Guest360 CRM Project – Phase 9: Reporting, Dashboards & Security Review

This document explains Phase 9 (Reporting, Dashboards & Security Review) of the Guest360 CRM Project. It provides step-by-step click instructions with screenshot placeholders.
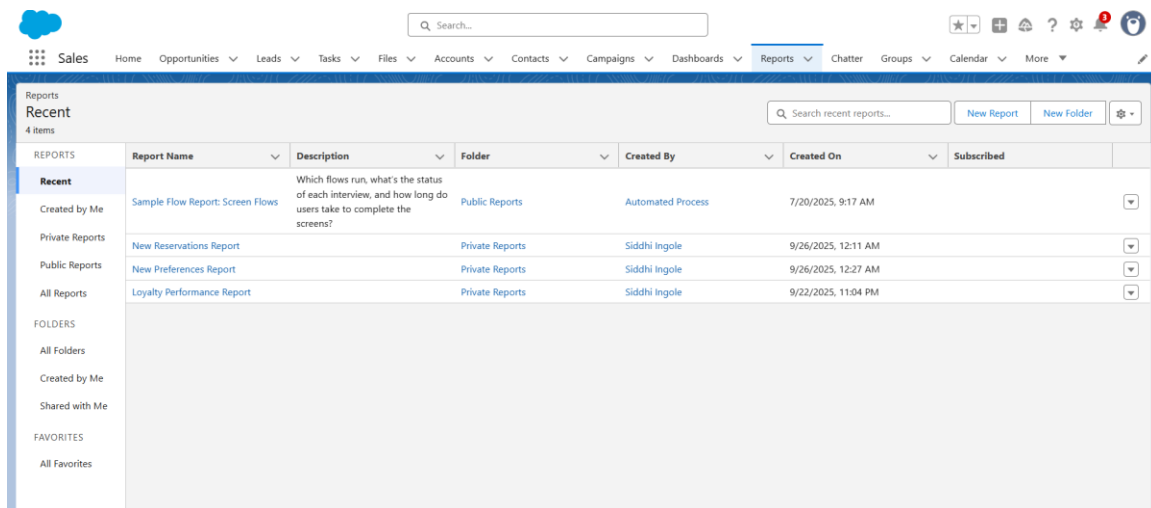
Step 1: Reports

Path: App Launcher → Reports → New Report

Steps:

1. Click New Report.

2. Select report type:

  - Reservations with Guest Profiles (for Repeat Guests).

  - Preferences with Guest Profiles (for Preferences).

3. Continue.

4. Add filters

Save & Run → Name report accordingly.

Step 2: Dashboards

Path: App Launcher → Dashboards → New Dashboard

Steps:

1. Click New Dashboard → Name: Guest Loyalty Dashboard.

2. Choose folder (Private or Public).

3. In Dashboard Builder → click + Component.

4. Pick a Report (Repeat Guests, Preferences).

5. Choose chart type:

   - Loyalty Performance.

   - Guest Preferences.

   - NPS Trend.

6. Add → Save → Done.
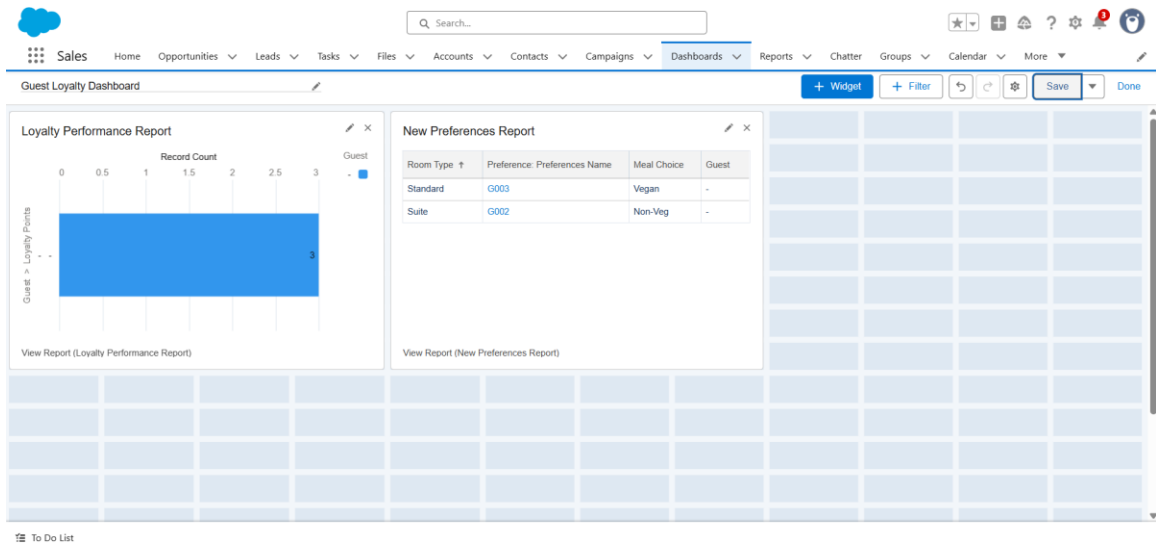
Step 3: Security Review

A. Field-Level Security (FLS)

1. Setup → Object Manager → Guest Profile → Fields & Relationships.

2. Open a field (e.g., Loyalty, VIP).

3. Click Set Field-Level Security.

4. Restrict sensitive fields to appropriate profiles only.

5. Save.

B. Audit Trail

1. Setup → Quick Find → View Setup Audit Trail.

2. Review recent

C. IP Ranges

1. Setup → Profiles → Open a profile (e.g., System Administrator).