

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

Fields

Source Object	Included Fields
Shipments	27
Activities	0

Object Relationships

Shipments (A)

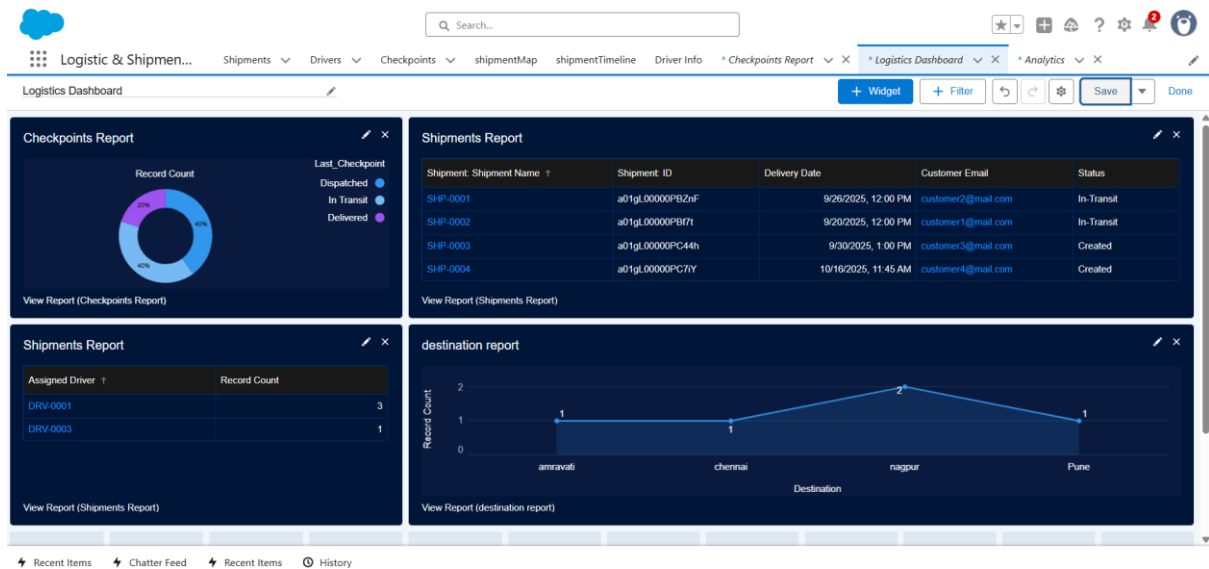
with at least one related record from Activities (B)

A Venn diagram with two overlapping circles, A (blue) and B (orange). The intersection of A and B is shaded gray. Below the diagram is a small table icon with two columns labeled A and B, each containing several horizontal bars representing data rows.

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 the need for multiple dashboards**, reduce maintenance, and provide **personalized insights** for different stakeholders in the logistics system.

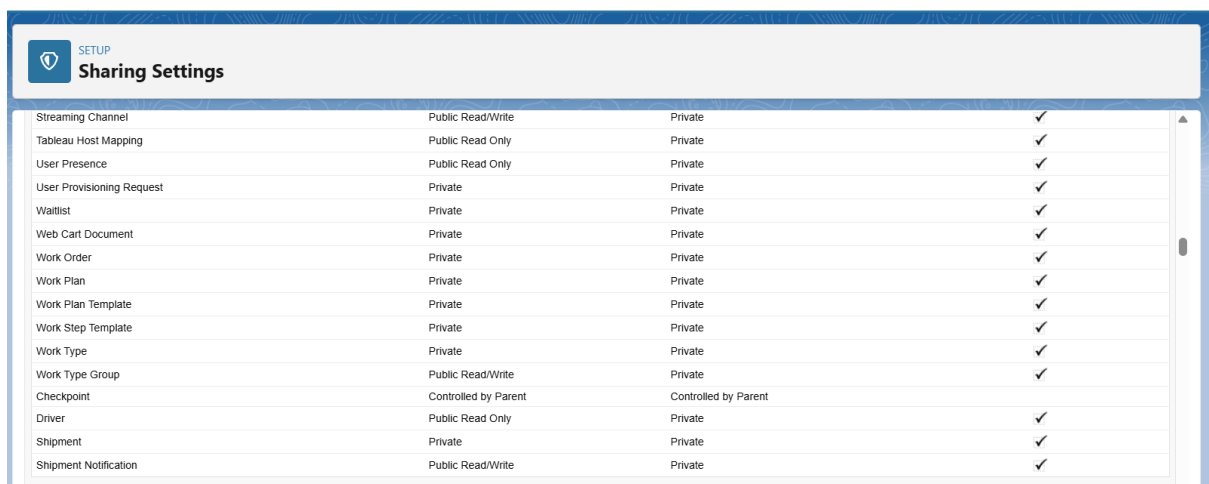
5. Sharing Settings

- **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.




The screenshot shows a 'Sharing Settings' table with columns for object names, their sharing settings, and a confirmation column. The table lists various objects and their default sharing permissions.

Object	Sharing Setting	Parent Setting	Confirmation
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.


SETUP


Set Field-Level Security
Status
Help for this Page

SaveCancel

Field Label	Status
Data Type	Picklist
Field-Level Security for Profile	
Analytics Cloud Integration User	<input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/> Read-Only
Analytics Cloud Security User	<input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/> Read-Only
Anypoint Integration	<input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/> Read-Only
Contract Manager	<input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/> Read-Only
Cross Org Data Proxy User	<input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/> Read-Only
Custom: Marketing Profile	<input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/> Read-Only
Custom: Sales Profile	<input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/> Read-Only
Custom: Support Profile	<input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/> Read-Only
Driver Profile	<input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/> Read-Only
Einstein Agent User	<input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/> Read-Only

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.


SETUP

Session Settings

Standard

Username Password
Delegated Authentication
Activation
Lightning Login
Passwordless Login

Add
Remove

High Assurance

Multi-Factor Authentication

Logout Page Settings

Logout URL

☐ Store the redirect logout URL in your local browser

New User Welcome Email Settings

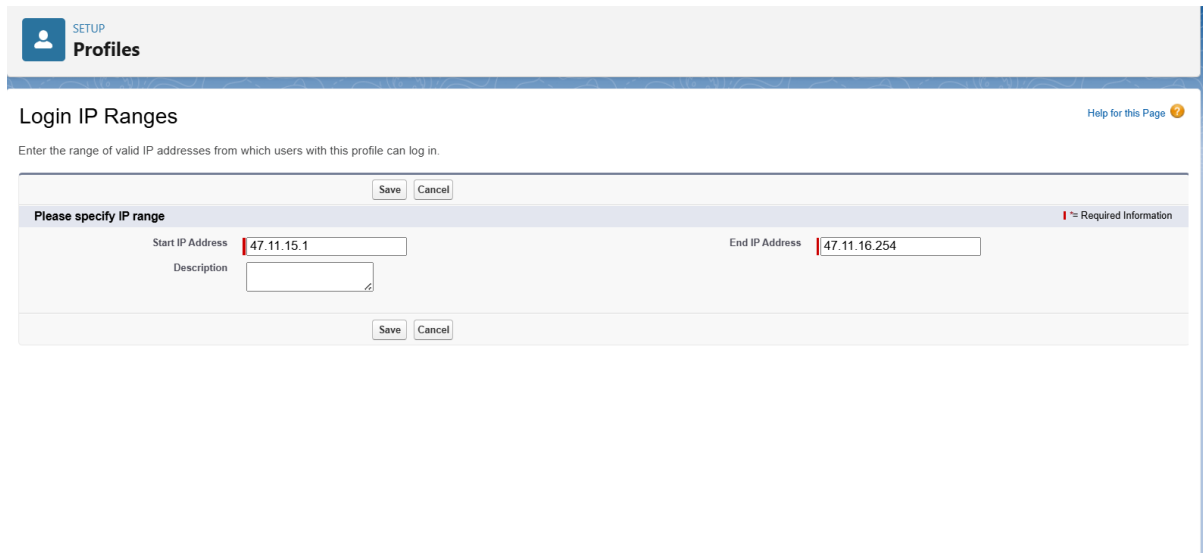
Link expires in
7 days

Welcome Email Template

SaveCancel

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.



The screenshot shows the 'Setup Profiles' page in Salesforce. The 'Login IP Ranges' section is active, displaying a form to configure IP ranges for a specific profile. The form includes fields for 'Start IP Address' (47.11.15.1) and 'End IP Address' (47.11.16.254), both marked as required information. A 'Description' field is also present. The page has 'Save' and 'Cancel' buttons at the top and bottom of the form area. A 'Help for this Page' link is visible in the top right corner.

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.