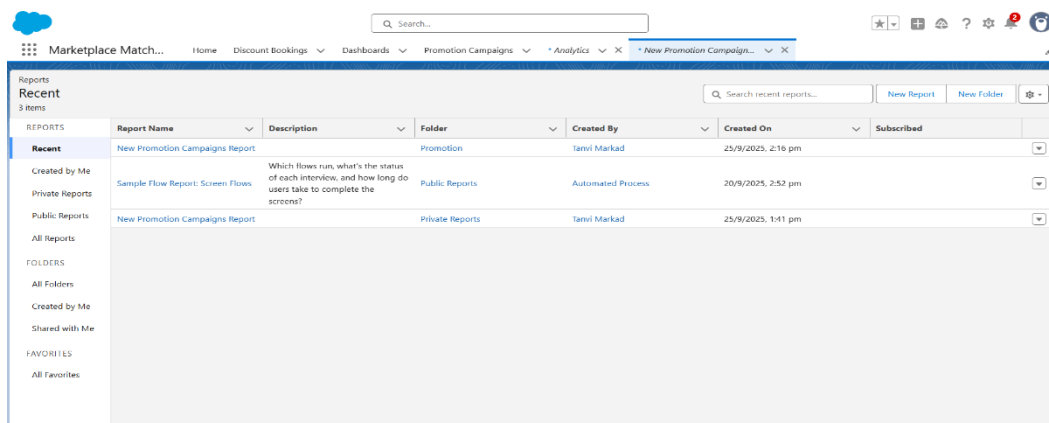


Phase 9: Reporting, Dashboards & Security Review

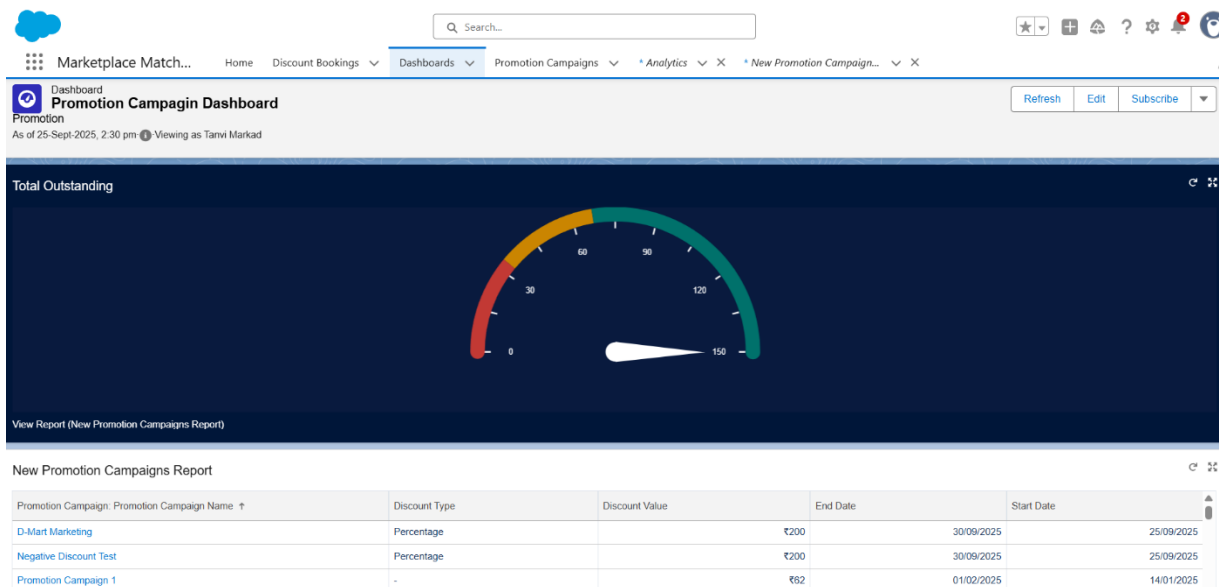
1.Reports And Report Types

- Setup→ Reports → New Report
 - New Promotion Campagin Report
 - Sample Flow Report :Screen Report



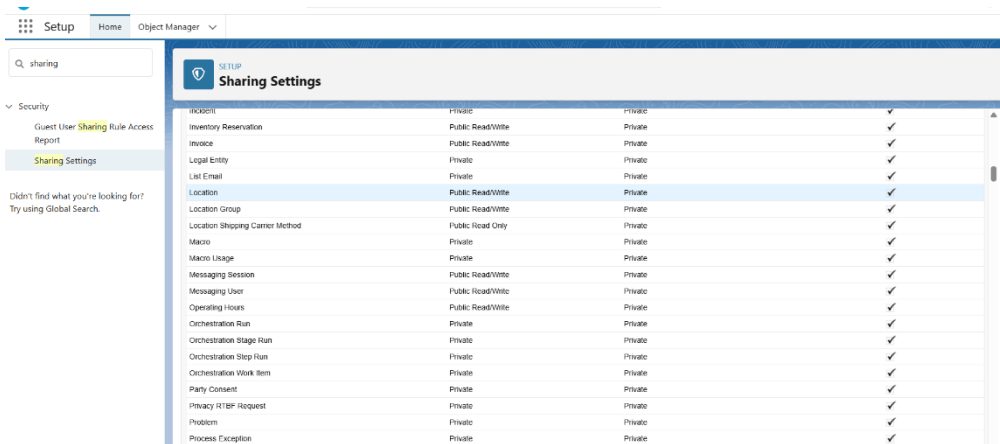
2.Dashboards

- Dashboards → New Dashboard →Promotion Campagin Dashboard
Flow → Folder Promotion Campagin Dashboard



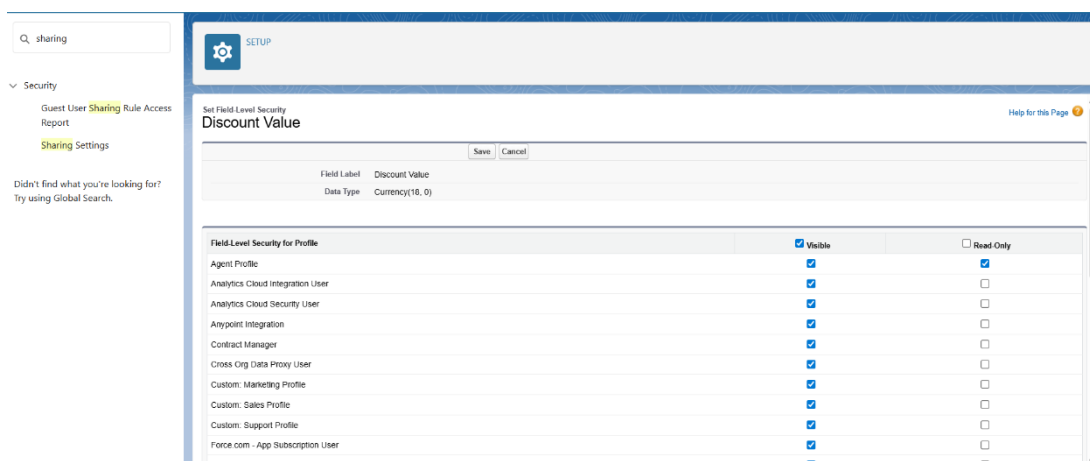
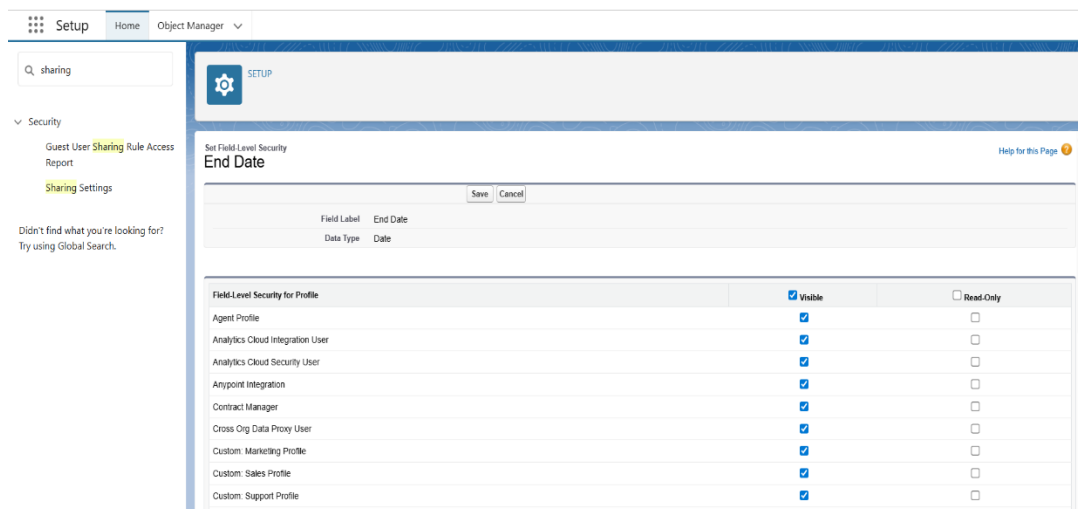
3. Sharing Settings

- Setup → Sharing Settings



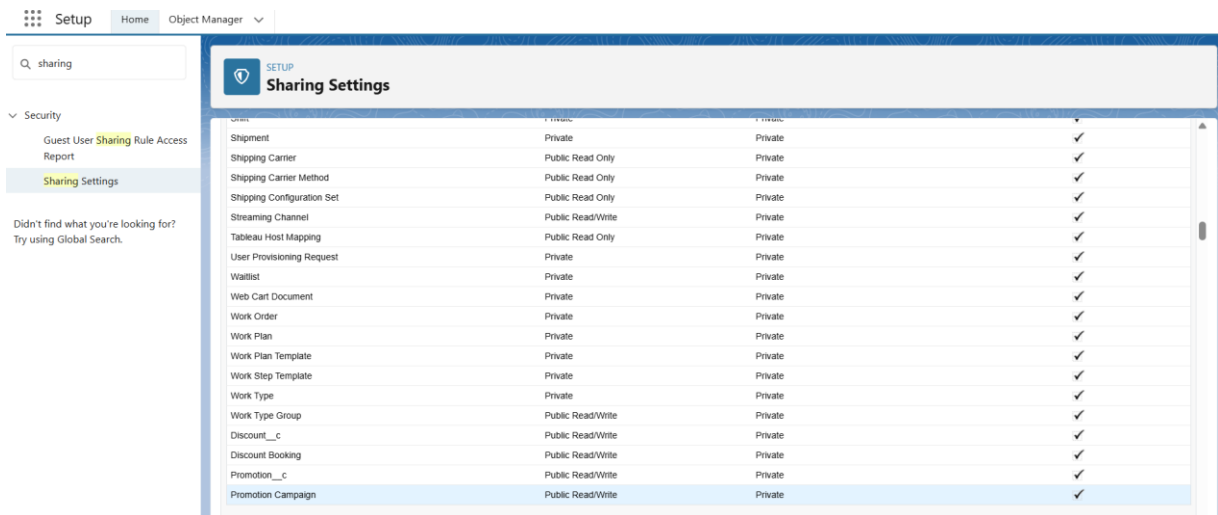
4. Field Level Security

- Setup → Object Manager → Promotion Campaign → Fields & Relationships → Set Field Level Security



5. OWD/Sharing Settings

- Setup → Sharing Settings → Promotions related Objects = Private



The screenshot shows the Salesforce Setup interface with the 'Sharing Settings' page selected. The left sidebar contains a search bar with 'sharing' and a list of categories including Security, Guest User Sharing Rule Access Report, and Sharing Settings. The main content area displays a table of sharing settings for various objects.

Object	Private	Public	✓
Shipment	Private	Private	✓
Shipping Carrier	Public Read Only	Private	✓
Shipping Carrier Method	Public Read Only	Private	✓
Shipping Configuration Set	Public Read Only	Private	✓
Streaming Channel	Public Read/Write	Private	✓
Tableau Host Mapping	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	✓
Discount__c	Public Read/Write	Private	✓
Discount Booking	Public Read/Write	Private	✓
Promotion__c	Public Read/Write	Private	✓
Promotion Campaign	Public Read/Write	Private	✓

6. Login IP Ranges

- Setup → Profiles → Officer Profile



The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar contains a search bar with 'profiles' and a list of categories including Users and Profiles. The main content area displays the 'Login IP Ranges' section for the 'Officer Profile'.

Login IP Ranges [New] [Login IP Ranges Help ?]

Action	IP Start Address	IP End Address	Description
Edit Del	202.148.58.196	202.148.58.196	

Enabled Apex Class Access [Edit] [Enabled Apex Class Access Help ?]
No Apex Classes enabled

Enabled Visualforce Page Access [Edit] [Enabled Visualforce Page Access Help ?]
No Visualforce Pages enabled

Enabled External Data Source Access [Edit] [Enabled External Data Source Access Help ?]
No External Data Sources enabled

Enabled Named Credential Access [Edit] [Enabled Named Credential Access Help ?]
No Named Credential enabled

Enabled External Credential Principal Access [Edit]

7. Audit Trail

- Setup → View Setup Audit Trail

Q audit

Security

View Setup Audit Trail

idn't find what you're looking for?
y using Global Search.

SETUP

View Setup Audit Trail

Help for this Page

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).

View Setup Audit Trail

Date	User	Source Namespace Prefix	Action	Section	Delegate User
26/09/2025, 6:31:28 am IST	markadtanvi1@gmail.com		Activated user Smart Retail Promotions Portal Site Guest User (UserID: [005dL00001G79v3])	Manage Users	
26/09/2025, 6:28:36 am IST	markadtanvi1@gmail.com		Created Email Alert Promotion Expiry Reminder Email Alert for Object: Promotion Campaign	Workflow Rule	
26/09/2025, 6:25:10 am IST	markadtanvi1@gmail.com		Activated workflow rule Promotion_Expiry_Reminder for Object: Promotion Campaign	Workflow Rule	
26/09/2025, 6:25:03 am IST	markadtanvi1@gmail.com		Changed workflow rule Promotion_Expiry_Reminder for Object: Promotion Campaign	Workflow Rule	
25/09/2025, 11:35:34 pm IST	markadtanvi1@gmail.com		Created workflow rule Promotion_Expiry_Reminder for Object: Promotion Campaign	Workflow Rule	
25/09/2025, 10:58:47 pm IST	markadtanvi1@gmail.com		Changed profile Smart Retail Promotions Portal Profile: SiteTemplate Visualforce page access was enabled	Manage Users	
25/09/2025, 10:58:47 pm IST	markadtanvi1@gmail.com		Created Salesforce Site Smart_Retail_Promotions_Portal (ID: [00Mdl0000030R0H])	Sites	
25/09/2025, 10:58:46 pm IST	markadtanvi1@gmail.com		Changed profile Smart Retail Promotions Portal Profile: FileNotFound Visualforce page access was enabled	Manage Users	
25/09/2025, 10:58:46 pm IST	markadtanvi1@gmail.com		Changed profile Smart Retail Promotions Portal Profile: Exception Visualforce page access was enabled	Manage Users	
25/09/2025, 10:58:46 pm IST	markadtanvi1@gmail.com		Changed profile Smart Retail Promotions Portal Profile: InMaintenance Visualforce page access was enabled	Manage Users	
25/09/2025, 10:58:46 pm IST	markadtanvi1@gmail.com		Changed profile Smart Retail Promotions Portal Profile: Unauthorized Visualforce page access was enabled	Manage Users	
25/09/2025, 10:58:46 pm IST	markadtanvi1@gmail.com		Changed profile Smart Retail Promotions Portal Profile: BandwidthExceeded Visualforce page access was enabled	Manage Users	
25/09/2025, 10:58:46 pm IST	markadtanvi1@gmail.com		Changed profile Smart Retail Promotions Portal Profile: ForgotPassword Visualforce page access was enabled	Manage Users	
25/09/2025, 10:58:45 pm IST	markadtanvi1@gmail.com		Changed profile Smart Retail Promotions Portal Profile: SiteRegisterConfirm Visualforce page access was enabled	Manage Users	
25/09/2025, 10:58:45 pm IST	markadtanvi1@gmail.com		Changed profile Smart Retail Promotions Portal Profile: ForgotPasswordConfirm Visualforce page access was enabled	Manage Users	
25/09/2025, 10:58:45 pm IST	markadtanvi1@gmail.com		Changed profile Smart Retail Promotions Portal Profile: SiteRegister Visualforce page access was enabled	Manage Users	

AutoSave OFF

SetupAuditTrail1758794452... Saved to this PC

Search

File Home Insert Draw Page Layout Formulas Data Review View Help

Clipboard

Font

Alignment

Number

Styles

Cells

Editing

Add-ins

Comments

Share

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W
1	Date	User	Source Na	Action	Section	Delegate User																	
2	25/09/202	markadtanvi1@gmail.com	Added Log	Manage Users																			
3	25/09/202	markadtanvi1@gmail.com	Session Se	Session Settings																			
4	25/09/202	markadtanvi1@gmail.com	Session Se	Session Settings																			
5	25/09/202	markadtanvi1@gmail.com	Session Se	Session Settings																			
6	25/09/202	markadtanvi1@gmail.com	Session Se	Session Settings																			
7	25/09/202	markadtanvi1@gmail.com	Session Se	Session Settings																			
8	25/09/202	markadtanvi1@gmail.com	Session Se	Session Settings																			
9	25/09/202	markadtanvi1@gmail.com	Changed p	Manage Users																			
10	25/09/202	markadtanvi1@gmail.com	Changed p	Manage Users																			
11	25/09/202	markadtanvi1@gmail.com	Changed p	Manage Users																			
12	25/09/202	markadtanvi1@gmail.com	Changed p	Manage Users																			
13	25/09/202	markadtanvi1@gmail.com	Changed p	Manage Users																			
14	25/09/202	markadtanvi1@gmail.com	Created re	Custom Objects																			
15	25/09/202	markadtanvi1@gmail.com	For match	Matching Rule																			
16	25/09/202	markadtanvi1@gmail.com	For match	Matching Rule																			
17	25/09/202	markadtanvi1@gmail.com	Created n	Matching Rule																			
18	25/09/202	markadtanvi1@gmail.com	Created n	Duplicate Rule																			
19	25/09/202	markadtanvi1@gmail.com	Added stai	Standard Buttons and Links																			
20	25/09/202	markadtanvi1@gmail.com	Created Li	Lightning Pages																			
21	25/09/202	markadtanvi1@gmail.com	Changed p	Lightning Components																			
22	25/09/202	markadtanvi1@gmail.com	Created pr	Lightning Components																			
23	25/09/202	markadtanvi1@gmail.com	Created pr	Apex Class																			
24	25/09/202	markadtanvi1@gmail.com	Created Pr	Apex Class																			
25	25/09/202	markadtanvi1@gmail.com	Created Sc	Apex Class																			
26	25/09/202	markadtanvi1@gmail.com	Created Pr	Apex Class																			
27	25/09/202	markadtanvi1@gmail.com	Created Pr	Apex Class																			
28	25/09/202	markadtanvi1@gmail.com	Created Pr	Apex Class																			

SetupAuditTrail1758794452017