Phase 9: Reporting, Dashboards & Security Review

1. Reports (Tabular, Summary, Matrix, Joined)

- **Report Formats** – Salesforce supports 4 report types: **Tabular** (simple list), **Summary** (grouped rows), **Matrix** (grouped by rows & columns), and **Joined** (multiple report blocks).

- **Project Usage** – In my project, **Summary Reports** were mainly used to group shipments by **Driver** or **Status**, while **Matrix Reports** helped compare shipments by **Status (rows)** vs **Destination (columns)** for logistics insights.

2. Report Types

- **Custom Report Type Creation** – A custom report type *Shipment Reports* was created with **Shipments** as the primary object and **Activities** as the related object. This allows analyzing shipments along with related activities like follow-ups or communications.

- **Flexibility in Reporting** – By including fields such as **Status, Assigned Driver, Last Checkpoint, and Dates**, the custom report type ensures that stakeholders can generate **tailored reports** beyond the standard Salesforce report options.

Details

Display Label	Shipment Reports
API Name	Shipment_Reports
Description	Report type for analyzing shipments by Status, Assigned Driver, Last Checkpoint, and Dates
Created By	Shrawani Gongshe, 9/25/25, 2:16 PM
Store in Cate...	other
Deployment ...	In Development
Modified By	Shrawani Gongshe, 9/25/25, 8:19 PM

Object Relationships

Shipments (A)

with at least one related record from Activities (B)

Fields

Source Object	Included Fields
Shipments	27
Activities	0

Report Name	∨	Description	∨	Folder	∨	Created By	∨	Created On	∨	Subscribed	
Checkpoints Report				checkpoint		Shrawani Gongshe		9/25/2025, 8:53 AM			▾
destination report				dashboard		Shrawani Gongshe		9/25/2025, 8:41 AM			▾
Shipments Report				Public Reports		Shrawani Gongshe		9/24/2025, 10:11 PM			▾
Sample Flow Report: Screen Flows		Which flows run, what's the status of each interview, and how long do users take to complete the screens?		Public Reports		Automated Process		9/14/2025, 5:19 AM			▾
Shipments Report				Private Reports		Shrawani Gongshe		9/25/2025, 1:28 AM			▾

3. Dashboards

• **Comprehensive Logistics Dashboard** – Combines shipment status, checkpoint progress, driver allocation, and destination trends into a single view for end-to-end tracking.

• **Data-driven Insights** – Helps logistics managers analyze shipment distribution by checkpoints, assigned drivers, and destinations, enabling efficient resource planning and monitoring.
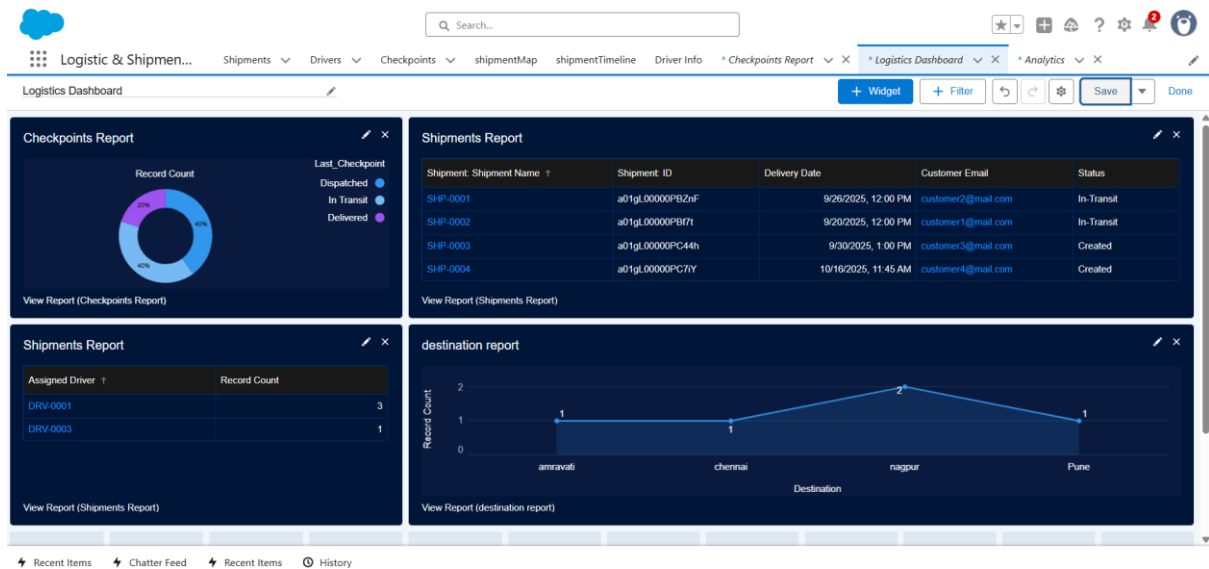
4. Dynamic Dashboards

Future Enhancement – Currently, a standard dashboard is implemented. In the future, we can configure **Dynamic Dashboards** so each user (Driver, Manager, Admin) views shipment and checkpoint data relevant to their role.**Benefit** – This will **eliminate theneed for multiple dashboards**, reduce maintenance, and provide **personalized insights** for different stakeholders in the logistics system.
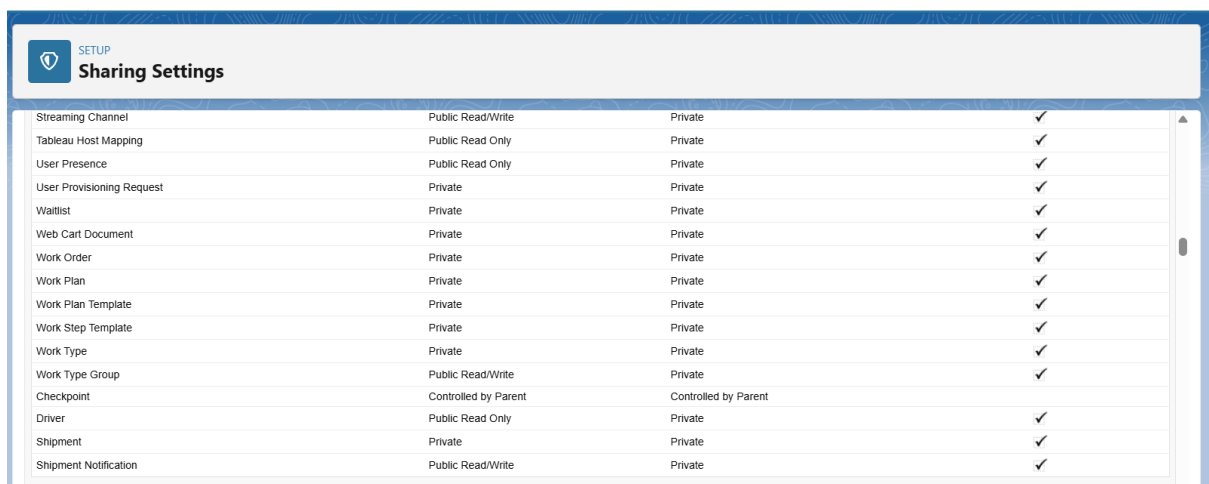
5. Sharing Settings

- **Access Control**

  - `Shipment`, `Checkpoint`, and `Driver` objects have **Private** sharing by default, ensuring only record owners or users with higher role hierarchy can access the records.
  - `Shipment Notification` is **Public Read/Write**, allowing all users to view and update notifications, which helps collaboration and tracking.

- **Data Security vs Collaboration**

  - **Private model** for critical logistics objects (Shipment, Driver, Checkpoint) enforces stronger **data confidentiality** and prevents unauthorized access.
  - **Public Read/Write** on Shipment Notifications balances openness by enabling teams to **easily communicate and track shipment updates** without restrictions.

SETUP
Sharing Settings

Streaming Channel	Public Read/Write	Private	✓
Tableau Host Mapping	Public Read Only	Private	✓
User Presence	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	✓
Checkpoint	Controlled by Parent	Controlled by Parent	
Driver	Public Read Only	Private	✓
Shipment	Private	Private	✓
Shipment Notification	Public Read/Write	Private	✓

6. Field Level Security

- **Operations/Dispatch Profiles** → *Custom: Sales Profile*, *Driver Profile*, *Logistics Manager Profile* should have **Read/Write** access to update shipment progress.
- **Support & View-Only Profiles** → *Custom: Support Profile*, *Contract Manager*, *Analytics Users* should have **Read-Only** access so they can monitor shipment status but not modify it.

7. Session Settings

- **High Assurance Login Enforcement** → Configured Multi-Factor Authentication (MFA) as a high-assurance method, ensuring sensitive operations (like shipment updates) require strong user authentication.

- **User Session Management** → Session settings allow control over login/logout behavior, including session timeout, logout page redirects, and secure handling of authentication methods.
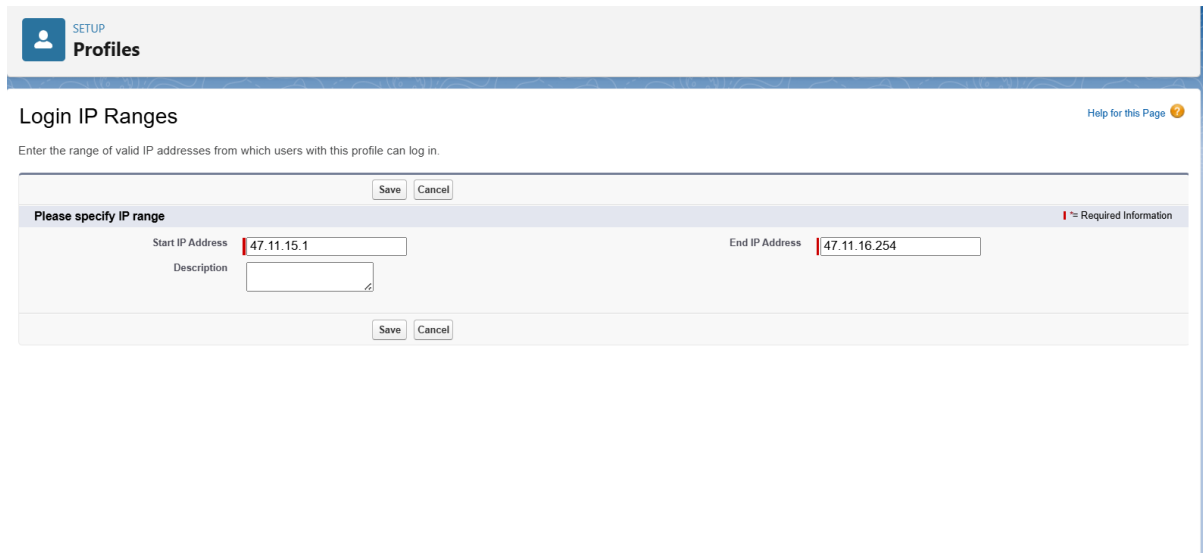
8. Login IP Ranges

- **Restricted Access by Network** → Configured IP ranges (47.11.15.1 – 47.11.16.254) to ensure only users logging in from trusted corporate networks can access Salesforce.
- **Enhanced Data Security** → Prevents unauthorized access attempts from unknown or untrusted IP addresses, adding an extra layer of protection for shipment and driver data.

9. Audit Trail

- • **Track Admin Changes** → Audit Trail logs the last 20 setup/configuration changes (who made them and when). This helps monitor critical changes like profile updates, field-level security, or session/IP settings.
- • **Governance & Compliance** → Ensures accountability by recording all admin actions, supporting compliance with internal IT and data security policies.