

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.

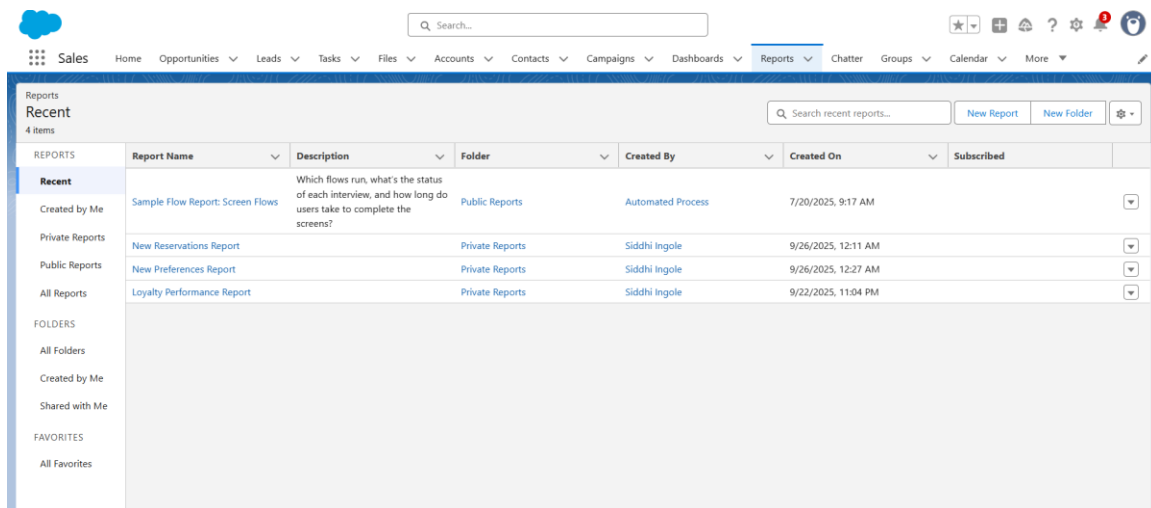
Step 1: Reports

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.



The screenshot displays the Salesforce Reports interface. At the top, there is a navigation bar with various tabs including Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports (selected), Chatter, Groups, Calendar, and More. A search bar is located in the top right corner. Below the navigation bar, the 'Reports' section is active, showing a list of recent reports. The list includes a search bar, 'New Report', and 'New Folder' buttons. The reports are organized into a table with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The 'Recent' section lists four reports: 'Sample Flow Report: Screen Flows' (Public Reports, Automated Process, 7/20/2025, 9:17 AM), 'New Reservations Report' (Private Reports, Siddhi Ingole, 9/26/2025, 12:11 AM), 'New Preferences Report' (Private Reports, Siddhi Ingole, 9/26/2025, 12:27 AM), and 'Loyalty Performance Report' (Private Reports, Siddhi Ingole, 9/22/2025, 11:04 PM). On the left side, there are sections for 'FOLDERS' (All Folders, Created by Me, Shared with Me) and 'FAVORITES' (All Favorites).

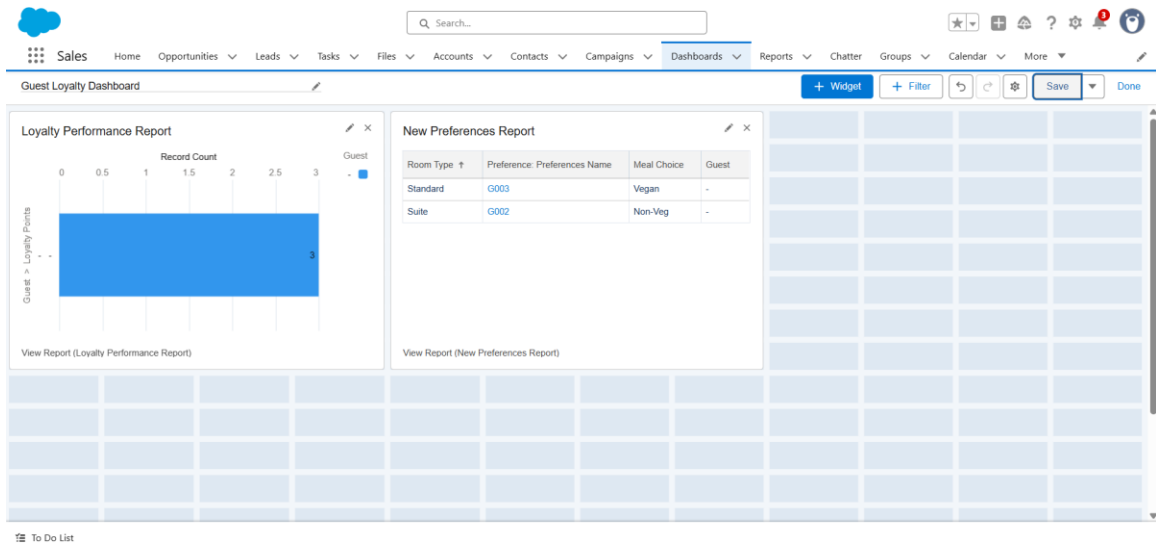
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	7/20/2025, 9:17 AM	
Created by Me						
Private Reports	New Reservations Report		Private Reports	Siddhi Ingole	9/26/2025, 12:11 AM	
Public Reports	New Preferences Report		Private Reports	Siddhi Ingole	9/26/2025, 12:27 AM	
All Reports	Loyalty Performance Report		Private Reports	Siddhi Ingole	9/22/2025, 11:04 PM	

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.

The screenshot displays the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. A search bar labeled 'Search Setup' is on the right. Below the navigation bar, the breadcrumb trail reads 'SETUP > OBJECT MANAGER > Guest Profile'. The main content area is titled 'Guest Profile' and shows the 'Fields & Relationships' section. On the left, a sidebar lists various setup options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, and Object Access. The main area shows the 'VIP' custom field. It includes a 'Back to Guest Profile' link and a 'Validation Rules (0)' link. The 'Custom Field Definition Detail' section has tabs for 'Edit', 'Set Field-Level Security' (selected), 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table lists details for the 'VIP' field: Field Label (VIP), Field Name (VIP), API Name (VIP__c), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. It also shows 'Created By' and 'Modified By' as 'Siddhi Inagade' on 9/19/2025 at 3:14 AM. The 'General Options' section shows 'Default Value' as 'Unchecked'. The 'Field Dependencies' section indicates 'No dependencies defined'.

Field Information	
Field Label	VIP
Field Name	VIP
API Name	VIP__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Siddhi Inagade, 9/19/2025, 3:14 AM
Modified By	Siddhi Inagade, 9/19/2025, 3:14 AM

General Options	
Default Value	Unchecked

Field Dependencies	
No dependencies defined.	

B. Audit Trail

1. Setup → Quick Find → View Setup Audit Trail.
2. Review recent

Setup

Home

Object Manager

Security

View Setup Audit Trail

Didn't find what you're looking for?
Try using Global Search.

View Setup Audit Trail

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
9/25/2025, 10:55:08 AM PDT	ingolesidhi@37@agentforce.com		Guest Profile matching rule, GuestProfile_DuplicateCheck matching rule, activating by Siddhi Ingole	Matching Rule	
9/25/2025, 10:55:04 AM PDT	ingolesidhi@37@agentforce.com		For matching rule GuestProfile_DuplicateCheck matching rule, added matching criteria where matching method is Exact, the field is Guest_ID and match blank fields is "Match When Both Blank"	Matching Rule	
9/25/2025, 10:55:04 AM PDT	ingolesidhi@37@agentforce.com		For matching rule GuestProfile_DuplicateCheck matching rule, added matching criteria where matching method is Exact, the field is Email and match blank fields is "Match When Both Blank"	Matching Rule	
9/25/2025, 10:55:04 AM PDT	ingolesidhi@37@agentforce.com		For matching rule GuestProfile_DuplicateCheck matching rule, deleted matching criteria where matching method is Exact and field is Guest_ID	Matching Rule	
9/25/2025, 10:55:04 AM PDT	ingolesidhi@37@agentforce.com		For matching rule GuestProfile_DuplicateCheck matching rule, deleted matching criteria where matching method is Exact and field is Email	Matching Rule	
9/25/2025, 10:54:42 AM PDT	ingolesidhi@37@agentforce.com		For matching rule GuestProfile_DuplicateCheck matching rule, added matching criteria where matching method is Exact, the field is Guest_ID and match blank fields is "Match When Both Blank"	Matching Rule	
9/25/2025, 10:54:42 AM PDT	ingolesidhi@37@agentforce.com		For matching rule GuestProfile_DuplicateCheck matching rule, added matching criteria where matching method is Exact, the field is Email and match blank fields is "Match When Both Blank"	Matching Rule	
9/25/2025, 10:54:42 AM PDT	ingolesidhi@37@agentforce.com		For matching rule GuestProfile_DuplicateCheck matching rule, matching engine set to Exact Match Engine.	Matching Rule	
9/25/2025, 10:54:42 AM PDT	ingolesidhi@37@agentforce.com		Created new Guest Profile matching rule GuestProfile_DuplicateCheck matching rule	Matching Rule	
9/25/2025, 10:54:03 AM PDT	ingolesidhi@37@agentforce.com		Created new 01gk000002MM58 duplicate rule "GuestProfile_DuplicateCheck". Set "Record-Level Security" to "Enforce sharing rules"	Duplicate Rule	
9/25/2025, 10:39:06 AM PDT	ingolesidhi@37@agentforce.com		Requested an export	Data Export	

C. IP Ranges

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