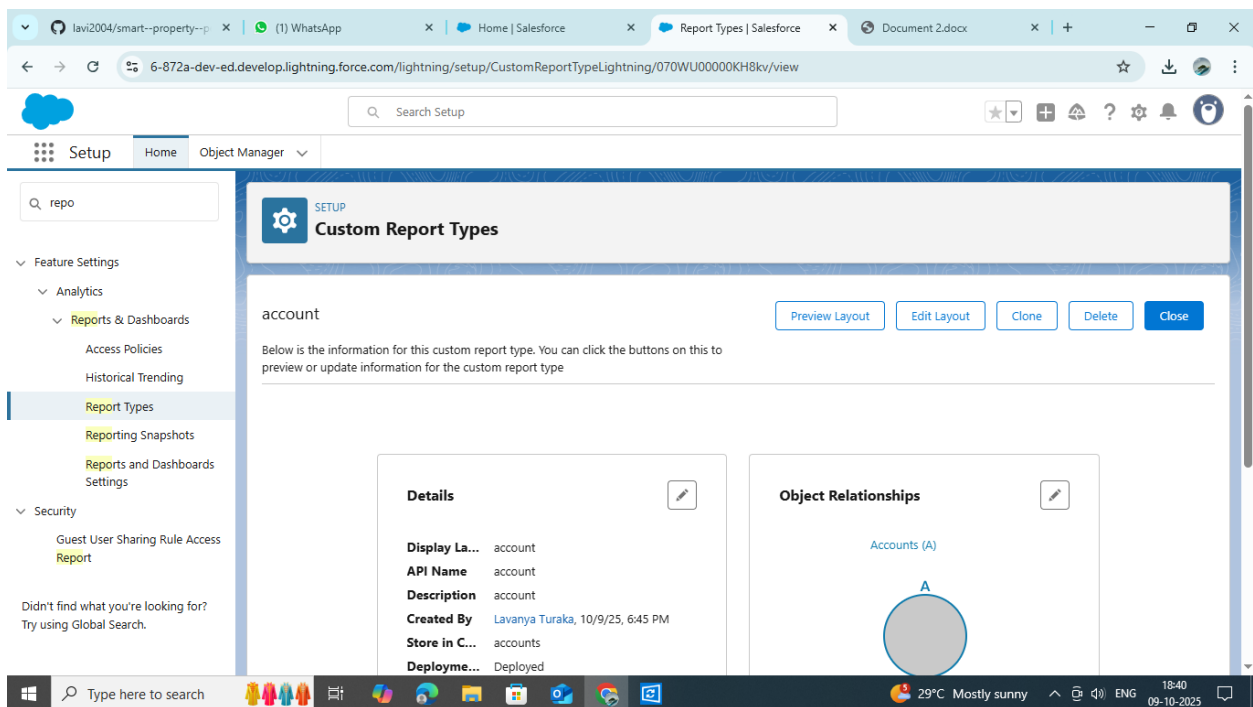


Phase 9: Reporting, Dashboards & Security Review

1. Reports

Salesforce allows you to create various types of reports to analyze

1. Go to Reports
2. Select the Report Type (Accounts, Contacts, Leads, Opportunities, etc.)
3. Add Filters to show relevant data
4. Add Filters to show relevant data
5. Save & Run the report



2. Dashboards

Dashboards visualize reports in charts and graphs.

Steps:

1. Go to Dashboards
2. Add Components (charts, tables, metrics) linked to report
3. Customize layout and display options
4. Save and share with users or groups
5. Optionally, create Dynamic Dashboards to show data based on the logged-in user

Step 3: Review Security Settings

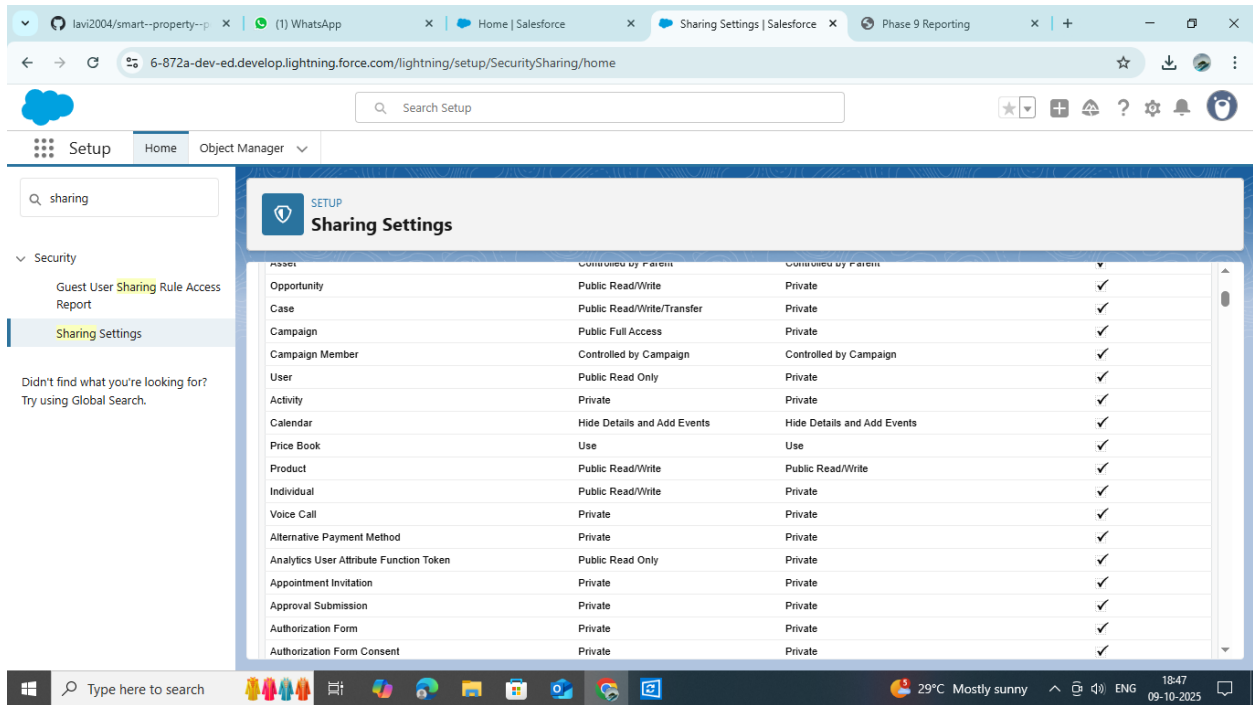
Set up Profiles and Permission Sets to control user access to objects and fields.

Configure Sharing Settings (Org-wide defaults, Role Hierarchy, Sharing Rules) to manage data visibility.

Verify Login Access, Session Settings, and IP restrictions.

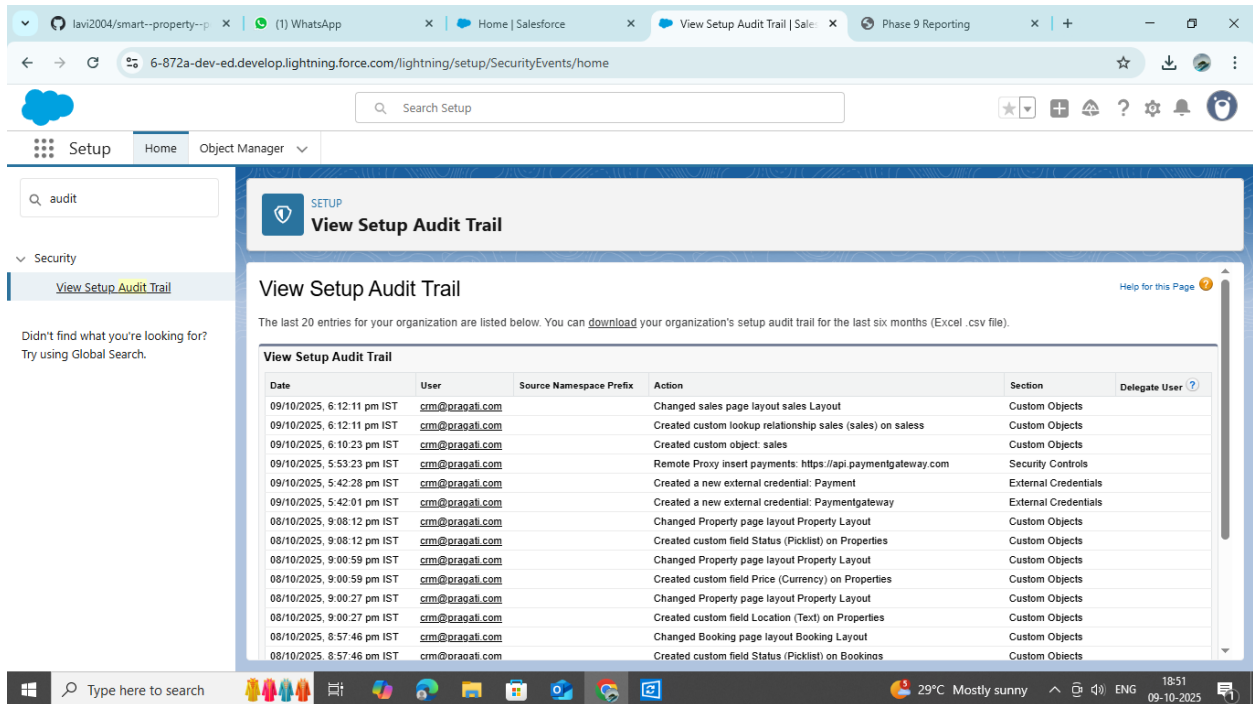
Use Audit Trail to track configuration changes and user activities.

May create by the action of main user of the page as crm



The screenshot shows the Salesforce Sharing Settings page. The left sidebar contains a search bar with "sharing" and a list of security-related items, including "Guest User Sharing Rule Access Report" and "Sharing Settings". The main content area is titled "Sharing Settings" and displays a table of sharing rules for various objects.

Object	Controlled by Parent	Controlled by Parent	
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓
Individual	Public Read/Write	Private	✓
Voice Call	Private	Private	✓
Alternative Payment Method	Private	Private	✓
Analytics User Attribute Function Token	Public Read Only	Private	✓
Appointment Invitation	Private	Private	✓
Approval Submission	Private	Private	✓
Authorization Form	Private	Private	✓
Authorization Form Consent	Private	Private	✓



The screenshot shows the Salesforce View Setup Audit Trail page. The left sidebar contains a search bar with "audit" and a list of security-related items, including "View Setup Audit Trail". The main content area is titled "View Setup Audit Trail" and displays a table of setup audit trail entries.

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
09/10/2025, 6:12:11 pm IST	crm@oragati.com		Changed sales page layout sales Layout	Custom Objects	
09/10/2025, 6:12:11 pm IST	crm@oragati.com		Created custom lookup relationship sales (sales) on sales	Custom Objects	
09/10/2025, 6:10:23 pm IST	crm@oragati.com		Created custom object: sales	Custom Objects	
09/10/2025, 5:53:23 pm IST	crm@oragati.com		Remote Proxy insert payments: https://api.paymentgateway.com	Security Controls	
09/10/2025, 5:42:28 pm IST	crm@oragati.com		Created a new external credential: Payment	External Credentials	
09/10/2025, 5:42:01 pm IST	crm@oragati.com		Created a new external credential: Paymentgateway	External Credentials	
08/10/2025, 9:08:12 pm IST	crm@oragati.com		Changed Property page layout Property Layout	Custom Objects	
08/10/2025, 9:08:12 pm IST	crm@oragati.com		Created custom field Status (Picklist) on Properties	Custom Objects	
08/10/2025, 9:00:59 pm IST	crm@oragati.com		Changed Property page layout Property Layout	Custom Objects	
08/10/2025, 9:00:59 pm IST	crm@oragati.com		Created custom field Price (Currency) on Properties	Custom Objects	
08/10/2025, 9:00:27 pm IST	crm@oragati.com		Changed Property page layout Property Layout	Custom Objects	
08/10/2025, 9:00:27 pm IST	crm@oragati.com		Created custom field Location (Text) on Properties	Custom Objects	
08/10/2025, 8:57:46 pm IST	crm@oragati.com		Changed Booking page layout Booking Layout	Custom Objects	
08/10/2025, 8:57:46 pm IST	crm@oragati.com		Created custom field Status (Picklist) on Bookings	Custom Objects	

4. Deliverables

List of Reports and Dashboards with descriptions

Security Review Document (Permission Sets)

Audit Trail Summary

The screenshot shows the Salesforce Setup interface for Custom Report Types. The browser address bar displays the URL: `6-872a-dev-ed.develop.lightning.force.com/lightning/setup/CustomReportTypeLightning/070WU00000KH18H/view`. The left sidebar shows the navigation menu with 'Reports & Dashboards' selected. The main content area displays the 'Custom Report Types' page for a 'lead' report type. A green notification banner at the top states 'Report type lead was created.' The page includes buttons for 'Preview Layout', 'Edit Layout', 'Clone', 'Delete', and 'Close'. Below these buttons, the 'Details' section lists the following information:

Field	Value
Display Name	lead
API Name	lead
Description	lead
Created By	Lavanya Turaka, 10/9/25, 7:01 PM
Store in Cloud	leads
Deployment Status	Deployed

The 'Object Relationships' section shows a diagram with 'Leads (A)' and a circular relationship icon.

The screenshot shows the Salesforce Setup interface for Permission Sets. The browser address bar displays the URL: `6-872a-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PSWU00000JGRv7/summary`. The left sidebar shows the navigation menu with 'Users' selected. The main content area displays the 'Permission Sets' page for a 'CRM User' permission set. The page includes a table with the following information:

Field	Value
API Name	CRMUserPsi
License	CRM User
Created By	salesforce.com, inc.
Last Modified By	salesforce.com, inc.
Namespace Prefix	force
Session Activation Required	Not Required
Created Date	25/09/2025, 3:48 am
Last Modified Date	25/09/2025, 10:23 am
Related Permission Set Groups	0
Assigned Users	0

The 'Description' section states: 'Denotes that the user is a Sales Cloud or Service Cloud user.'

The 'Permission Set Information' section includes a tabbed interface with 'User Permissions' selected. The tabs are: 'Related Permission Set Groups', 'User Permissions', 'Object Permissions', 'Field Permissions', 'Custom Permissions', and 'Tabs'.