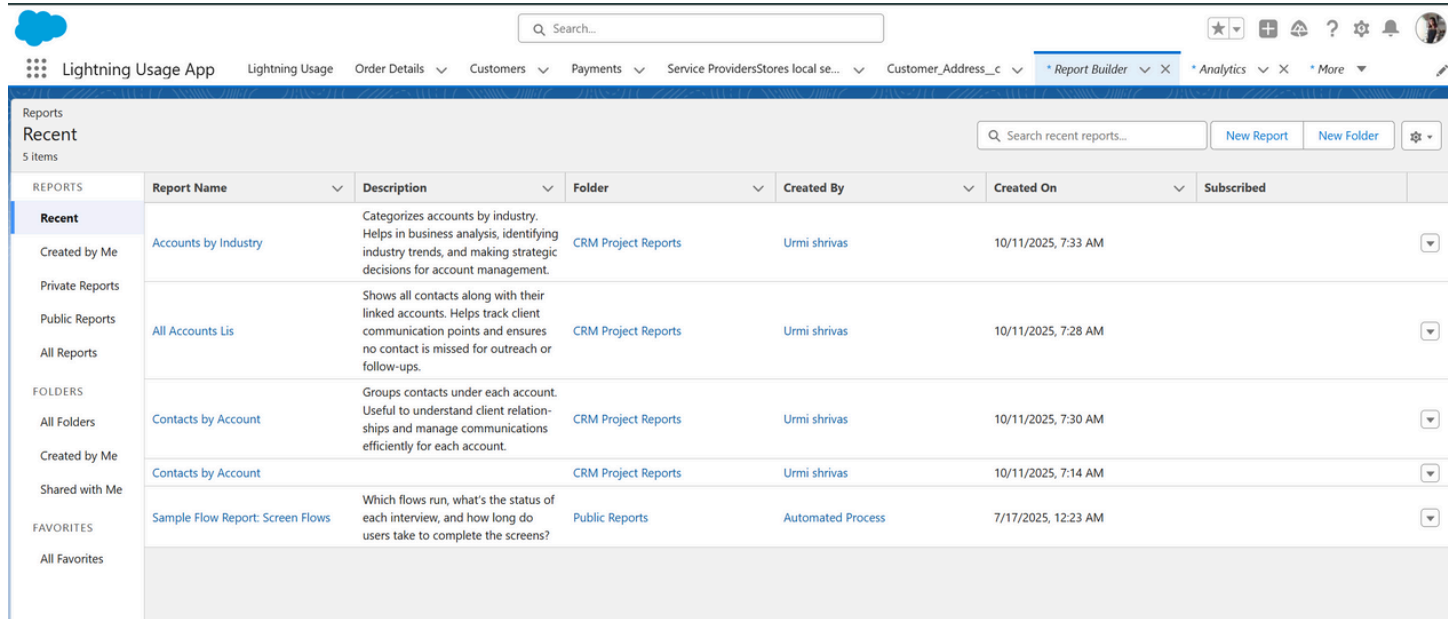


Phase 9: Reporting, Dashboards & Security review

1. Reports(Tabular, Summary, Matrix,Joined)

- **Folder:** All reports saved in **CRM Project Reports** folder.
- **Filters / Grouping:** Adjust as per project requirements.
- **Purpose:** Each report is aligned to project needs like tracking clients, contacts, industry distribution, and owner responsibilities.



The screenshot shows the Salesforce Reports interface. At the top, there's a search bar and navigation tabs for various Salesforce features. Below the navigation, the 'Reports' section is active, showing a list of recent reports. The table has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The reports listed are 'Accounts by Industry', 'All Accounts Lis', 'Contacts by Account', 'Sample Flow Report: Screen Flows', and 'All Favorites'.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Accounts by Industry	Categorizes accounts by industry. Helps in business analysis, identifying industry trends, and making strategic decisions for account management.	CRM Project Reports	Urmi shrivas	10/11/2025, 7:33 AM	
Created by Me	All Accounts Lis	Shows all contacts along with their linked accounts. Helps track client communication points and ensures no contact is missed for outreach or follow-ups.	CRM Project Reports	Urmi shrivas	10/11/2025, 7:28 AM	
Private Reports	Contacts by Account	Groups contacts under each account. Useful to understand client relationships and manage communications efficiently for each account.	CRM Project Reports	Urmi shrivas	10/11/2025, 7:30 AM	
Public Reports	Contacts by Account		CRM Project Reports	Urmi shrivas	10/11/2025, 7:14 AM	
All Reports	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	7/17/2025, 12:23 AM	
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

2. Report types

- A Report Type in Salesforce defines the **set of records and fields** available for a report. It determines **which objects and related data** can be included in a report.
1. **Purpose in Project:**
 - In this project, Report Types are used to ensure that the **correct data from Accounts and Contacts** is available for reporting. They allow grouping, filtering, and displaying information as per project needs.

Details

Display Label Accounts with Opportunities

API Name Accounts_with_Opportunities

Description Shows accounts along with their opportunities for project analysis

Created By Urmi shivas, 10/11/25, 8:09 PM

Store in Categ... accounts

Deployment St... Deployed

Modified By Urmi shivas, 10/11/25, 8:11 PM

Object Relationships

Accounts (A)

with at least one related record from Contracts (B)

Fields

Source Object	Included Fields
Accounts	63
Contracts	0

3. Dashboards

- The dashboard provides a **visual overview of the CRM project data**, combining key reports to help track and analyze client information.
- Contacts by Account widget** shows the number of contacts under each account, helping manage client relationships efficiently.
- Accounts by Industry widget** displays the distribution of accounts by industry, aiding in business analysis and strategy planning.

Overall, it allows **quick monitoring of accounts and contacts**, supports team workload tracking, and enhances decision-making within the project.

The screenshot shows the CRM Project Dashboard interface. At the top, there's a search bar and navigation tabs for Lightning Usage App, Lightning Usage, Order Details, Customers, Payments, Service Providers, Stores local se..., and Customer_Address_c. Below the navigation, the dashboard is titled 'CRM Project Dashboard' and includes buttons for '+ Widget', '+ Filter', and a refresh icon. Two widgets are displayed:

Contacts by Account

First Na...	Last N...	Account N...	Mailing...	Mailing State/Province (text o...
Alice	Black	-	-	-
Basil	Wencesl	-	-	-
Dragon	Davich	-	-	-
George	Dapper	-	-	-
Jack	Dodge	-	-	-
Jessica	Jones	-	-	-
John	Downes	-	-	-

View Report (Contacts by Account)

Accounts by Industry

Las...	Acc...	Account Name	Billing State/Provinc...	Type
-	Urmi shiva s	John Doe	-	Customer
-	Urmi shiva s	Jane Smith	-	Customer
-	Urmi shiva s	Account Name: Local Business Customers	-	-

View Report (Accounts by Industry)

4. Dynamic Dashboards

- Dynamic Dashboards allow users to view dashboard data **based on the logged-in user**.
- In this project, they help **team members see their own accounts and contacts**.
- This ensures **personalized data visibility** and supports efficient decision-making.

5. Sharing Setting

- **Service Provider:** Assigned to handle day-to-day service tasks and update records.
 - **Service Manager:** Oversees service operations, monitors progress, and ensures quality.
- These roles **help maintain proper workflow, role-based data visibility, and accountability** within the CRM project.

SETUP
Sharing Settings

Default Sharing Settings

Organization-Wide Defaults [Edit](#) [Organization-Wide Defaults Help ?](#)

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>

Other Settings [Other Settings Help ?](#)

Manager Groups ☐ [?](#)

Secure guest user record access ☒ [?](#)

Require permission to view record names in lookup fields ☐ [?](#)

Sharing Rules

Account Sharing Rules [New](#) [Recalculate](#) [Account Sharing Rules Help ?](#)

Action	Criteria	Shared With	Account and Contract	Opportunity	Case
Edit Del	Owner in Role: Service Manager	Role: Customer manager	Read Only	Read/Write	Read/Write
Edit Del	Owner in Group: Service Providers	Group: Service Providers	Read Only	Private	Private

6. Field level Security

- Controls visibility and edit access to specific fields for different user profiles.
- Used in the project to restrict sensitive fields for junior roles.
- Ensures data privacy while allowing access to necessary information.

7. Session Settings

- Configure **session timeout and security policies** in Salesforce.
- Implemented to **auto-logout inactive users** in the project.
- Enhances **CRM project data security** and prevents unauthorized access.

8. Login IP Ranges

- Restrict Salesforce login to **specific IP addresses**.

- Set for service managers and providers to **allow access only from company network**.
- Provides **controlled access** to CRM project data.

9. Audit Trail

- Tracks **changes made to setup and configuration** in Salesforce.
- Used to **monitor modifications in fields, sharing rules, and security settings**.
- Helps maintain **accountability and troubleshooting** in the project.