

Phase 9: Reporting, Dashboards & Security Review

In Phase 9, the focus was on implementing **reporting, dashboards, and security features** in Salesforce for the Corporate Loan Management System (CLMS). This phase ensures that business stakeholders (Loan Officers, Branch Managers, and Administrators) can access **real-time insights** into loan performance, EMI tracking, and overdue status while maintaining strict security and compliance for customer data.

1. Reports

Salesforce Reports were created to analyze CLMS data from different perspectives:

Reports Implemented:

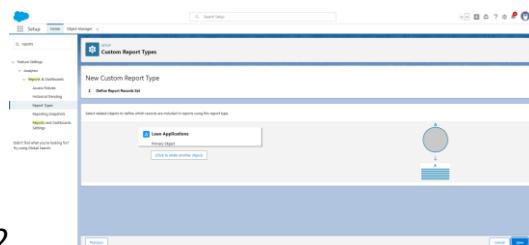
1. Tabular Report – Loan Applications List
2. Summary Report – Loans by Status
3. Matrix Report – Loans by Branch vs Status
4. Joined Report – Loan Applications with EMI Schedules

2. Report Types

To support advanced reporting, a **Custom Report Type** was created:

- **Primary Object:** Loan Application (Loan_Application__c).
- **Related Object:** EMI Schedule (EMI_Schedule__c).
- **Report Type Name:** Loan Applications with EMI Details.
- Made available in the Reports tab.

Outcome: Reports can now show **both loan and EMI details** together in a single report.



The screenshot shows the Salesforce Setup interface with the 'Custom Report Types' page open. The page title is 'Custom Report Types' and the specific report type is 'Loan Applications with EMI Schedules'. The 'Details' section shows the following information:

- Display Label:** Loan Applications with EMI Schedules
- API Name:** Loan_Applications_with_EMI_Schedules
- Description:** Report type to show Loan Applications with their EMI Schedules
- Created By:** K Nikhilesh Reddy, 9/26/25, 7:08 PM
- Store in Category:** accounts
- Deployment Status:** Deployed
- Modified By:** K Nikhilesh Reddy, 9/26/25, 7:08 PM

The 'Object Relationships' section indicates that 'Loan Applications (A)' have at least one related record from 'EMI Schedules (B)'. A diagram shows two overlapping circles labeled A and B, with a downward arrow pointing to a bar chart.

The 'Fields' section lists the source object 'Loan Applications' and the number of included fields (22), and the target object 'EMI Schedules' and the number of included fields (10).

3. Dashboards

Dashboards were created to give managers and executives a **visual overview** of loan and EMI performance.

CLMS Dashboard Components:

1. Loans by Status (Donut Chart)

- Source: Summary Report (Loans by Status).
- Visualizes loan distribution across different statuses.

2. Loans by Branch vs Status (Stacked Bar Chart)

- Source: Matrix Report.
- Displays branch-wise loan performance with approval breakdown.

3. Overdue EMI Count (Metric Widget)

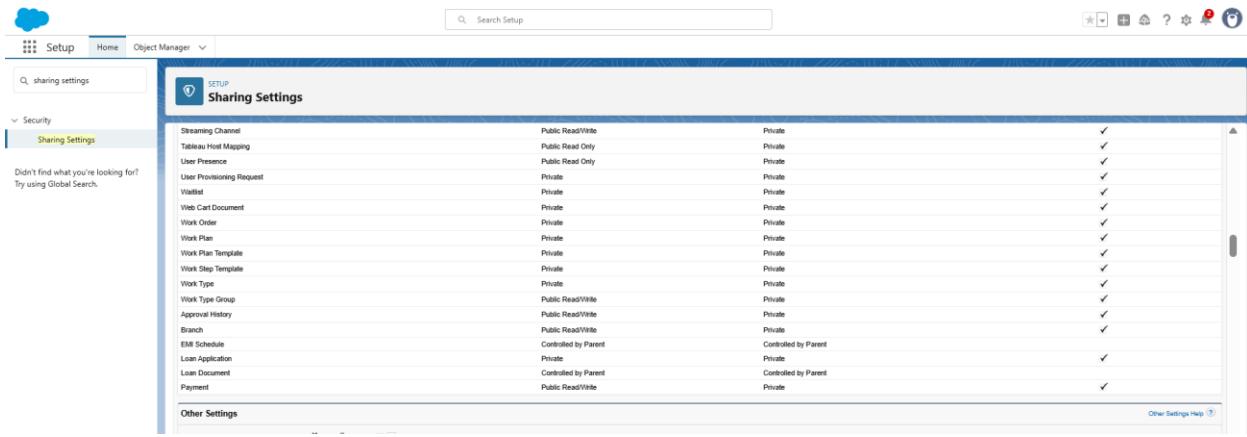
- Source: Overdue EMI Report.
- Highlights number of overdue EMI payments at a glance.

5. Security Review

a) Sharing Settings

- **Loan Application:** Set to **Private** → Shared through role hierarchy.
- **EMI Schedule:** Controlled by Loan Application (inherits access).
- **Customer:** Set to **Private** to restrict sensitive customer information.

Outcome: Sensitive customer and loan data is **restricted and protected**.



The screenshot shows the Salesforce Sharing Settings page. The left sidebar has a 'Sharing Settings' section selected. The main area displays a table of objects and their sharing permissions. Most objects have 'Private' or 'Controlled by Parent' settings, while some like 'Tableau Host Mapping' and 'User Presence' are set to 'Public Read Only'. A 'Work Order' object is set to 'Public ReadWrite'. The table includes columns for Object Name, Sharing Rule Type, and Permissions.

Object	Sharing Rule Type	Permissions
Streaming Channel	Public ReadWrite	✓
Tableau Host Mapping	Public Read Only	✓
User Presence	Public Read Only	✓
User Provisioning Request	Private	✓
Walllist	Private	✓
Web Cart Document	Private	✓
Work Order	Public ReadWrite	✓
Work Plan	Private	✓
Work Plan Template	Private	✓
Work Step Template	Private	✓
Work Type	Private	✓
Work Type Group	Public ReadWrite	✓
Approve History	Public ReadWrite	✓
Branch	Private	✓
EMI Schedule	Controlled by Parent	✓
Loan Application	Private	✓
Loan Document	Controlled by Parent	✓
Payment	Public ReadWrite	✓

b) Field-Level Security (FLS)

- Restricted sensitive fields:
 - `Interest_Rate__c` (visible only to Managers/Admins).
 - `Approval_Status__c` (hidden from Loan Officers).
- Configured via Profile → Field-Level Security.

Outcome: Prevents unauthorized users from viewing sensitive loan/financial details.

The screenshot shows the 'Loan Application' object in the 'Object Manager'. A new custom field, 'Interest Rate', is being created under the 'Fields & Relationships' tab. The 'Field Information' section includes the field label 'Interest Rate', field name 'Interest_Rate', and API name 'Interest_Rate_c'. The data type is set to 'Percent'. Other settings like 'Required' and 'Length' (5) are also specified.

c) Session Settings

- Configured session policies:
 - Session Timeout → 2 hours.
 - Locked sessions to IP address.
 - Enabled Multi-Factor Authentication (MFA).

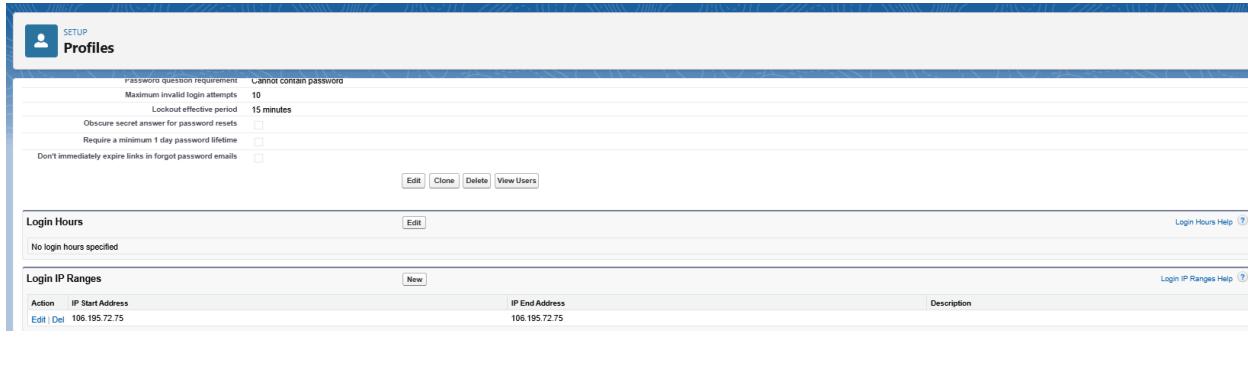
Outcome: Strengthened login security to prevent unauthorized access.

The 'Session Settings' page allows configuring session security and timeout. Key settings include a session timeout of 2 hours, locking sessions to the IP address, and enabling MFA. It also includes sections for 'Session Settings' (such as locking sessions to domain and forcing HTTPS), 'Extended use of IE11 with Lightning Experience' (warning about the end of support), and 'Caching' (enabling caching and secure browsing).

d) Login IP Ranges

- Restricted **Loan Officer profile** to specific trusted IP ranges (e.g., company VPN).

Outcome: Users can log in only from approved networks.



e) Audit Trail

- Setup Audit Trail enabled to track system changes for last 6 months.
- Reviewed changes made to objects, fields, and automation.

Outcome: Provides accountability and governance over system configuration changes.

1	Date	User	Source Na	Action	Section	Delegate User
2	9/26/2025	nikhileshreddy.k157@	Added Log	Manage Users		
3	9/26/2025	nikhileshreddy.k157@	Changed p	Manage Users		
4	9/26/2025	nikhileshreddy.k157@	Requested	Data Export		
5	9/26/2025	nikhileshreddy.k157@	Loan Appli	Matching Rule		
6	9/26/2025	nikhileshreddy.k157@	For matchi	Matching Rule		
7	9/26/2025	nikhileshreddy.k157@	For matchi	Matching Rule		
8	9/26/2025	nikhileshreddy.k157@	For matchi	Matching Rule		
9	9/26/2025	nikhileshreddy.k157@	For matchi	Matching Rule		
10	9/26/2025	nikhileshreddy.k157@	Created ne	Matching Rule		
11	9/26/2025	nikhileshreddy.k157@	For the 01	Duplicate Rule		
12	9/26/2025	nikhileshreddy.k157@	For the 01	Duplicate Rule		
13	9/26/2025	nikhileshreddy.k157@	For the 01	Duplicate Rule		
14	9/26/2025	nikhileshreddy.k157@	Created ne	Duplicate Rule		
15	9/26/2025	nikhileshreddy.k157@	Remote Pr	Security Controls		
16	9/26/2025	nikhileshreddy.k157@	Added Cha	Change Data Capture		
17	9/26/2025	nikhileshreddy.k157@	Added Cha	Change Data Capture		
18	9/26/2025	nikhileshreddy.k157@	Changed L	Apex Class		
19	9/26/2025	nikhileshreddy.k157@	Changed L	Apex Class		
20	9/26/2025	nikhileshreddy.k157@	Created cu	Custom Objects		
21	9/26/2025	nikhileshreddy.k157@	Created cu	Custom Objects		
22	9/26/2025	nikhileshreddy.k157@	Created cu	Custom Objects		
23	9/26/2025	nikhileshreddy.k157@	Created cu	Custom Objects		
24	9/26/2025	nikhileshreddy.k157@	Created cu	Custom Objects		
25	9/26/2025	nikhileshreddy.k157@	Created Lc	Apex Class		
26	9/26/2025	nikhileshreddy.k157@	Created Lc	Apex Class		
27	9/26/2025	nikhileshreddy.k157@	Changed L	Apex Trigger		

Final Outcomes of Phase 9

- **Reports:** Enabled deep analysis of loans, EMIs, and approval patterns.
- **Report Types:** Enabled combined Loan + EMI reporting.
- **Dashboards:** Provided managers with a quick, visual summary of loan performance and overdue payments.
- **Dynamic Dashboards:** Ensur