

Phase 9: Reporting, Dashboards & Security Review

Goal:

Monitor bookings, track guest and room details, manage payments, and secure sensitive customer and operational data.

1. Reports

Step 1: Go to Reports

- Click the App Launcher ().
- Search for **Reports** → Click **New Report**.

2. Select Report Type:

1. Step Choose Booking or Guest report type (depending on what you want to analyze).
2. Click Continue.

Step 3: Add Filters

- Date Range:** All Time
- Booking Status:** Confirmed, Cancelled, or Pending (as needed)
- Room Type:** Optionally filter for specific room categories

Step 4: Add Columns

Make sure the following fields are included:

Include:

- Booking Number
- Guest Name
- Room Type
- Booking Amount
- Check-in / Check-out Dates

- Payment Status

Step 5: Group by Claim Type

Drag Room Type or Guest Name into the Group Rows section.

Step 6: Summarize Fraud Score

Hover over Booking Amount → Click ▼ → Summarize → Choose Sum or Average

Step 7: Save the Report

- Click **Save & Run**
 - **Report Name:** Room Type vs Booking Amount Report
 - **Folder:** Hotel Management Reports

	Smart Hotel Bookin...	Accounts	Home	Reports	Service Appointments	Service Resources	Operating Hours	Dashboards	Opportunities	Cases	Bookings	Guests	* More
Report: Bookings with Guest													
	New Bookings with Guest Report	Shows all bookings with guest details	Enable Field Editing	Search	Add Chart	Print	Export	Print	Export	Print	Export	Print	Export
Total Records	Total phone number	2	19,918,950,248										
Room Number	Booking: Booking Name	Guest: Guest Name	Guest Name	Booking: ID	Guest: ID Proof	Check-in Date	Check-out Date	payment Method	phone number				
<input type="checkbox"/> 09 (1)	Test Booking 003	u	shaik yasmin	a0GgK000004yuTF	-	9/25/2025	9/26/2025	Online	9,959,475,124				
Subtotal									9,959,475,124				
<input type="checkbox"/> 98 (1)	Test Booking 002	users	haseena	a0GgK000004yp8b	Passport	9/25/2025	9/26/2025	Card	9,959,475,124				
Subtotal									9,959,475,124				
Total (2)									19,918,950,248				

The screenshot shows the Smart Hotel Booking software interface. At the top, there's a navigation bar with links for Accounts, Home, Reports (which is currently selected), Service Appointments, Service Resources, and Operating Hours. A search bar is also at the top right. The main content area displays a report titled "Report: Bookings Hotel Bookings - Approved & Pending". The report details new hotel bookings with Approved or Pending Approval status and Online payment method. It includes a table with columns for Status, Check-in Date, payment Method, Booking Name, Room Number, and Guest Name. The table shows data for various dates like 9/20/2025, 9/24/2025, 9/25/2025, and 10/1/2025, with subtotals for each date group. At the bottom of the report table, there are checkboxes for Row Counts, Detail Rows, Subtotals, and Grand Total.

<input type="checkbox"/> Status	<input type="checkbox"/> Check-in Date	<input type="checkbox"/> payment Method	<input type="checkbox"/> Booking: Booking Name	<input type="checkbox"/> Room Number	<input type="checkbox"/> Guest Name
<input type="checkbox"/> Completed (4)	9/20/2025 (1)	- (1)	yasmin	7	shaik yasmin
		Subtotal			
	9/24/2025 (1)	- (1)	John Doe – 101	2	muya
		Subtotal			
	9/25/2025 (1)	- (1)	Finance Officer	9	shaik yasmin
		Subtotal			
	10/1/2025 (1)	Cash (1)	Republic Day	8	kjs
		Subtotal			
		Subtotal			
<input type="checkbox"/> In Progress (2)	9/2/2025 (1)	Card (1)	lm	101	kjs,dn x
		Subtotal			
	9/24/2025 (1)	Card (1)	ih	907	vhu

Row Counts Detail Rows Subtotals Grand Total

2. Custom Report Types

- Objects: Booking + Guest + Payment**
- Fields: Booking Number, Guest Name, Room Type, Booking Amount, Payment Status, Housekeeping Notes**
- Summary Reports: Aggregate Booking Amounts by Room Type, Guest, or Date**
- Purpose: Detailed reporting to track bookings, revenue, and operational performance**

SETUP Custom Report Types

Bookings with Guests

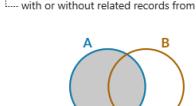
Below is the information for this custom report type. You can click the buttons on this to preview or update information for the custom report type

Preview Layout Edit Layout Clone Delete Close

Details

Display Label	Bookings with Guests
API Name	Bookings_with_Guests
Description	Shows all bookings along with guest details and room info
Created By	Shaik Yasmin, 26/09/2025, 11:02 am
Store in Category	other
Deployment Status	Deployed
Modified By	Shaik Yasmin, 26/09/2025, 11:02 am

Object Relationships

Bookings (A)  with or without related records from Payments (B)



Fields

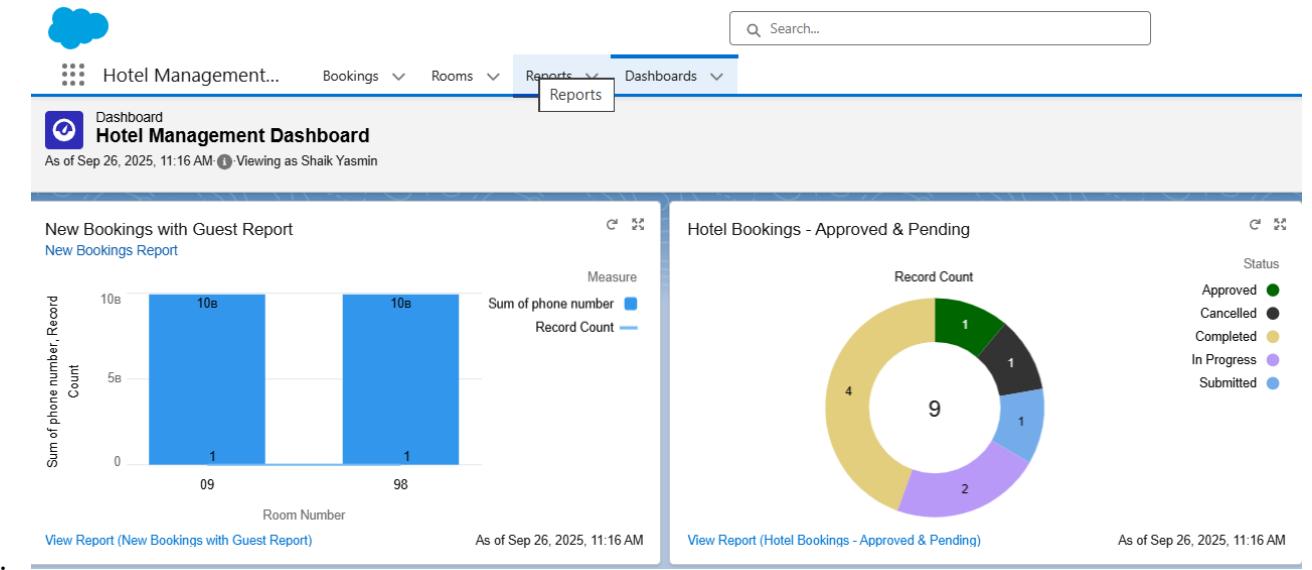
Source Object	Included Fields
Bookings	21
Payments	12

3. Dashboards

Visualize bookings, revenue, and operations:

Steps:

1. Go to **Dashboards** → **New Dashboard**
2. Add components using your custom reports
3. Use chart types like Donut chart for Room Type vs Bookings, Line chart for Revenue trends
4. Apply filters (Time Frame, Room Type, Booking Status)
5. Save and refresh to display live data



4. Sharing Settings

- Bookings & Guests:** Private to assigned staff
- Payments:** Visible only to finance staff
- Housekeeping Notes:** Visible to housekeeping staff only

Booking Sharing Rules		New	Recalculate	Booking Sharing Rules Help
⚠ A sharing rule operation is currently in progress. The initiating user will receive an email when each operation finishes.				
Action	Criteria	Shared With	Access Level	
Edit Del	Booking: 01IgK00002MG6c_00NgK00001t0kd1 EQUALS Approved	Role_Front Desk Agent	Read Only	

5. Field Level Security:

Hide sensitive fields like Guest Contact Info, Payment Details, or ID Proof from junior staff

- Visible only to authorized roles

Steps:

- Setup → Object Manager → Field-Level Security → Adjust visibility per profile

The screenshot shows the 'Field-Level Security for Profile' section for the 'payment Method' field. It lists three profiles: 'Analytics Cloud Integration User', 'Analytics Cloud Security User', and 'Anonymous Interaction'. For each profile, there are two checkboxes: 'Visible' (checked) and 'Read-Only' (unchecked). The 'Visible' checkboxes are checked for all three profiles.

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"/>
Anonymous Interaction	<input checked="" type="checkbox"/>	<input type="checkbox"/>

6. Session Settings

- **Session Timeout:** 2 hrs of inactivity → auto logout.

The screenshot shows the 'Session Settings' page. Under 'Session Timeout', the 'Timeout Value' is set to '2 hours'. Under 'Session Settings', several checkboxes are listed, with the first four checked:

- 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.

7. Login IP Ranges

- Restrict access to office network or VPN for staff

Steps:

- Setup → Profiles → Front Desk / Finance / Housekeeping Profile → Session Settings & Login IP Ranges

The list below contains IP address ranges from sources that your organization trusts. Users logging in to salesforce.com with a browser from trusted networks will be allowed to log in.

Trusted IP Ranges		New
Action	Start IP Address ↑	End IP Address
Edit Del	192.168.1.10	192.168.1.150

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8. Audit Trail

- Track who created, modified, or deleted bookings, payments, and guest records
- Ensures accountability and compliance

Steps:

- Setup → Audit Trail / Field History Tracking → Enable for key objects (Booking, Guest, Payment)

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).					
View Setup Audit Trail					
Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/26/2025, 11:43:50 AM GMT+5:30	shalyasmin057143@agentforce.com		Added Ip AllowList from 192.168.1.10 to 192.168.1.50	Security Controls	
9/26/2025, 11:36:29 AM GMT+5:30	shalyasmin057143@agentforce.com		Changed welcome email template from null to Booking Confirmation Template		
9/26/2025, 11:36:29 AM GMT+5:30	shalyasmin057143@agentforce.com		Session Security Level for Passwordless Login was set to High Assurance	Session Settings	
9/26/2025, 11:36:29 AM GMT+5:30	shalyasmin057143@agentforce.com		Session Security Level for Multi-Factor Authentication was set to High Assurance	Session Settings	
9/26/2025, 11:36:29 AM GMT+5:30	shalyasmin057143@agentforce.com		Session Security Level for Activation was set to Standard	Session Settings	
9/26/2025, 11:36:29 AM GMT+5:30	shalyasmin057143@agentforce.com		Session Security Level for GoogleWorkspaceAuthProvider was set to Standard	Session Settings	
9/26/2025, 11:36:29 AM GMT+5:30	shalyasmin057143@agentforce.com		Session Security Level for Lightning Login was set to Standard	Session Settings	
9/26/2025, 11:36:29 AM GMT+5:30	shalyasmin057143@agentforce.com		Session Security Level for Delegated Authentication was set to Standard	Session Settings	
9/26/2025, 11:36:29 AM GMT+5:30	shalyasmin057143@agentforce.com		Session Security Level for Username Password was set to Standard	Session Settings	
9/26/2025, 11:26:29 AM GMT+5:30	shalyasmin057143@agentforce.com		Completed Criteria Rule Booking recalculations: Approved Bookings Access.	Sharing Rules	
9/26/2025, 11:26:21 AM GMT+5:30	shalyasmin057143@agentforce.com		Initiated Criteria Rule Booking recalculations: Approved Bookings Access.	Sharing Rules	
9/26/2025, 11:26:21 AM GMT+5:30	shalyasmin057143@agentforce.com		Created Booking Criteria-Based Sharing Rule Approved Bookings Access.	Sharing Rules	
9/26/2025, 11:22:10 AM GMT+5:30	shalyasmin057143@agentforce.com		Finished Organization-Wide Defaults update	Sharing Defaults	
9/26/2025, 11:22:08 AM GMT+5:30	shalyasmin057143@agentforce.com		Changed default internal access for Payment from Public Read/Write to Private	Sharing Defaults	
9/26/2025, 11:22:05 AM GMT+5:30	shalyasmin057143@agentforce.com		Changed default internal access for Room from Public Read/Write to Public Read Only	Sharing Defaults	
9/26/2025, 11:22:03 AM GMT+5:30	shalyasmin057143@agentforce.com		Changed default internal access for Booking from Public Read/Write to Private	Sharing Defaults	
9/26/2025, 11:22:02 AM GMT+5:30	shalyasmin057143@agentforce.com		Changed default internal access for Guest from Public Read/Write to Private	Sharing Defaults	
9/26/2025, 11:21:35 AM GMT+5:30	shalyasmin057143@agentforce.com		Started default internal access update for Guest from Public Read/Write to Private	Sharing Defaults	
9/26/2025, 11:21:34 AM GMT+5:30	shalyasmin057143@agentforce.com		Started default internal access update for Room from Public Read/Write to Public Read Only	Sharing Defaults	
9/26/2025, 11:21:34 AM GMT+5:30	shalyasmin057143@agentforce.com		Started default internal access update for Booking from Public Read/Write to Private	Sharing Defaults	

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A	B	C	D	E
Date	User	Source	Action	Section
9/26/2025	shaikyasmin057143@agentforce.com		Added Ip AllowList from 192.168.1.10 to 192.168.1.5 Security Controls	
9/26/2025	shaikyasmin057143@agentforce.com		Changed welcome email template from null to Booking Confirmation	
9/26/2025	shaikyasmin057143@agentforce.com		Session Security Level for Passwordless Login was set to Session Settings	
9/26/2025	shaikyasmin057143@agentforce.com		Session Security Level for Multi-Factor Authentication Session Settings	
9/26/2025	shaikyasmin057143@agentforce.com		Session Security Level for Activation was set to Standard Session Settings	
9/26/2025	shaikyasmin057143@agentforce.com		Session Security Level for Google Workspace Auth Pro Session Settings	
9/26/2025	shaikyasmin057143@agentforce.com		Session Security Level for Lightning Login was set to Standard Session Settings	
9/26/2025	shaikyasmin057143@agentforce.com		Session Security Level for Delegated Authentication Session Settings	
9/26/2025	shaikyasmin057143@agentforce.com		Session Security Level for Username Password was set to Session Settings	
9/26/2025	shaikyasmin057143@agentforce.com		Completed Criteria Rule: Booking recalculation: Approval Sharing Rules	
9/26/2025	shaikyasmin057143@agentforce.com		Initiated Criteria Rule: Booking recalculation: Approval Sharing Rules	
9/26/2025	shaikyasmin057143@agentforce.com		Created Booking Criteria-Based Sharing Rule Approval Sharing Rules	
9/26/2025	shaikyasmin057143@agentforce.com		Finished Organization-Wide Defaults update Sharing Defaults	
9/26/2025	shaikyasmin057143@agentforce.com		Changed default internal access for Payment from Public Sharing Defaults	
9/26/2025	shaikyasmin057143@agentforce.com		Changed default internal access for Room from Public Sharing Defaults	
9/26/2025	shaikyasmin057143@agentforce.com		Changed default internal access for Booking from Public Sharing Defaults	
9/26/2025	shaikyasmin057143@agentforce.com		Changed default internal access for Guest from Public Sharing Defaults	
9/26/2025	shaikyasmin057143@agentforce.com		Started default internal access update for Guest from Sharing Defaults	
9/26/2025	shaikyasmin057143@agentforce.com		Started default internal access update for Room from Sharing Defaults	
9/26/2025	shaikyasmin057143@agentforce.com		Started default internal access update for Booking from Sharing Defaults	
9/26/2025	shaikyasmin057143@agentforce.com		Started default internal access update for Payment from Sharing Defaults	
9/26/2025	shaikyasmin057143@agentforce.com		Started Organization-Wide Defaults update Sharing Defaults	
9/26/2025	shaikyasmin057143@agentforce.com		Requested an export Data Export	
9/26/2025	shaikyasmin057143@agentforce.com		For the 01lgK000002MGOL duplicate rule Prevent_Duplicate_Rule	
9/26/2025	shaikyasmin057143@agentforce.com		For duplicate rule Prevent_Duplicate_Rooms, change Duplicate Rule	
9/26/2025	shaikyasmin057143@agentforce.com		For duplicate rule Prevent_Duplicate_Rooms, change Duplicate Rule	
9/26/2025	shaikyasmin057143@agentforce.com		Created new 01lgK000002MGOL duplicate rule "Prev_Duplicate_Rule"	
			+	
<	>		SetupAuditTrail1758867363744	