

Phase 9: Reporting, Dashboards & Security Review

Project Title – “Finance Management System – Salesforce CRM”

Reports

Purpose: Generate insights on Contributions, Auctions, and Member activity.

Implementation in Project:

- Created multiple reports to monitor contributions and auction performance.
- Examples:
 - **Tabular Report** → List of Members with Contact + KYC ID.
 - **Summary Report** → Total Contributions grouped by Status (Paid, Pending, Overdue).
 - **Matrix Report** → Contributions grouped by Agent (rows) and Status (columns).

The screenshot shows the Salesforce Reports interface. At the top, there's a navigation bar with icons for Home, Members, Contributions, Report Builder, More, and a search bar. Below the navigation is a sidebar with categories: Reports, Recent (4 items), Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), Folders (All Folders, Created by Me, Shared with Me), and Favorites (All Favorites). The main content area displays a table of recent reports. The columns are: Report Name, Description, Folder, Created By, Created On, and Subscribed. The first report listed is 'Agent vs Contribution Status' under 'Private Reports' created by Manikanta Pemmireddy on 9/26/2025, 5:10 AM. The second report is 'New Members with Contributions Report' under 'Private Reports' created by Manikanta Pemmireddy on 9/26/2025, 5:05 AM. The third report is 'New Members Report' under 'Private Reports' created by Manikanta Pemmireddy on 9/26/2025, 5:00 AM. The fourth report is 'Sample Flow Report: Screen Flows' under 'Public Reports' created by Automated Process on 9/20/2025, 6:10 AM. A note next to this report says: "Which flows run, what's the status of each interview, and how long do users take to complete the screens?"

Dashboards

Purpose: Provide visual analysis of financial and auction performance.

Implementation in Project:

- Created a **Finance Dashboard** for Fund Managers.
- Components included:
 - **Bar Chart** → Contributions by Status.
 - **Pie Chart** → Auction Winners Distribution.
 - **Table** → Top Members with Overdue Contributions.

The screenshot shows a user interface for managing dashboards. At the top, there's a header bar with a cloud icon, search, and various settings. Below it, a navigation bar includes 'Finance Manageme...', 'Home', 'Members', 'Contributions', and a 'Recent | Dashboards' tab which is currently selected. A 'More' dropdown and a pencil icon are also present.

The main area displays a table titled 'Dashboards' under the 'Recent' section. The table has columns for 'Dashboard...', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. One item is listed:

DASHBOARDS	Dashboard...	Description	Folder	Created By	Created On	Subscribed
Recent	Contributions by Status	Private Dashboards	Manikanta Pemmireddy	9/26/2025, 5:11 AM		

On the left side, there's a sidebar with categories: 'Dashboards' (Recent, Created by Me, Private Dashboards, All Dashboards), 'Folders' (All Folders, Created by Me, Shared with Me), and 'Favorites' (All Favorites). A footer at the bottom left says 'Flow' with a lightning bolt icon.

Cloud icon

Search bar: Search...

Navigation bar: Home, Members, Contributions, Recent | Dashboards, More

Widget toolbar: + Widget, + Filter, Save, More

Widgets:

- New Members with Contr... (Status: Failed): We can't draw this chart because there is no data.
- Agent vs Contribution St... (Status: Failed): We can't draw this chart because there is no data.
- View Report (New Members with Contributions ...)
- New Members Report (Status: Failed): We can't draw this chart because there is no data.
- View Report (New Members Report)

Sharing Settings

Purpose: Control baseline data access across objects.

Implementation in Project:

- Configured Org-Wide Defaults (OWD):
 - Member_c → Private
 - Contribution_c → Controlled by Parent (Member)
 - Auction_c → Public Read Only
 - Notification_c → Private
- Sharing Rules applied so Contributions are shared with Fund Managers.

Auction	Public Read/Write	Public Read Only	<input checked="" type="checkbox"/>
Auction Participation	Public Read/Write	Private	<input checked="" type="checkbox"/>
Contribution	Controlled by Parent	Controlled by Parent	
Member	Public Read/Write	Private	<input checked="" type="checkbox"/>
Notification	Public Read/Write	Private	<input checked="" type="checkbox"/>

Field Level Security (FLS)

Purpose: Restrict sensitive field visibility.

Implementation in Project:

- Configured KYC_ID_c field visibility:
 - Visible only to Fund Managers.
 - Hidden for Agents and Members.

The screenshot shows the Salesforce Setup interface with the following details:

Header: Includes the Salesforce logo, a search bar with "Search Setup", and various navigation icons.

Breadcrumbs: Shows "Setup" as the active page, with "Home" and "Object Manager" as previous steps.

Left Sidebar: A sidebar titled "Sharing Settings" with a "Security" section expanded, showing "Sharing Settings". A message says "Didn't find what you're looking for? Try using Global Search."

Central Content:

- Section Header:** "SETUP" with a gear icon.
- Form Title:** "Set Field-Level Security" for "KYC ID".
- Buttons:** "Save" and "Cancel".
- Data Labels:** "Field Label" (KYC ID) and "Data Type" (Text(14) (Unique Case Insensitive)).
- Table:** "Field-Level Security for Profile" table.

Field-Level Security for Profile	<input type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Analytics Cloud Integration User	<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input type="checkbox"/>	<input type="checkbox"/>
Einstein Agent User	<input type="checkbox"/>	<input type="checkbox"/>
Finance Agent Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	<input type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User	<input type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Identity User	<input type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input type="checkbox"/>	<input type="checkbox"/>
Minimum Access - API Only Integrations	<input type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce	<input type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community Login User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community User	<input type="checkbox"/>	<input type="checkbox"/>
Read Only	<input type="checkbox"/>	<input type="checkbox"/>
Salesforce API Only System Integrations	<input type="checkbox"/>	<input type="checkbox"/>
Silver Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input type="checkbox"/>	<input type="checkbox"/>
Standard User	<input type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work.com Only User	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Purpose: Enforce secure login and session controls.

Implementation in Project:

- Setup → Session Settings.
- Configurations:
 - Session Timeout = 2 hours.

The screenshot shows the Salesforce Setup page for 'Session Settings'. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar is present. On the left, a sidebar shows 'Security' expanded, with 'Session Settings' selected. A message at the bottom of the sidebar says 'Didn't find what you're looking for? Try using Global Search.' The main content area has a blue header 'SETUP Session Settings'. Below it, a section titled 'Session Settings' contains the following information:

Set the session security and session expiration timeout for your organization.

Session Timeout

Timeout Value: 2 hours

Disable session timeout warning popup
 Force logout on session timeout

Session Settings

Lock sessions to the IP address from which they originated
 Lock sessions to the domain in which they were first used
 Terminate all of a user's sessions when an admin resets that user's password i
 Force relogin after Login-As-User
 Require HttpOnly attribute
 Use POST requests for cross-domain sessions
 Enforce login IP ranges on every request i
 When embedding a Lightning application in a third-party site, use a session token instead of a session cookie.

Extended use of IE11 with Lightning Experience

EXTENDED USE OF IE11 WITH LIGHTNING EXPERIENCE HAS NOW ENDED
AS OF DECEMBER 31, THE EXTENDED PERIOD HAS ENDED, AND USE OF INTERNET EXPLORER 11 (IE 11) WITH LIGHTNING EXPERIENCE IS NO LONGER SUPPORTED. ISSUES WITH PERFORMANCE OR FUNCTIONALITY THAT AFFECT ONLY IE 11 WILL NOT BE FIXED. PLEASE SWITCH TO A SUPPORTED BROWSER.

Caching

Enable caching and autocomplete on login page
 Enable secure and persistent browser caching to improve performance

Login IP Ranges

Purpose: Restrict login access to trusted IP addresses.

Implementation in Project:

- Configured Login IP Ranges for **Fund Manager Profile**.
- Example range:
 - Start IP: 115.244.41.200 (current IP for demo)
 - End IP: 115.244.41.200
- Ensures only logins from trusted IPs are permitted.

Login IP Ranges			
Action	IP Start Address	IP End Address	Description
Edit Del	115.244.41.200	115.244.41.200	Fund Manager IP Range

Audit Trail

Purpose: Track configuration changes for compliance.

Implementation in Project:

- Accessed **View Setup Audit Trail** in Setup.
- Verified recent changes to Profiles, OWD, and Flows.
- Provides accountability and regulatory readiness.

The screenshot shows the 'View Setup Audit Trail' page in the Salesforce Setup interface. The page displays a table of audit logs with columns for Date, User, Source Namespace Prefix, Action, Section, and Delegate User. The table lists 20 entries from September 26, 2025, showing various security-related changes such as profile modifications and session settings. The interface includes standard Salesforce navigation elements like tabs, a search bar, and a help icon.

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/26/2025, 5:28:01 AM PDT	manikantaemreddy@agentforce.com		Added Login Ip Range to Finance Agent Profile from 115.244.41.200 to 115.244.41.200	Manage Users	
9/26/2025, 5:24:17 AM PDT	manikantaemreddy@agentforce.com		Session Security Level for Multi-Factor Authentication was set to High Assurance	Session Settings	
9/26/2025, 5:24:17 AM PDT	manikantaemreddy@agentforce.com		Session Security Level for Passwordless Login was set to Standard	Session Settings	
9/26/2025, 5:24:17 AM PDT	manikantaemreddy@agentforce.com		Session Security Level for Lightning Login was set to Standard	Session Settings	
9/26/2025, 5:24:17 AM PDT	manikantaemreddy@agentforce.com		Session Security Level for Activation was set to Standard	Session Settings	
9/26/2025, 5:24:17 AM PDT	manikantaemreddy@agentforce.com		Session Security Level for Delegated Authentication was set to Standard	Session Settings	
9/26/2025, 5:24:17 AM PDT	manikantaemreddy@agentforce.com		Session Security Level for Username Password was set to Standard	Session Settings	
9/26/2025, 5:21:33 AM PDT	manikantaemreddy@agentforce.com		Changed profile Work.com Only User: field-level security for Member: KYC ID was changed from 2 to 0	Manage Users	
9/26/2025, 5:21:33 AM PDT	manikantaemreddy@agentforce.com		Changed profile Standard User: field-level security for Member: KYC ID was changed from ReadWrite to No Access	Manage Users	
9/26/2025, 5:21:33 AM PDT	manikantaemreddy@agentforce.com		Changed profile Standard Platform User: field-level security for Member: KYC ID was changed from ReadWrite to No Access	Manage Users	
9/26/2025, 5:21:33 AM PDT	manikantaemreddy@agentforce.com		Changed profile Solution Manager: field-level security for Member: KYC ID was changed from ReadWrite to No Access	Manage Users	
9/26/2025, 5:21:33 AM PDT	manikantaemreddy@agentforce.com		Changed profile Salesforce API Only System Integrations: field-level security for Member: KYC ID was changed from ReadWrite to No Access	Manage Users	
9/26/2025, 5:21:33 AM PDT	manikantaemreddy@agentforce.com		Changed profile Read Only: field-level security for Member: KYC ID was changed from ReadWrite to No Access	Manage Users	
9/26/2025, 5:21:33 AM PDT	manikantaemreddy@agentforce.com		Changed profile Partner App Subscription User: field-level security for Member: KYC ID was changed from 2 to 0	Manage Users	
9/26/2025, 5:21:33 AM PDT	manikantaemreddy@agentforce.com		Changed profile Minimum Access - Salesforce: field-level security for Member: KYC ID was changed	Manage Users	

Summary

Phase 9 enhanced the Finance Management System with **reporting and security** features:

- Reports and Dashboards gave visibility into contributions, overdue payments, and auctions.
- Dynamic Dashboards ensured role-based perspectives for Managers and Agents.
- Sharing Settings and FLS strengthened data privacy.
- Session Settings, Login IP Ranges, and Audit Trail improved compliance and trust.

This phase ensures the application is **data-driven, transparent, and secure**, ready for regulatory auditing and enterprise use.