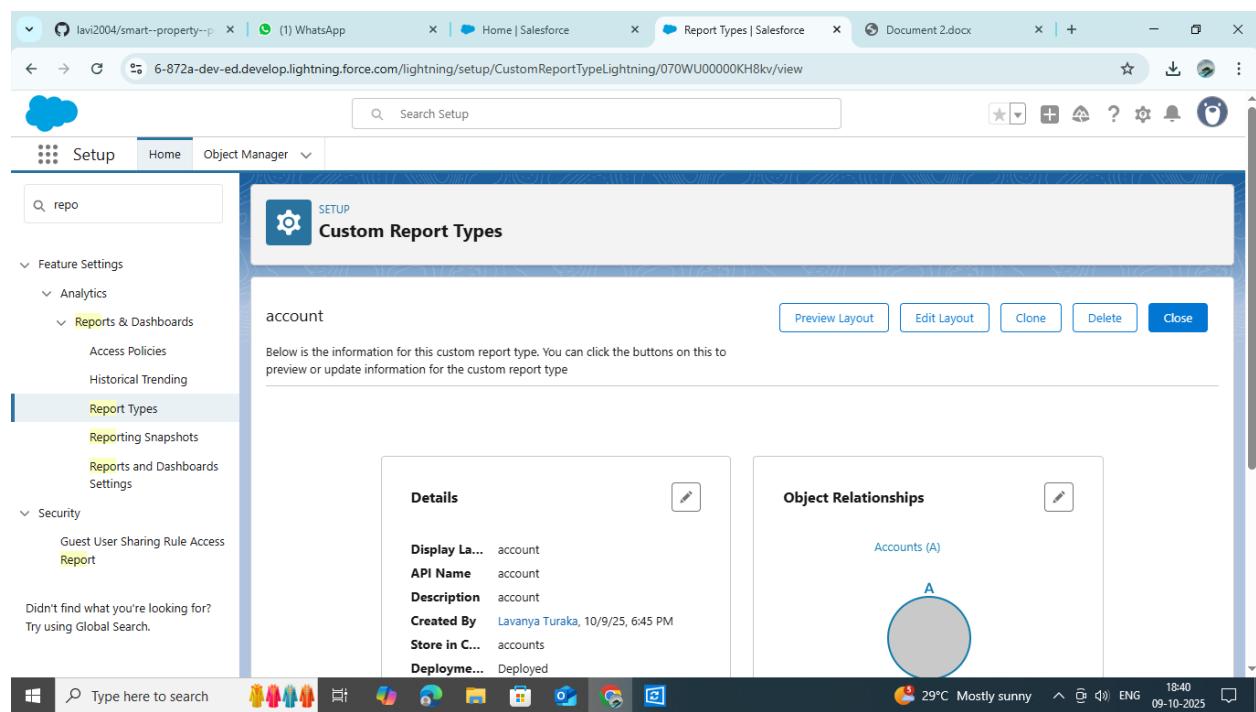


## Phase 9: Reporting, Dashboards & Security Review

### 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.)
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.

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The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The left sidebar has 'Sharing Settings' selected under 'Security'. The main area displays a table of objects and their sharing rules:

Object	Controlled by Parent	Controlled by Child
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 'View Setup Audit Trail' page in the Salesforce Setup. The left sidebar has 'View Setup Audit Trail' selected under 'Security'. The main area displays a table of audit entries:

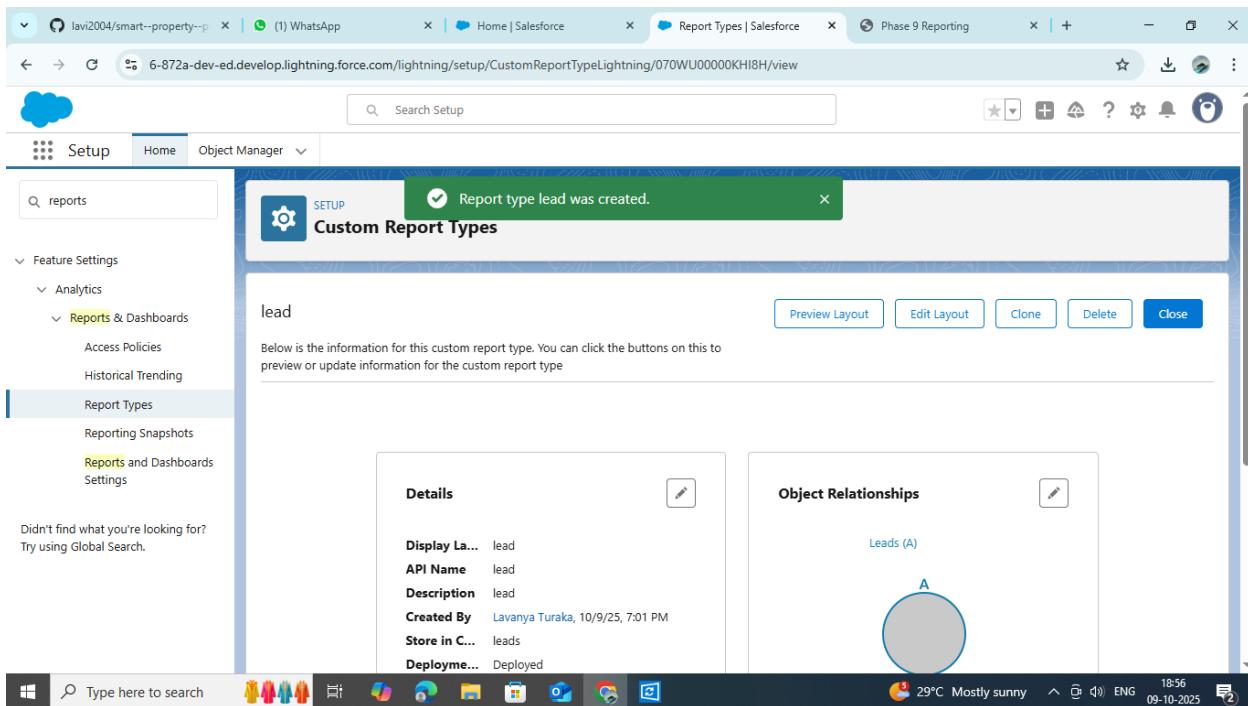
Date	User	Source Namespace Prefix	Action	Section	Delegate User
09/10/2025, 6:12:11 pm IST	crm@pragati.com		Changed sales page layout sales Layout	Custom Objects	
09/10/2025, 6:12:11 pm IST	crm@pragati.com		Created custom lookup relationship sales (sales) on sales	Custom Objects	
09/10/2025, 6:10:23 pm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

## 4. Deliverables

### List of Reports and Dashboards with descriptions

# Security Review Document (Permission Sets)

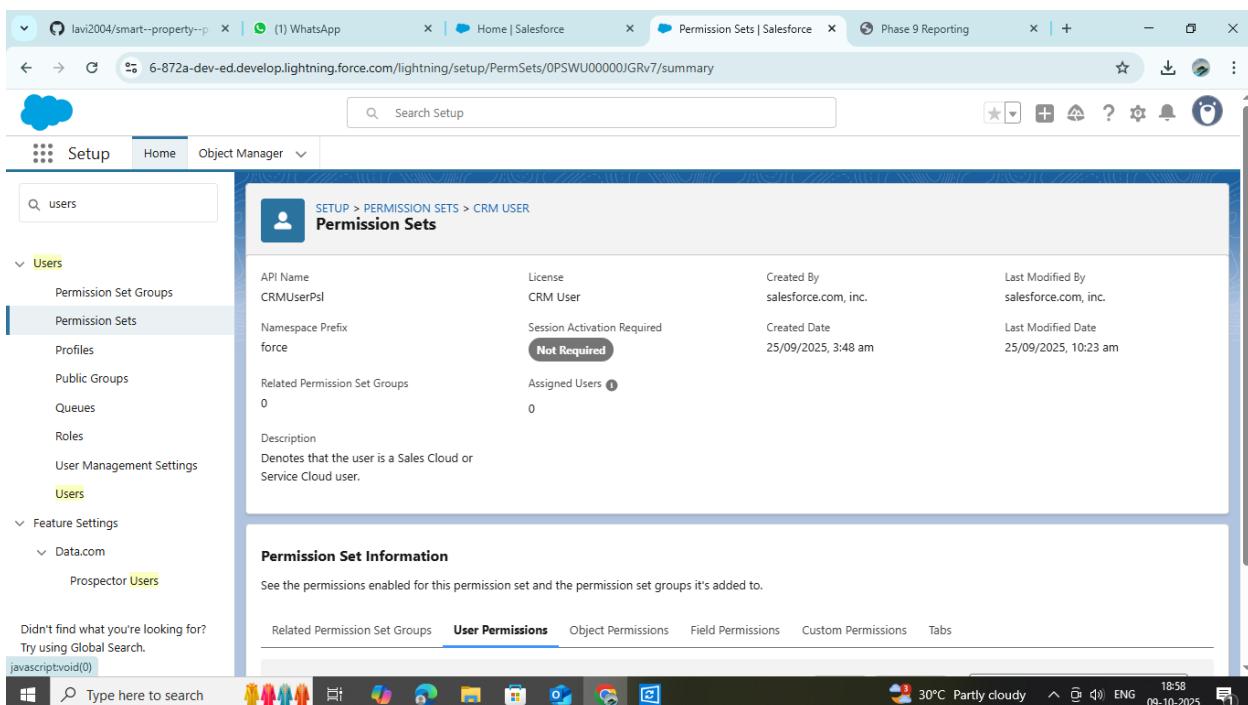
## Audit Trail Summary



The screenshot shows the Salesforce Setup interface. A success message at the top right says "Report type lead was created." The page title is "Custom Report Types". The report type is named "lead". The "Details" section shows the following fields:

Display La...	lead
API Name	lead
Description	lead
Created By	Lavanya Turaka, 10/9/25, 7:01 PM
Store in C...	leads
Deployment...	Deployed

The "Object Relationships" section shows a relationship to "Leads (A)".

The screenshot shows the Salesforce Setup interface under "Permission Sets". A permission set named "CRMUserPsl" is selected. The "Permission Set Information" section shows the following details:

API Name	CRMUserPsl	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" field states: "Denotes that the user is a Sales Cloud or Service Cloud user."

The "User Permissions" tab is selected in the navigation bar.