

# Phase 9 – Reporting, Dashboards & Security Review (Ashok Motors Capstone)

## Objective:

Provide meaningful insights through reports and dashboards while ensuring proper security, sharing settings, and audit trails for Ashok Motors Dev Org.

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## 1. Reports

- **Purpose:** Summarize and analyze Salesforce data.
- **Examples:**
  - **AM\_Service\_Status.** =Tracks the status of all customer service requests (open, in-progress, closed) to monitor resolution efficiency.
  - **AM\_Opportunity\_Stage\_Report** =Shows opportunities at each stage of the sales cycle, helping management predict revenue and sales pipeline health.
  - **AM\_TestDrive\_with\_Lead** =Links test drive bookings with lead details, so sales agents can measure interest and follow up effectively.
  - **AM\_Lead\_Conversion** =Tracks how many leads are converted into accounts/opportunities, highlighting sales performance and conversion success rate.
- **Screenshot:**



Search...



Report: Opportunities

### AM\_Opportunity\_Stage\_Report

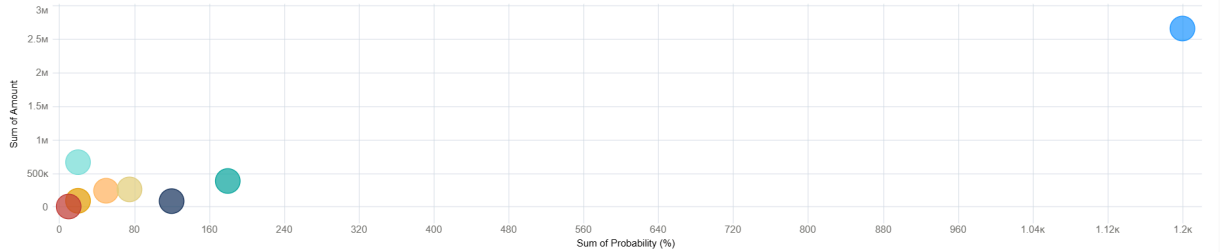
Enable Field Editing



Edit



Total Records: 22  
Total Amount: \$4,466,032.00  
Total Probability (%): 1,675%



<input type="checkbox"/> Stage	<input type="checkbox"/> Opportunity Name	<input type="checkbox"/> Amount	<input type="checkbox"/> Close Date	<input type="checkbox"/> Probability (%)
<input type="checkbox"/> Prospecting (2)	Pyramid Emergency Generators	\$100,000.00	7/15/2025	10%



Search...



Report: Screen Flows

### 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?

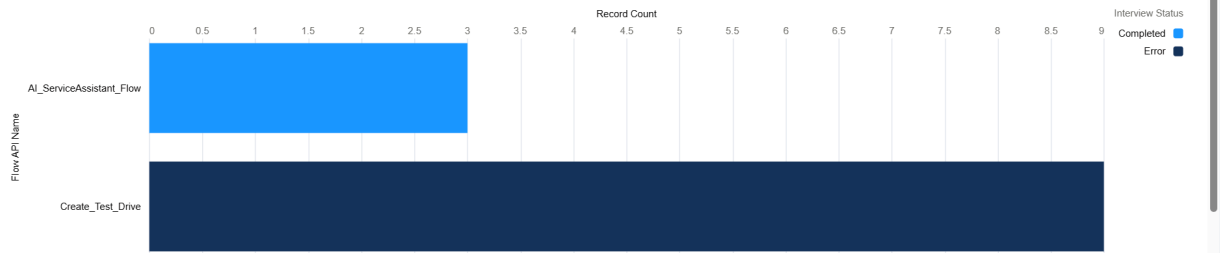
Enable Field Editing



Edit

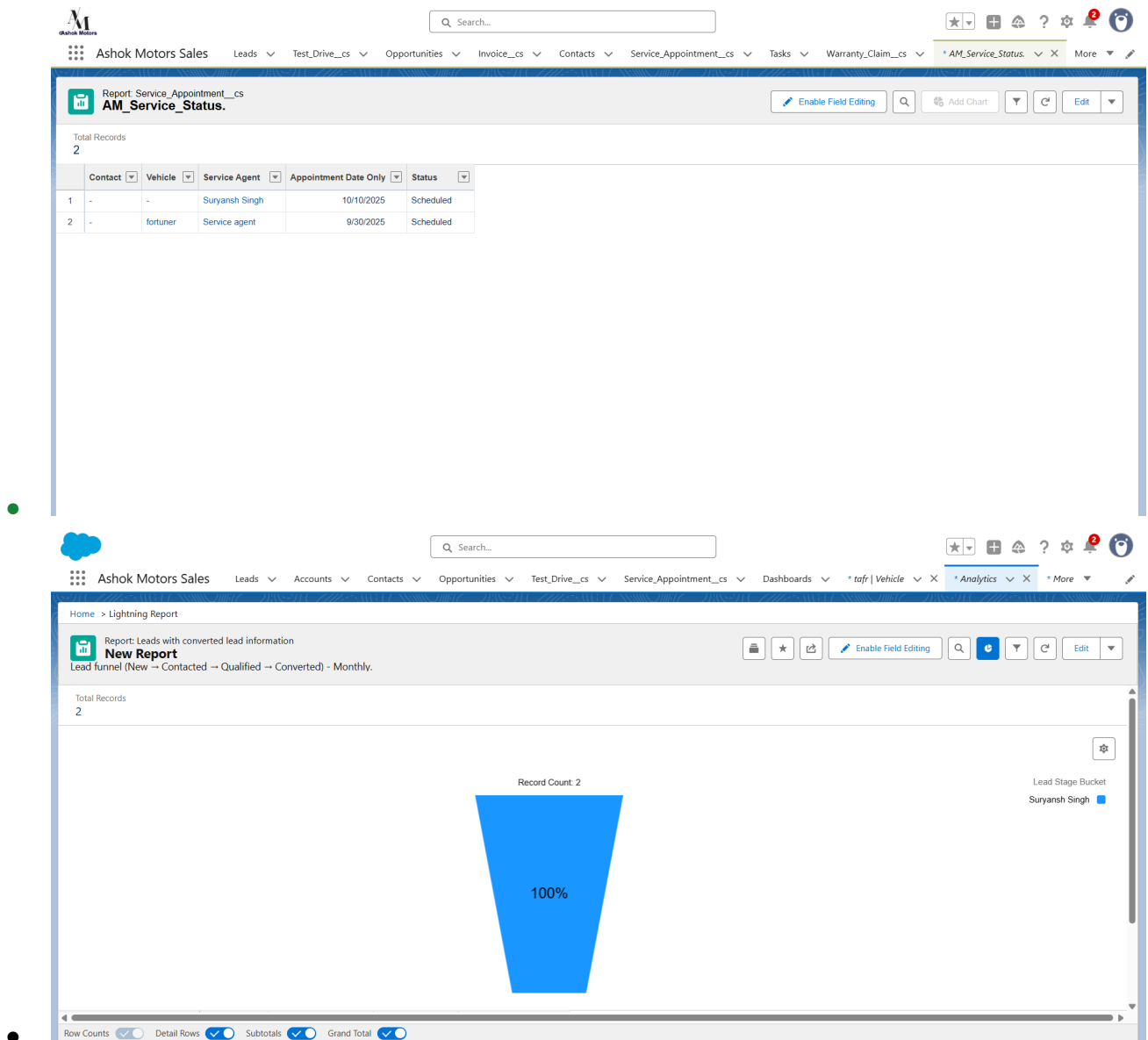


Total Records: 12  
Total Element Duration in Minutes: 12.00  
Average Element Duration in Min...: 1.00



<input type="checkbox"/> Flow API Name	<input type="checkbox"/> Interview Status	<input type="checkbox"/> Sum of Element Duration in Minutes	<input type="checkbox"/> Average Element Duration in Minutes	<input type="checkbox"/> Record Count
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Row Counts: ☒ Detail Rows: ☐ Subtotals: ☒ Grand Total: ☒



## 2. Dashboards

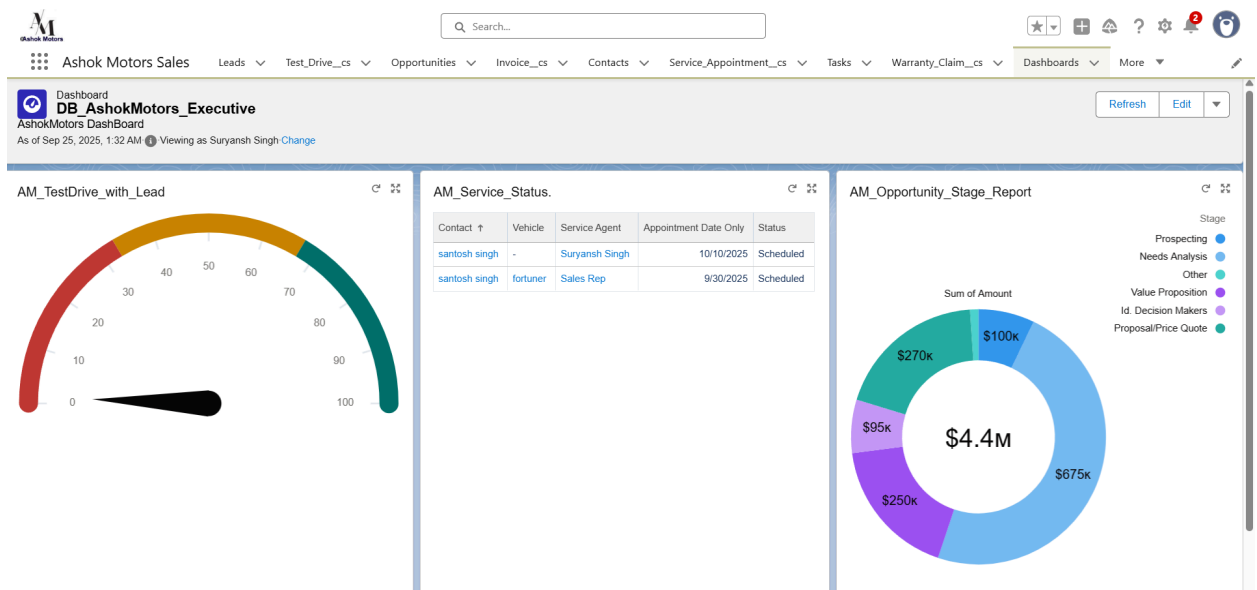
- **Purpose:** Visualize KPIs and performance metrics.
- **Examples:**
  1. Monthly Sales Performance

## 2. Lead Funnel and Agent Activity

## 3. Vehicle Booking Status

- **Dynamic Dashboards:** allows the CEO of Ashok Motors to see **real-time, role-based insights** without creating separate dashboards for each user
- It combines **Service Status, Opportunity Stages, Test Drive with Leads, and Lead Conversion** into one place.
- The CEO can monitor **overall sales growth, conversion efficiency, customer service performance, and test drive impact** in real time.
- Purpose: To provide **quick, data-driven decisions** and a **360° business view** without depending on manual reports from team members.

- **Screenshot:**



## 3. Field Level Security

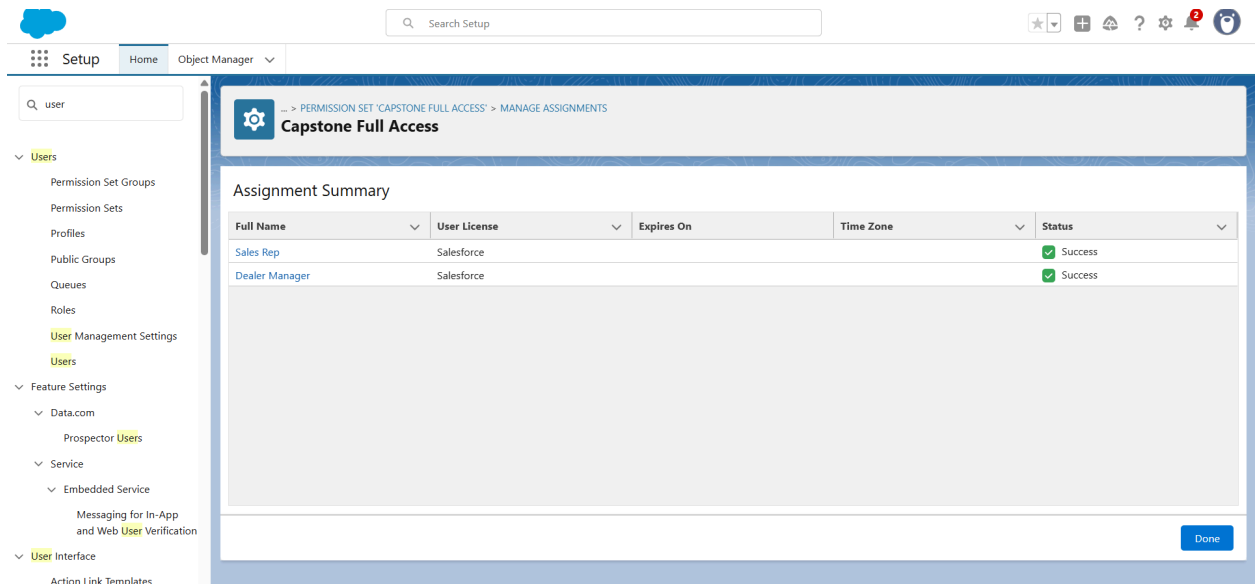
- **Purpose:** Restrict access to sensitive fields based on profiles/permission sets
- **Example:**
  - Invoice\_\_c.Amount\_\_c visible only to Admin\_User and Dealer\_Manager

The screenshot shows the Salesforce Setup interface, specifically the 'Profiles' page. The left sidebar contains a navigation menu with options like 'Users', 'Feature Settings', 'Data.com', 'Service', 'Embedded Service', 'Messaging for In-App and Web User Verification', 'User Interface', and 'Action Link Templates'. The main content area is titled 'Profiles' and displays a table of permissions for various objects and fields. The table is organized into two main sections: 'Basic Access' and 'Data Administration'. The 'Basic Access' section includes permissions for 'Read', 'Create', 'Edit', and 'Delete'. The 'Data Administration' section includes permissions for 'View All Records', 'Modify All Records', and 'View All Fields'. The table lists various objects such as 'Data Package Kit Definitions', 'Data Kit Objects', 'Data Platforms', 'Data Semantic Search Definitions', 'Data Share Definitions', 'Data Share Sagemaker Connections', 'Data Share Snowflake Connections', 'Data Share Targets', 'Data Share Target Connection', 'Waitlists', 'Web Cart Documents', 'Web Store Inventory Sources', 'Work Orders', 'Work Plans', 'Work Plan Templates', 'Work Step Templates', 'Work Types', and 'Work Type Groups'. The 'Custom Object Permissions' section shows permissions for 'Dealers', 'Invoice\_cs', and 'Service\_Appointment\_cs'. The 'Session Settings' section is also visible at the bottom.

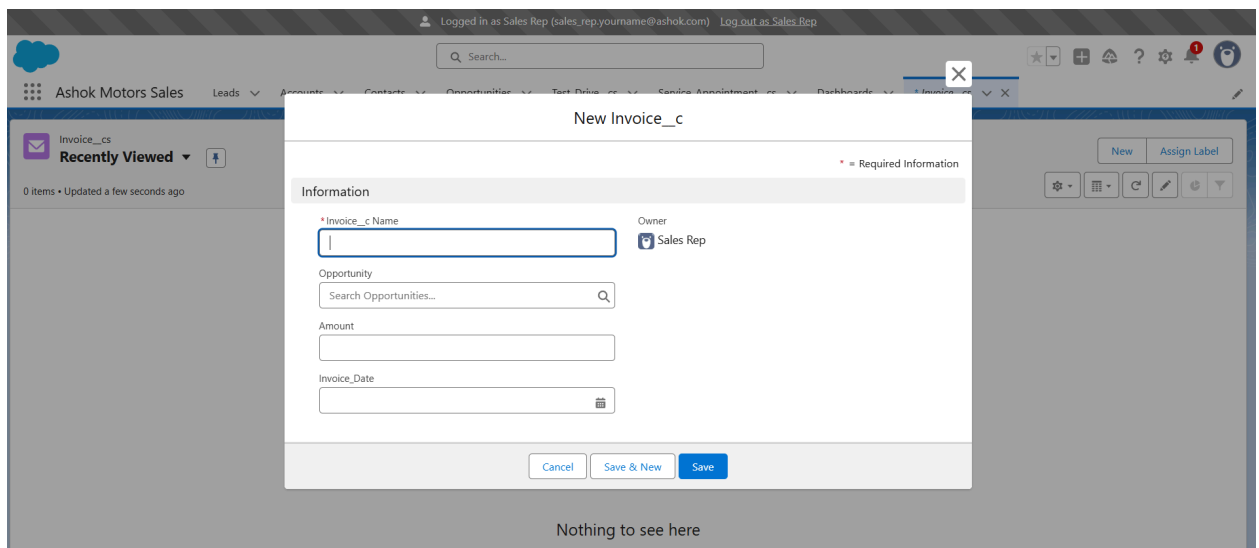
- User sales Reps is not able to create record in Invoice.

The screenshot shows the Salesforce interface for the 'Invoice\_\_cs' object. The top navigation bar indicates the user is logged in as 'Sales Rep (sales\_rep.yourname@ashok.com)'. The main content area displays a 'Recently Viewed' section with a message: 'Nothing to see here. There's nothing in your list yet. Try adding a new record.' The interface includes a search bar, a list of tabs (Leads, Accounts, Contacts, Opportunities, Test\_Drive\_cs, Service\_Appointment\_cs, Dashboards, Invoice\_\_cs), and a list of records (0 items). The 'Invoice\_\_cs' tab is selected, and the 'Assign Label' button is visible.

Now Capstone Full Access Permission Set will help him.



Now he is able to form new records in InVoice.



Field-Level Security controls visibility and editability of individual fields for users.

It ensures that only authorized roles can view or update sensitive data.

FLS helps prevent accidental or malicious data exposure in the org.

It maintains compliance and safeguards business-critical information.

## 4. Audit Trail

- **Purpose:** Track metadata changes for accountability
- **Example:** Monitored changes to custom objects, fields, and automation rules
- **Screenshot:**

The screenshot displays the Salesforce Setup Audit Trail interface. The left sidebar shows the Setup menu with 'Security' expanded and 'View Setup Audit Trail' selected. The main content area is titled 'View Setup Audit Trail' and includes a search bar and a table of recent changes. The table has columns for Date, User, Source Namespace Prefix, Action, Section, and Delegate User. The table lists 20 entries, including logins, permission changes, and page modifications.

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/25/2025, 10:11:43 AM PDT	sales_rep_username@ashok.com		Logged out using Login-As access for Sales Rep	Manage Users	suryansh.singh.cs22908@agentforce.com
9/25/2025, 10:11:06 AM PDT	sales_rep_username@ashok.com		Logged in using Login-As access for Sales Rep	Manage Users	suryansh.singh.cs22908@agentforce.com
9/25/2025, 10:10:09 AM PDT	suryansh.singh.cs22908@agentforce.com		Permission set Capstone Full Access: assigned to user Sales Rep (UserID: [005gl.0000080WBN])	Manage Users	
9/25/2025, 10:09:37 AM PDT	suryansh.singh.cs22908@agentforce.com		Changed profile Sales_Rep_Invoice__c object permissions were changed from Read to Read, Create, Edit, Delete	Manage Users	
9/25/2025, 10:08:39 AM PDT	sales_rep_username@ashok.com		Logged out using Login-As access for Sales Rep	Manage Users	suryansh.singh.cs22908@agentforce.com
9/25/2025, 10:07:34 AM PDT	sales_rep_username@ashok.com		Logged in using Login-As access for Sales Rep	Manage Users	suryansh.singh.cs22908@agentforce.com
9/25/2025, 10:06:17 AM PDT	suryansh.singh.cs22908@agentforce.com		Changed profile Sales_Rep_Invoice__c object permissions were changed from Read, Create, Edit, Delete to Read	Manage Users	
9/25/2025, 10:00:41 AM PDT	suryansh.singh.cs22908@agentforce.com		Permission set Capstone Full Access: unassigned from user Service Agent (UserID: [005gl.0000080WBN])	Manage Users	
9/25/2025, 8:24:20 AM PDT	suryansh.singh.cs22908@agentforce.com		Changed Lightning Page: Sales Rep Home - Ashok Motors	Lightning Pages	
9/25/2025, 8:19:59 AM PDT	suryansh.singh.cs22908@agentforce.com		Deleted Lightning Page: Lead Record Page - Ashok Motors	Lightning Pages	
9/25/2025, 8:18:22 AM PDT	suryansh.singh.cs22908@agentforce.com		Changed Lightning Page: Lead Record Page - Ashok Motors	Lightning Pages	