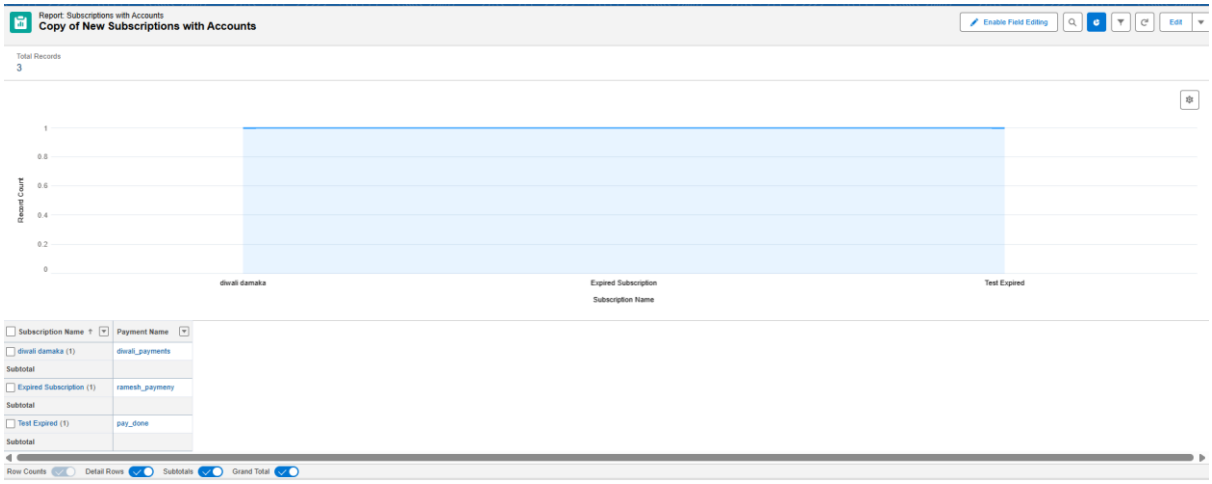
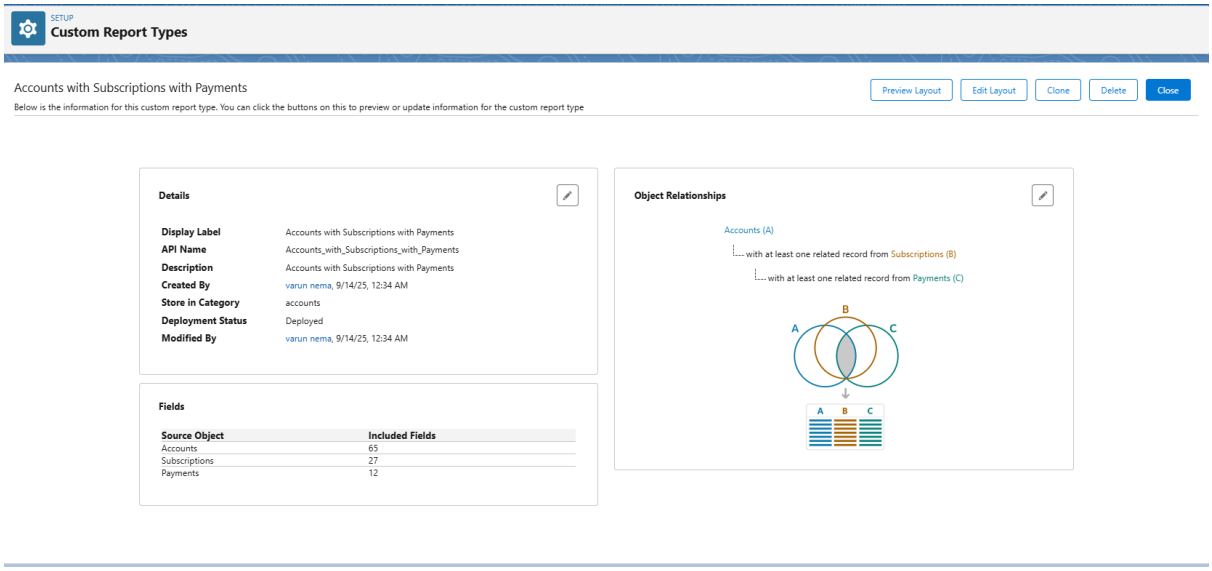
Project Title – “Smart Subscription Tracker”

Phase 9: Reporting, Dashboards & Security Review

Reports



Report Types



1. **Navigate to Setup**
   Go to **Setup** in Salesforce and search for **Report Types**.
2. **Create New Custom Report Type**
   - Select **Accounts** as the primary object.
   - Add related objects:
     - **Subscriptions** (with at least one related record).
     - **Payments** (with at least one related record).
3. **Define Report Relationships**
   Configure the object relationships so that the report only includes:
   - Accounts with at least one Subscription.
   - Subscriptions with at least one Payment.
4. **Add Fields to Report**
   - Accounts → 65 fields included.
   - Subscriptions → 27 fields included.
   - Payments → 12 fields included.
5. **Set Deployment Status**
   Mark the report type as **Deployed** so it can be used in report creation.
6. **Save and Verify**
   Save the custom report type and verify the relationships using the object relationship diagram.

Sharing setting

7) Reports & Dashboards folder sharing

1. Go to Reports (or Dashboards) → Folders → find your Subscription Project folder → **Share**.
2. Add Roles/Groups/Users with Viewer or Editor access.

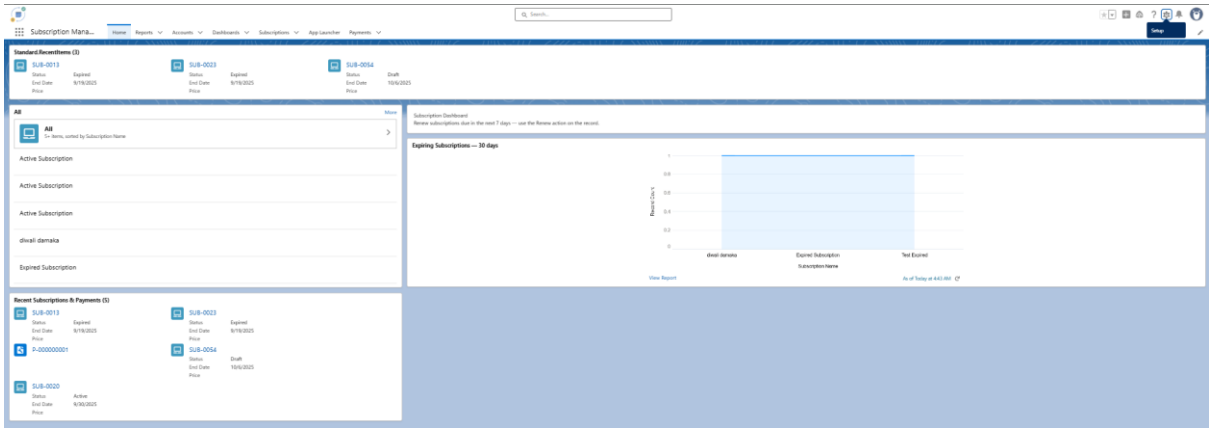
Field level security

2) Quick path: set visibility for a single field

1. Setup → **Object Manager** → **Subscription__c** → **Fields & Relationships**.
2. Click the field name (e.g., Payment_Info__c).
3. Click **Set Field-Level Security**.

4. Check/uncheck **Visible** for each profile.
5. Save.

Dashboards



- **Subscription Overview:**
  The dashboard provides a quick summary of all subscriptions, including their status (Active, Expired, Draft), end dates, and related payments.
- **Recent Items Section:**
  Displays recently accessed or modified subscriptions, allowing users to easily track and manage the latest records.
- **All Subscriptions List:**
  Shows a categorized list of all subscriptions (Active, Expired, Custom Names), enabling quick navigation and monitoring.
- **Subscription Dashboard Insights:**
  Highlights upcoming renewals (within 7 days) and provides actionable reminders for timely subscription renewals.
- **Graphical Representation:**
  A bar chart shows expiring subscriptions within the next 30 days, providing visual insights into subscription trends.
- **Recent Subscriptions & Payments:**
  Summarizes the most recent subscriptions and related payment activities for quick financial tracking.
- **User-Friendly Interface:**
  The dashboard is designed with a clear layout combining lists, charts, and summaries, making subscription management easier and more efficient.

Sharing Settings

1) Decide the baseline (Org-Wide Defaults — OWD)

1. Setup → Quick Find → **Sharing Settings**.
2. Under **Organization Wide Defaults**, find **Subscription__c** (your custom object).
3. Recommended for a demo with proper control: set **Private** (users see only records they own).
    - If you want everything visible without security: **Public Read/Write** (easy but not realistic).
4. Leave **Grant Access Using Hierarchies** checked (so managers see subordinates' records) unless you have a reason to disable it.

Why: Private demonstrates you know record-level security. You can then selectively share records.

2) Create roles (role hierarchy)

1. Setup → Quick Find → **Roles** → **Set Up Roles**.
2. Create a simple hierarchy:
    - Top: **Admin (Project Admin)**
    - Under Admin: **Sales Manager**
    - Under Sales Manager: **Sales Rep**
3. Assign demo users to these roles (Setup → Users → Edit user → Role).

Why: Role hierarchy gives upward visibility (manager sees reports of their reps).

3) Create Public Groups

1. Setup → Quick Find → **Public Groups** → **New**.
2. Example group names and members:
    - **Subscription Project Users** — add Sales Rep role + specific users.
    - **Sales Managers** — add Sales Manager role(s).
3. Use groups in sharing rules and folder sharing.

Why: Groups make sharing rules simpler (share to many users at once).

4) Create Sharing Rules (owner-based & criteria-based)

Setup → Quick Find → **Sharing Settings** → scroll to the **Subscription__c Sharing Rules** section → **New**.

A. **Owner-based example**

- Rule name: Share Subs Owned by SalesRep -> Project Users
- Rule type: **Based on record owner**
- Owned by: Role = **Sales Rep**
- Share with: Public Group = **Subscription Project Users**
- Access level: **Read/Write** (or Read Only)

B. **Criteria-based example**

- Rule name: Share Enterprise Account Subs -> Sales Managers
- Rule type: **Based on criteria**
- Criteria: Account.Type = Enterprise (or Account__r.Type depending on your field)
- Share with: Role = **Sales Manager**
- Access level: **Read Only** or **Read/Write**

Session setting

For sales rep

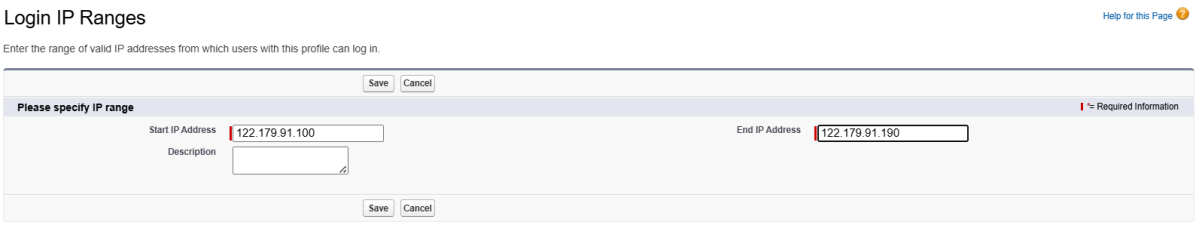
Login IP Ranges

- **Open the Profile**

- **Setup → Quick Find → Profiles → select the profile you want to restrict (e.g., Sales Rep).**
- **Scroll down to Login IP Ranges.**

- **Add a new range**

- **Click New.**
- **Enter Start IP Address → e.g., 103.45.67.80.**
- **Enter End IP Address → e.g., 103.45.67.100.**
- **Save.**



Audit Trail

Open Setup Audit Trail

1. Go to Setup → Quick Find → View Setup Audit Trail.
2. You'll see the 20 most recent changes by default.

SETUP

View Setup Audit Trail

View Setup Audit Trail

Help for this Page

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
9/25/2025, 4:03:37 AM PDT	cse22_varunnema547@agentforce.com		Added Login Ip Range to Sales_Profile from 122.179.91.100 to 122.179.91.190	Manage Users	
9/25/2025, 3:55:29 AM PDT	cse22_varunnema547@agentforce.com		Changed profile Manager_profile: field-level security for Subscription: Payment Status was changed from No Access to Read/Write	Manage Users	
9/25/2025, 3:55:29 AM PDT	cse22_varunnema547@agentforce.com		Changed profile Sales_Profile: field-level security for Subscription: Payment Status was changed from No Access to Read/Write	Manage Users	
9/25/2025, 3:55:29 AM PDT	cse22_varunnema547@agentforce.com		Changed profile Manager_profile1: field-level security for Subscription: Payment Status was changed from No Access to Read/Write	Manage Users	
9/25/2025, 3:55:29 AM PDT	cse22_varunnema547@agentforce.com		Changed profile Standard User: field-level security for Subscription: Payment Status was changed from No Access to Read/Write	Manage Users	
9/25/2025, 3:55:29 AM PDT	cse22_varunnema547@agentforce.com		Changed profile System Administrator: field-level security for Subscription: Payment Status was changed from No Access to Read/Write	Manage Users	
9/25/2025, 3:55:29 AM PDT	cse22_varunnema547@agentforce.com		Changed profile Standard Platform User: field-level security for Subscription: Payment Status was changed from No Access to Read/Write	Manage Users	
9/25/2025, 3:42:06 AM PDT	cse22_varunnema547@agentforce.com		Changed profile Work.com Only User: field-level security for Subscription: Payment Status was changed from 2 to 0	Manage Users	
9/25/2025, 3:42:06 AM PDT	cse22_varunnema547@agentforce.com		Changed profile System Administrator: field-level security for Subscription: Payment Status was changed from Read/Write to No Access	Manage Users	
9/25/2025, 3:42:06 AM PDT	cse22_varunnema547@agentforce.com		Changed profile Standard User: field-level security for Subscription: Payment Status was changed from Read/Write to No Access	Manage Users	
9/25/2025, 3:42:06 AM PDT	cse22_varunnema547@agentforce.com		Changed profile Standard Platform User: field-level security for Subscription: Payment Status was changed from Read/Write to No Access	Manage Users	
9/25/2025, 3:42:06 AM PDT	cse22_varunnema547@agentforce.com		Changed profile Solution Manager: field-level security for Subscription: Payment Status was changed from Read/Write to No Access	Manage Users	
9/25/2025, 3:42:06 AM PDT	cse22_varunnema547@agentforce.com		Changed profile Salesforce API Only System Integrations: field-level security for Subscription: Payment Status was changed from Read/Write to No Access	Manage Users	
9/25/2025, 3:42:06 AM PDT	cse22_varunnema547@agentforce.com		Changed profile Sales_Profile: field-level security for Subscription: Payment Status was changed from Read/Write to No Access	Manage Users	
9/25/2025, 3:42:06 AM PDT	cse22_varunnema547@agentforce.com		Changed profile Read Only: field-level security for Subscription: Payment Status was changed from Read/Write to No Access	Manage Users	
9/25/2025, 3:42:06 AM PDT	cse22_varunnema547@agentforce.com		Changed profile Partner App Subscription User: field-level security for Subscription: Payment Status was changed from 2 to 0	Manage Users	
9/25/2025, 3:42:06 AM PDT	cse22_varunnema547@agentforce.com		Changed profile Minimum Access - Salesforce: field-level security for Subscription: Payment Status was changed from 2 to 0	Manage Users	
9/25/2025, 3:42:06 AM PDT	cse22_varunnema547@agentforce.com		Changed profile Minimum Access - API Only Integrations: field-level security for Subscription: Payment Status was changed from 2 to 0	Manage Users	
9/25/2025, 3:42:06 AM PDT	cse22_varunnema547@agentforce.com		Changed profile Marketing User: field-level security for Subscription: Payment Status was changed from Read/Write to No Access	Manage Users	
9/25/2025, 3:42:06 AM PDT	cse22_varunnema547@agentforce.com		Changed profile Manager_profile1: field-level security for Subscription: Payment Status was changed from Read/Write to No Access	Manage Users	

Download setup audit trail for last six months (Excel .csv file)