





Determines what objects/fields are available in a report.

Preview Layout   Edit Layout   Clone   Delete

SETUP

Custom Report Types

Project Custom Report

Preview Layout

Edit Layout

Clone

Delete

Close

Below is the information for this custom report type. You can click the buttons on this to preview or update information for the custom report type

Details

Display Label

Project Custom Report

API Name

Project\_Custom\_Report

Description

Project Custom Report

Created By

Rajatveer Singh Pasricha, 9/29/25, 5:36 PM

Store in Category

accounts

Deployment Status

In Development

Modified By

Rajatveer Singh Pasricha, 9/29/25, 5:36 PM

Fields

Source Object	Included Fields
Projects	16
Payments	14

Object Relationships

Projects (A)

with at least one related record from Payments (B)

# DASHBOARDS:

Visual display of reports.

Dashboard

Account Dashboard

Last refreshed 1 day ago. Refresh this dashboard to see the latest data.

As of Sep 30, 2025, 4:34 AM Viewing as Rajatveer Singh Pasricha

New Accounts Report

Record Count: 4

Account Name

Apex Engineering

Delta Builders

Greenfield Materials

MPEB

View Report (New Accounts Report)

As of Sep 30, 2025, 4:34 AM

New Accounts Report

Record Count

Account Name

View Report (New Accounts Report)

As of Sep 30, 2025, 4:34 AM

Dashboard

Project Dashboard

As of Oct 1, 2025, 4:31 AM Viewing as Rajatveer Singh Pasricha

Copy of New Projects Report

Record Count

Project: Project Name

Bridge Renovation

Bulb Installation

Bulb Light

Highway Expansion

View Report (Copy of New Projects Report)

As of Oct 1, 2025, 4:31 AM

Copy of New Projects Report

Record Count

Project Code

PC-0001

PC-0002

PC-0003

PC-0004

View Report (Copy of New Projects Report)

As of Oct 1, 2025, 4:31 AM

## SHARING SETTINGS:

Controls record-level access.

SETUP Sharing Settings			
Shift	Private	Private	✓
Shipment	Private	Private	✓
Shipping Carrier	Public Read Only	Private	✓
Shipping Carrier Method	Public Read Only	Private	✓
Shipping Configuration Set	Public Read Only	Private	✓
Streaming Channel	Public Read/Write	Private	✓
Tableau Host Mapping	Public Read Only	Private	✓
User Provisioning Request	Private	Private	✓
Waitlist	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Invoice	Public Read/Write	Private	✓
Material Request	Controlled by Parent	Controlled by Parent	
Payment	Public Read/Write	Private	✓
Project	Public Read/Write	Private	✓
Task	Controlled by Parent	Controlled by Parent	

## FIELD LEVEL SECURITY:

Controls who can see/edit a specific field.

Field-Level Security for Profile	<input checked="" type="checkbox"/> Visible	<input type="checkbox"/> 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"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contractor	<input type="checkbox"/>	<input type="checkbox"/>

Vendor	<input type="checkbox"/>	<input type="checkbox"/>
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Field-Level Security for Profile	<input type="checkbox"/> Visible	<input type="checkbox"/> 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"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contractor	<input 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"/>
Finance	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Identity User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Minimum Access - API Only Integrations	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>



## **SESSION SETTINGS:**

Controls login/session security (timeouts, 2FA, IP).

# Session Settings

Help for this Page ?

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

# LOGIN IP RANGES:

Restrict user logins by IP.

Login IP Ranges

New

Login IP Ranges Help ?

Action	IP Start Address	IP End Address	Description
<a href="#">Edit</a>   <a href="#">Del</a>	106.222.218.226	106.222.218.226	

# AUDIT TRAIL:

Tracks changes to setup/configurations.

View Setup Audit Trail

Help for this Page ?

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).

Date	User	Source Namespace Prefix	Action	Section	Delegate User ?
27/09/2025, 7:05:25 pm IST	constructioncm@oppla.net		Added Login Ip Range to System Administrator from 106.222.218.226 to 106.222.218.226	Manage Users	
27/09/2025, 6:11:12 pm IST	constructioncm@oppla.net		Requested an export	Data Export	
27/09/2025, 5:49:12 pm IST	constructioncm@oppla.net		Created ProjectAPIService Apex Class code	Apex Class	
27/09/2025, 5:49:06 pm IST	constructioncm@oppla.net		Created external identifier designation: Project Project Code	Company Information	
27/09/2025, 5:48:53 pm IST	constructioncm@oppla.net		Organization setup action: changedCFUniqueOnCustom has changed from Project Code to Projects	Custom Objects	
27/09/2025, 5:45:38 pm IST	constructioncm@oppla.net		Remote Proxy insert JSONPlaceholder: https://jsonplaceholder.typicode.com	Security Controls	
27/09/2025, 5:20:43 pm IST	constructioncm@oppla.net		For duplicate rule Same Account, changed evaluation criteria.	Duplicate Rule	
27/09/2025, 5:20:43 pm IST	constructioncm@oppla.net		For duplicate rule Same Account, changed matching rules.	Duplicate Rule	
27/09/2025, 5:20:43 pm IST	constructioncm@oppla.net		Created new Account duplicate rule "Same Account". Set "Record-Level Security" to "Enforce sharing rules"	Duplicate Rule	
27/09/2025, 4:55:27 pm IST	constructioncm@oppla.net		Deactivated flow with Name "Automatic Pro" and Unique Name "Automatic_Project_Assignment"	Flows	
27/09/2025, 4:55:19 pm IST	constructioncm@oppla.net		Renamed flow from "Automatic Project Assignment" to "Automatic Pro" for flow with Unique Name "Automatic_Project_Assignment"	Flows	
27/09/2025, 4:38:05 pm IST	constructioncm@oppla.net		Activated flow with Name "Automatic Project Assignment" and Unique Name "Automatic_Project_Assignment"	Flows	
27/09/2025, 4:34:36 pm IST	constructioncm@oppla.net		Created flow with Name "Automatic Project Assignment" and Unique Name "Automatic_Project_Assignment"	Flows	
27/09/2025, 4:08:18 pm IST	constructioncm@oppla.net		Changed record name of custom object Payment from Payment Name to Name	Custom Objects	
27/09/2025, 4:04:16 pm IST	constructioncm@oppla.net		Changed record name data type of custom object Payment to Text	Custom Objects	
27/09/2025, 3:38:26 pm IST	constructioncm@oppla.net		Removed Accounts validation "Blank_For_Vendor_Account_Number"	Validation Rules	
27/09/2025, 3:30:05 pm IST	constructioncm@oppla.net		Changed field type of GST/Tax ID custom field from Number to Text	Customize Accounts	
27/09/2025, 3:29:28 pm IST	constructioncm@oppla.net		Removed Accounts validation "GST_Required"	Validation Rules	
27/09/2025, 3:29:19 pm IST	constructioncm@oppla.net		Changed active flag for Accounts validation "GST_Required" from 1 to 0	Validation Rules	
27/09/2025, 3:20:18 pm IST	constructioncm@oppla.net		Changed Account page layout Account Layout	Customize Accounts	

Download setup audit trail for last six months (Excel .csv file)