Phase 9: Reporting, Dashboards & Security Review

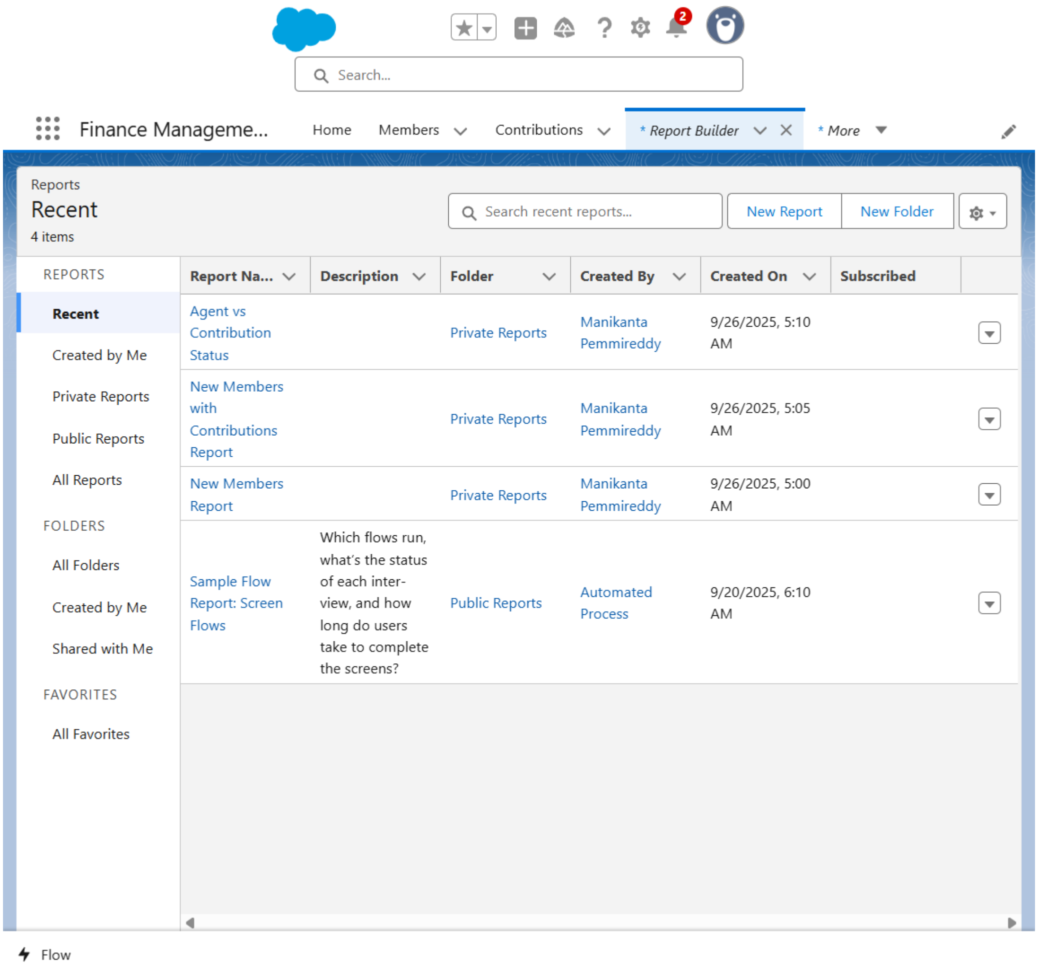
Project Title – "Finance Management System – Salesforce CRM"

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).

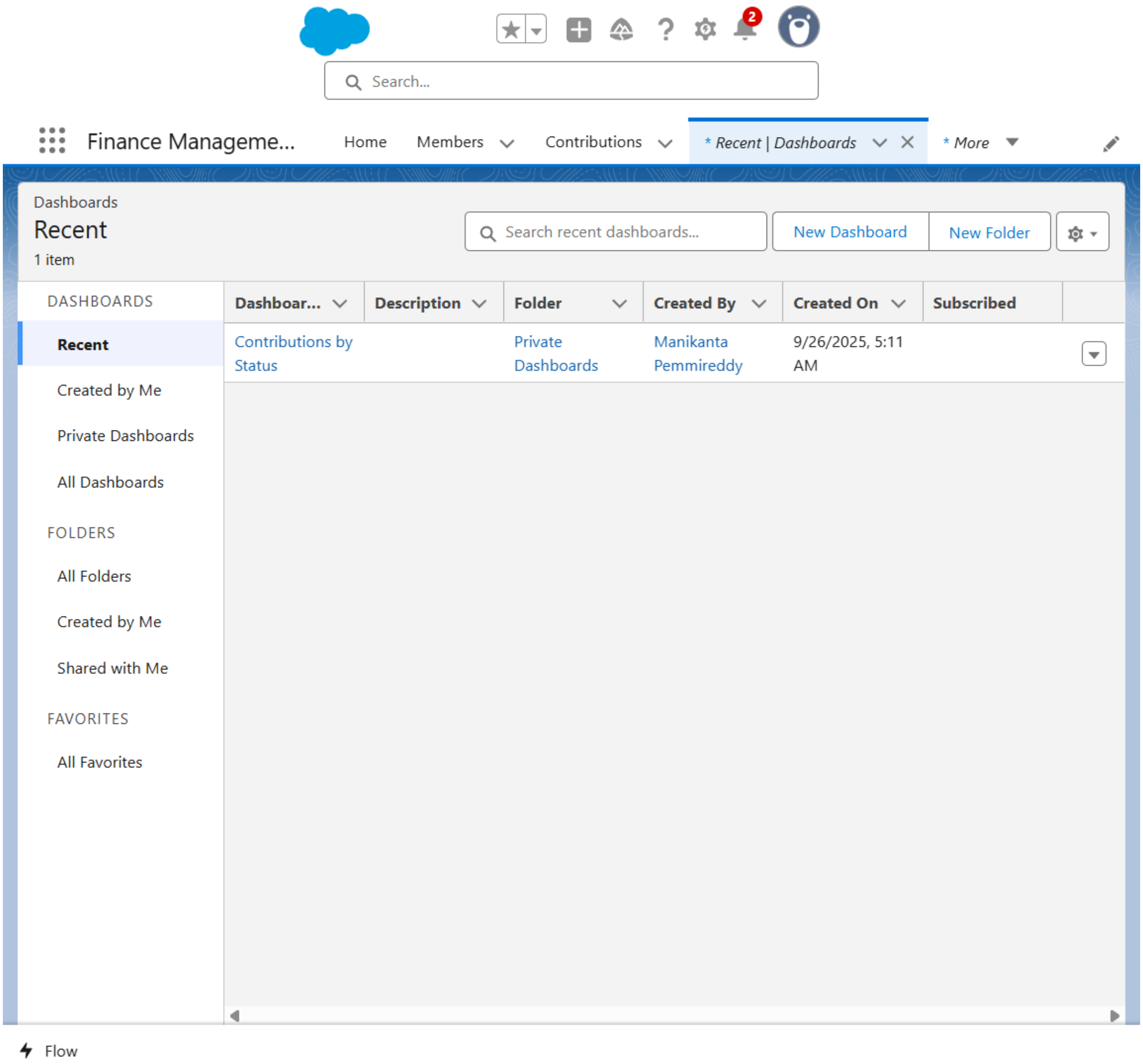


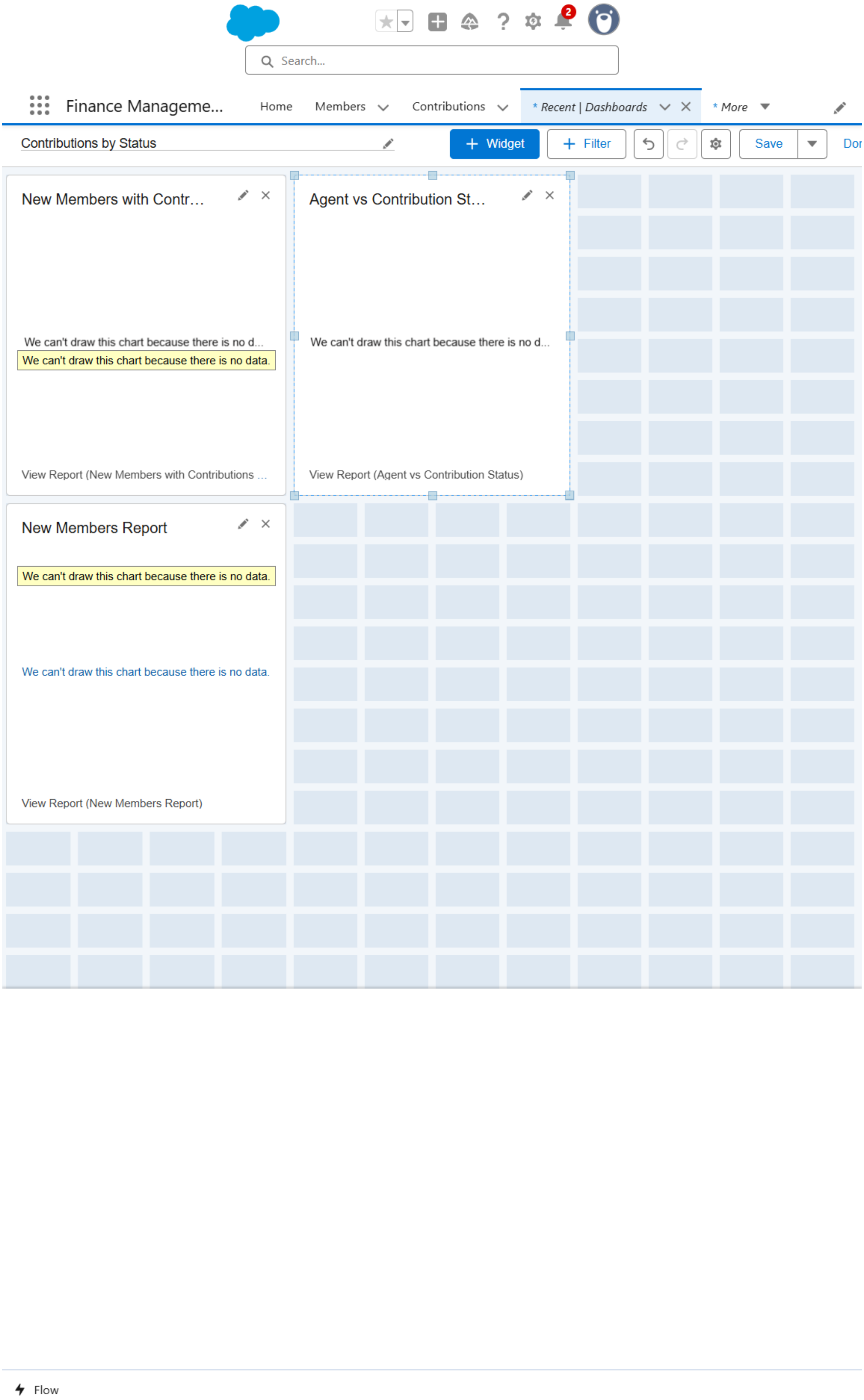
Dashboards

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.

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View Report (Agent vs Contribution Status)
New Members Report
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View Report (New Members Report)
Flow

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.

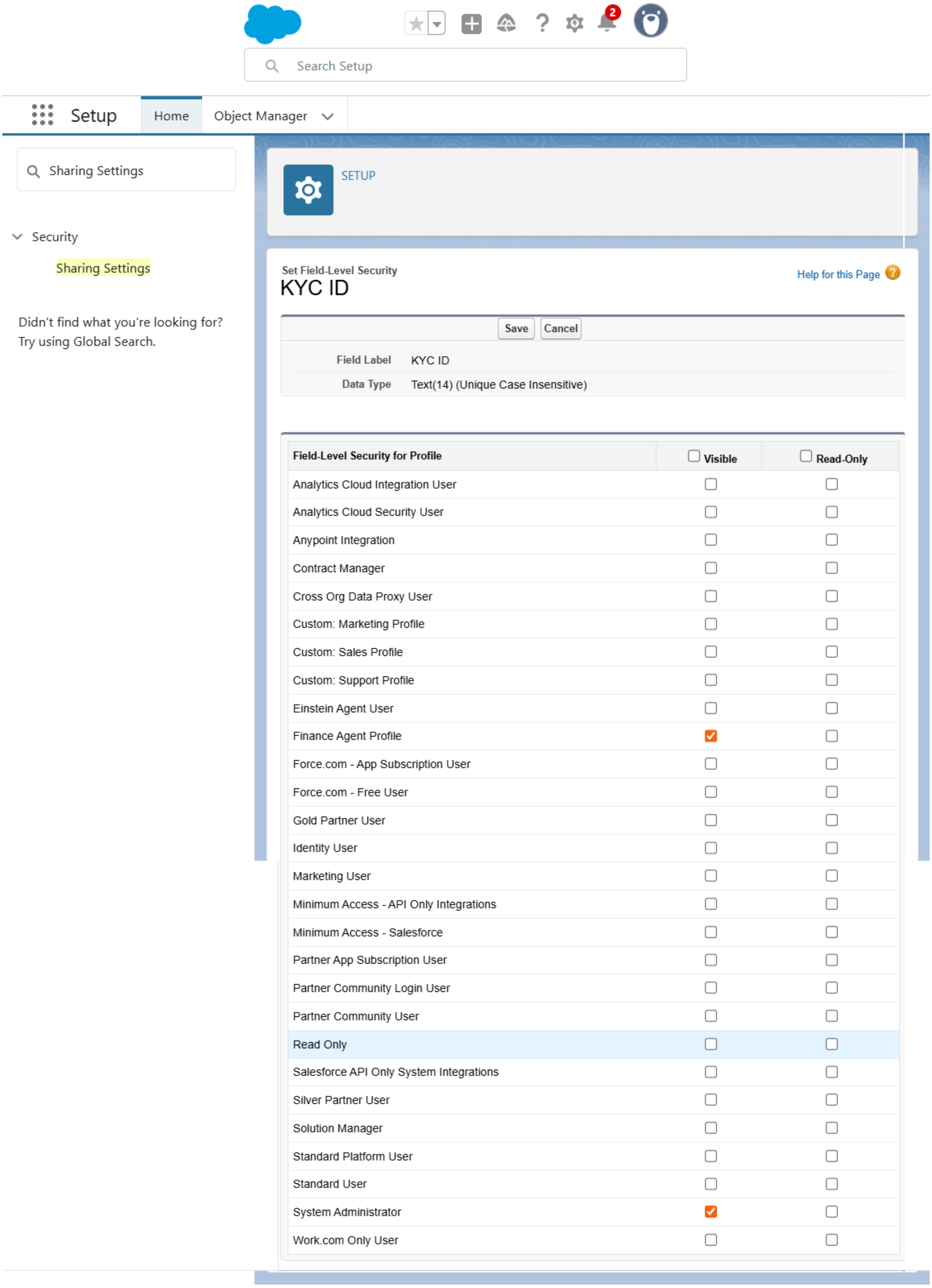
Auction	Public Read/Write	Public Read Only	✓
Auction Participation	Public Read/Write	Private	✓
Contribution	Controlled by Parent	Controlled by Parent	
Member	Public Read/Write	Private	✓
Notification	Public Read/Write	Private	✓

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.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Setup
Home
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Sharing Settings
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Sharing Settings
Didn't find what you're looking for?
Try using Global Search.
SETUP
Set Field-Level Security
KYC ID
Help for this Page
Save
Cancel
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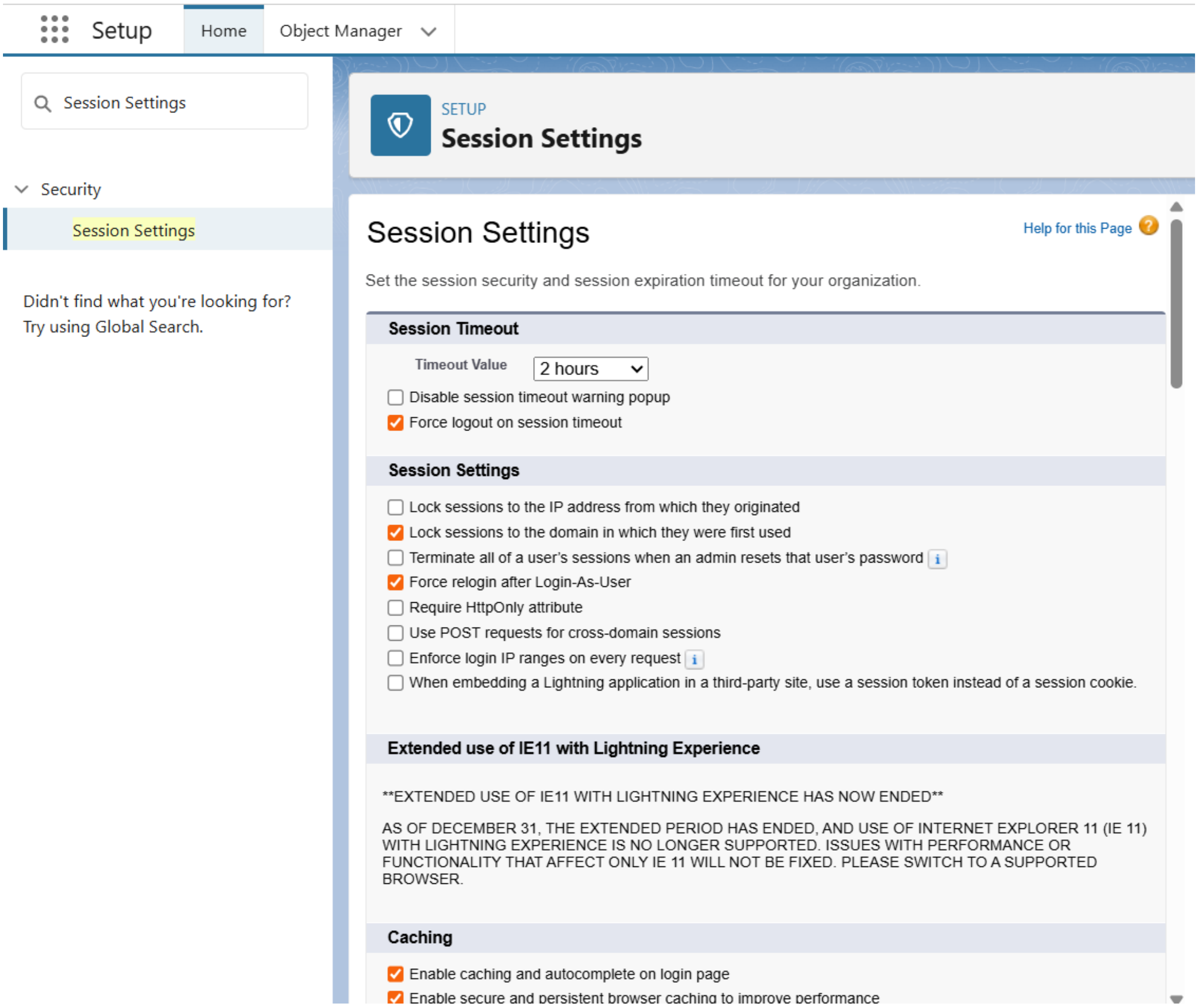
Analytics Cloud Security User
Anypoint Integration
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Einstein Agent User
Finance Agent Profile
Force.com - App Subscription User
Force.com - Free User
Gold Partner User
Identity User
Marketing User
Minimum Access - API Only Integrations
Minimum Access - Salesforce
Partner App Subscription User
Partner Community Login User
Partner Community User
Read Only
Salesforce API Only System Integrations
Silver Partner User
Solution Manager
Standard Platform User
Standard User
System Administrator
Work.com Only User

Session Settings

Purpose: Enforce secure login and session controls.

Implementation in Project:

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

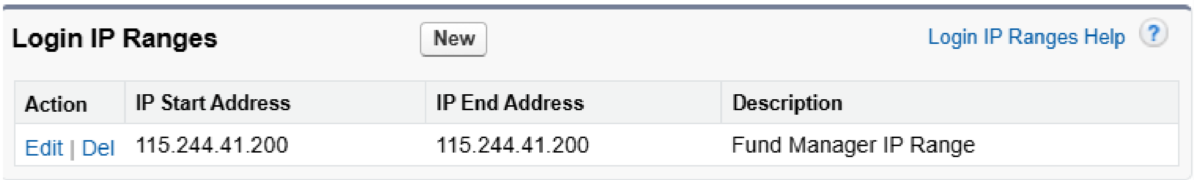


Login IP Ranges

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 New Login IP Ranges Help

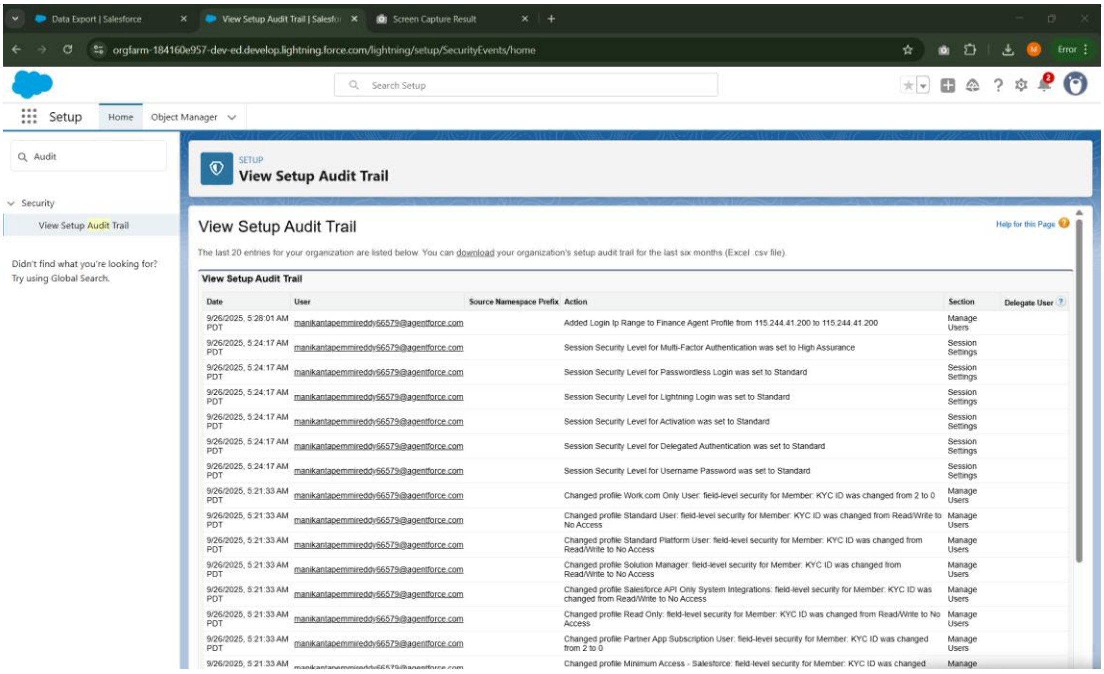
Action	IP Start Address	IP End Address	Description
Edit | Del	115.244.41.200	115.244.41.200	Fund Manager IP Range

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.



View Setup Audit Trail

The last 20 entries for your organization are listed below. You can download your organization's setup audit trail for the last six months (Excel .csv file).

View Setup Audit Trail

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/26/2025, 5:28:01 AM PDT	manikantapemmireddy66579@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	manikantapemmireddy66579@agentforce.com		Session Security Level for Multi-Factor Authentication was set to High Assurance	Session Settings	
9/26/2025, 5:24:17 AM PDT	manikantapemmireddy66579@agentforce.com		Session Security Level for Passwordless Login was set to Standard	Session Settings	
9/26/2025, 5:24:17 AM PDT	manikantapemmireddy66579@agentforce.com		Session Security Level for Lightning Login was set to Standard	Session Settings	
9/26/2025, 5:24:17 AM PDT	manikantapemmireddy66579@agentforce.com		Session Security Level for Activation was set to Standard	Session Settings	
9/26/2025, 5:24:17 AM PDT	manikantapemmireddy66579@agentforce.com		Session Security Level for Delegated Authentication was set to Standard	Session Settings	
9/26/2025, 5:24:17 AM PDT	manikantapemmireddy66579@agentforce.com		Session Security Level for Username Password was set to Standard	Session Settings	
9/26/2025, 5:21:33 AM PDT	manikantapemmireddy66579@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	manikantapemmireddy66579@agentforce.com		Changed profile Standard User: field-level security for Member: KYC ID was changed from Read/Write to No Access	Manage Users	
9/26/2025, 5:21:33 AM PDT	manikantapemmireddy66579@agentforce.com		Changed profile Standard Platform User: field-level security for Member: KYC ID was changed from Read/Write to No Access	Manage Users	
9/26/2025, 5:21:33 AM PDT	manikantapemmireddy66579@agentforce.com		Changed profile Solution Manager: field-level security for Member: KYC ID was changed from Read/Write to No Access	Manage Users	
9/26/2025, 5:21:33 AM PDT	manikantapemmireddy66579@agentforce.com		Changed profile Salesforce API Only System Integrations: field-level security for Member: KYC ID was changed from Read/Write to No Access	Manage Users	
9/26/2025, 5:21:33 AM PDT	manikantapemmireddy66579@agentforce.com		Changed profile Read Only: field-level security for Member: KYC ID was changed from Read/Write to No Access	Manage Users	
9/26/2025, 5:21:33 AM PDT	manikantapemmireddy66579@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	manikantapemmireddy66579@agentforce.com		Changed profile Minimum Access - Salesforce: field-level security for Member: KYC ID was changed	Manage	

✅ 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.