range to Receptionist Profile' and 'Changed profile Receptionist Profile'.

Date	User	Source Namespace Prefix	Action	Section	Delegate User
01/10/2025, 11:16:19 am IST	durgahotelcm@durga.com		Added Login Ip Range to Receptionist Profile from 192.168.1.1 to 192.168.1.255	Manage Users	
01/10/2025, 11:15:08 am IST	durgahotelcm@durga.com		Changed profile Receptionist Profile: field-level security for Reservation: Total Amount was changed from Read Only to No Access	Manage Users	
01/10/2025, 11:14:35 am IST	durgahotelcm@durga.com		Changed profile Receptionist Profile: field-level security for Reservation: Total Amount was changed from Read/Write to Read Only	Manage Users	
01/10/2025, 11:14:35 am IST	durgahotelcm@durga.com		Changed profile Manager Profile: field-level security for Reservation: Total Amount was changed from Read/Write to Read Only	Manage Users	
01/10/2025, 11:14:35 am IST	durgahotelcm@durga.com		Changed profile Custom: Marketing Profile: field-level security for Reservation: Total Amount was changed from Read/Write to Read Only	Manage Users	
01/10/2025, 10:57:35 am IST	durgahotelcm@durga.com		For duplicate rule Prevent_Duplicate_Guests, changed matching rules.	Duplicate Rule	
01/10/2025, 10:57:35 am IST	durgahotelcm@durga.com		Created new Contact duplicate rule "Prevent_Duplicate_Guests". Set "Record-Level Security" to "Enforce sharing rules"	Duplicate Rule	
01/10/2025, 10:56:10 am IST	durgahotelcm@durga.com		Contact matching rule, Guest Email Match Rule, activating by lakshmi divya	Matching Rule	
01/10/2025, 10:56:02 am IST	durgahotelcm@durga.com		For matching rule Guest Email Match Rule, added matching criteria where matching method is Exact, the field is Phone and match blank fields is "Match When Both Blank"	Matching Rule	
01/10/2025, 10:56:02 am IST	durgahotelcm@durga.com		For matching rule Guest Email Match Rule, added matching criteria where matching method is Exact, the field is Email and match blank fields is "Match When Both Blank"	Matching Rule	
01/10/2025, 10:56:02 am IST	durgahotelcm@durga.com		For matching rule Guest Email Match Rule, matching engine set to Exact Match Engine.	Matching Rule	
01/10/2025, 10:56:02 am IST	durgahotelcm@durga.com		Created new Contact matching rule Guest Email Match Rule	Matching Rule	

✓ Summary Checklist

- [] Reports created: Occupancy Rate, Revenue by Room Type, Guest Feedback
- [] Dashboards created: Daily Bookings, Revenue Trends
- [] Dynamic Dashboard set up for Receptionists
- [] Security measures configured: FLS, IP restrictions, login hours
- [] Audit trail enabled for reservations