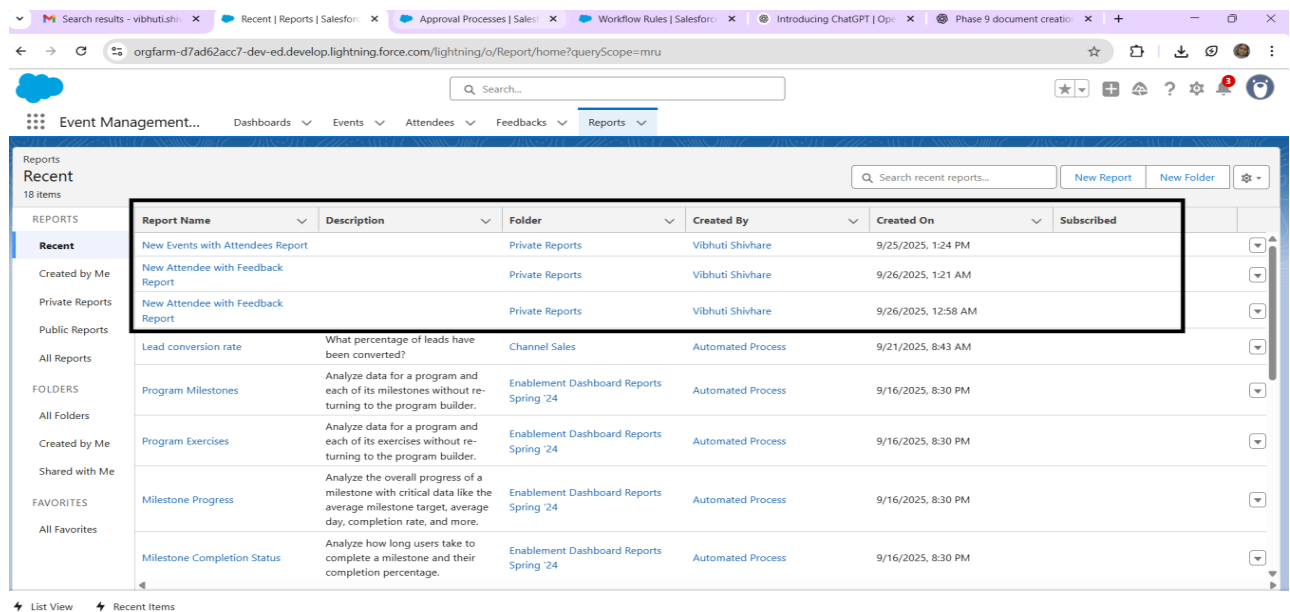


Phase 9 – Reporting, Dashboards

Step 1: Create a Report

- Go to App Launcher (grid icon) → Search “Reports”.
- Click “New Report”.
- Select the report type (example: Opportunities, Leads, or your custom object).
- Choose report format: Tabular, Summary, Matrix, or Joined.
- Add filters, fields, and grouping as needed.
- Save & Run the report.



The screenshot shows the Salesforce Reports interface. The top navigation bar includes the App Launcher (grid icon) and a search bar. The main content area displays a list of reports under the 'Recent' tab. A table with 7 columns is visible: Report Name, Description, Folder, Created By, Created On, and Subscribed. The table lists several reports, including 'New Events with Attendees Report', 'New Attendee with Feedback Report', 'Lead conversion rate', 'Program Milestones', 'Program Exercises', 'Milestone Progress', and 'Milestone Completion Status'. The 'Recent' tab is selected, and the 'New Report' button is visible in the top right corner.

Report Name	Description	Folder	Created By	Created On	Subscribed
New Events with Attendees Report		Private Reports	Vibhuti Shivhare	9/25/2025, 1:24 PM	
New Attendee with Feedback Report		Private Reports	Vibhuti Shivhare	9/26/2025, 1:21 AM	
New Attendee with Feedback Report		Private Reports	Vibhuti Shivhare	9/26/2025, 12:58 AM	
Lead conversion rate	What percentage of leads have been converted?	Channel Sales	Automated Process	9/21/2025, 8:43 AM	
Program Milestones	Analyze data for a program and each of its milestones without returning to the program builder.	Enablement Dashboard Reports Spring '24	Automated Process	9/16/2025, 8:30 PM	
Program Exercises	Analyze data for a program and each of its exercises without returning to the program builder.	Enablement Dashboard Reports Spring '24	Automated Process	9/16/2025, 8:30 PM	
Milestone Progress	Analyze the overall progress of a milestone with critical data like the average milestone target, average day, completion rate, and more.	Enablement Dashboard Reports Spring '24	Automated Process	9/16/2025, 8:30 PM	
Milestone Completion Status	Analyze how long users take to complete a milestone and their completion percentage.	Enablement Dashboard Reports Spring '24	Automated Process	9/16/2025, 8:30 PM	

Step 2: Create a Custom Report Type (if needed)

- Go to Setup → “Report Types” in Quick Find.
- Click “New Custom Report Type”.
- Select the primary object.
- Define related objects and field relationships.
- Save and deploy.

Reports

Recent

18 items

Search recent reports...

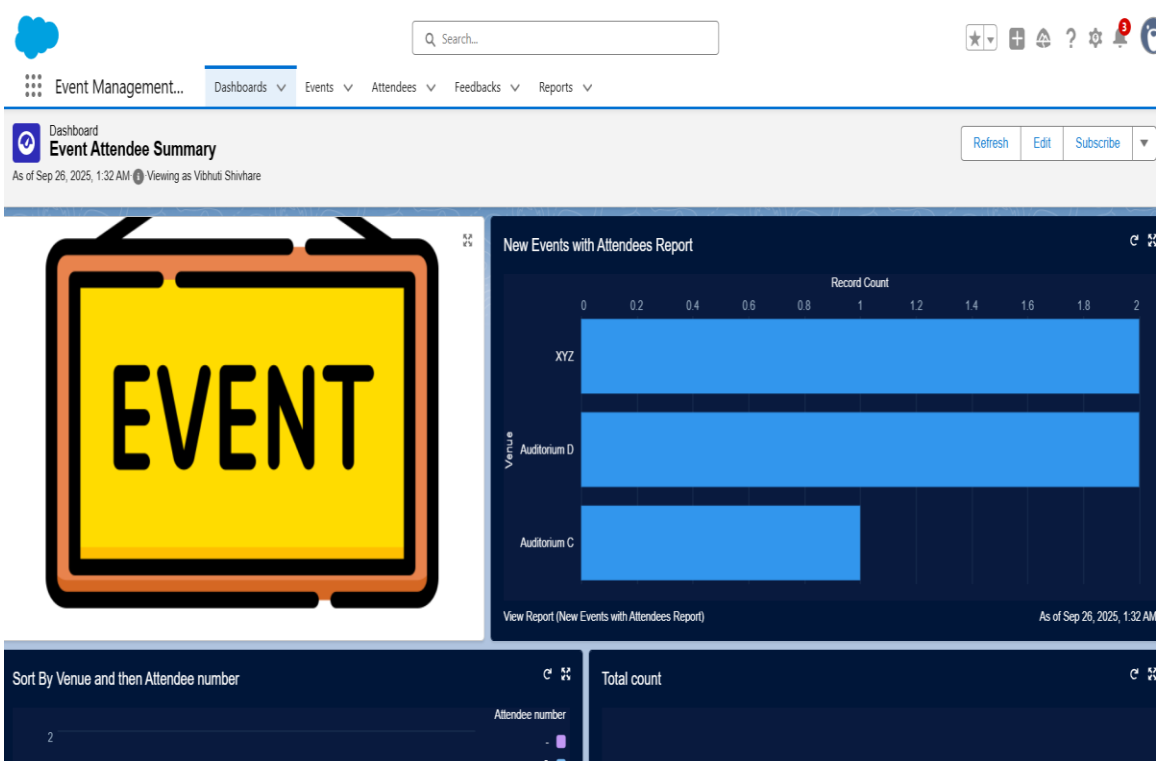
New Report New Folder

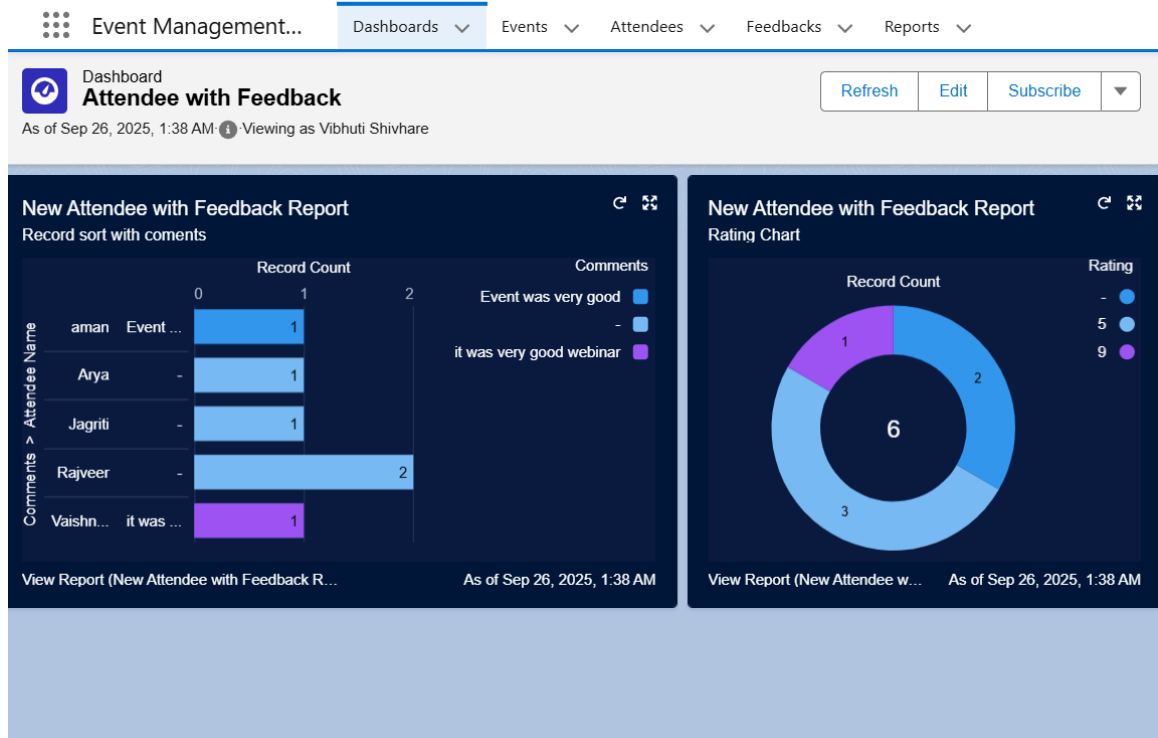
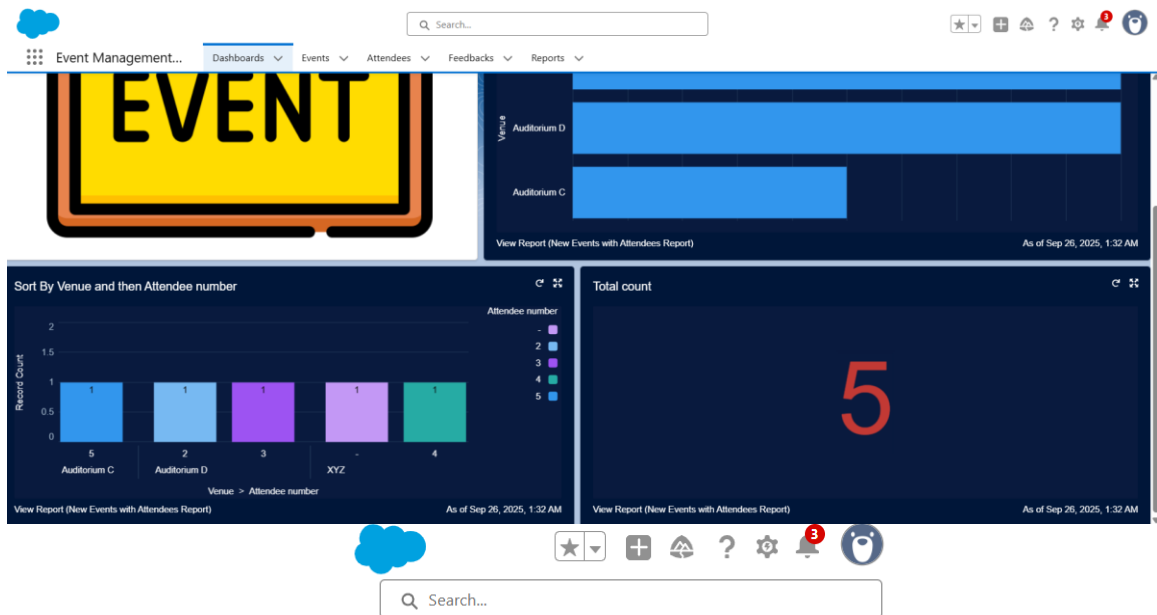
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Events with Attendees Report		Private Reports	Vibhuti Shivhare	9/25/2025, 1:24 PM	
Created by Me	New Attendee with Feedback Report		Private Reports	Vibhuti Shivhare	9/26/2025, 1:21 AM	
Private Reports	New Attendee with Feedback Report		Private Reports	Vibhuti Shivhare	9/26/2025, 12:58 AM	
Public Reports	Lead conversion rate	What percentage of leads have been converted?	Channel Sales	Automated Process	9/21/2025, 8:43 AM	
All Reports	Program Milestones	Analyze data for a program and each of its milestones without returning to the program builder.	Enablement Dashboard Reports Spring '24	Automated Process	9/16/2025, 8:30 PM	
FOLDERS	Program Exercises	Analyze data for a program and each of its exercises without returning to the program builder.	Enablement Dashboard Reports Spring '24	Automated Process	9/16/2025, 8:30 PM	
All Folders	Milestone Progress	Analyze the overall progress of a milestone with critical data like the average milestone target, average day, completion rate, and more.	Enablement Dashboard Reports Spring '24	Automated Process	9/16/2025, 8:30 PM	
Created by Me	Milestone Completion Status	Analyze how long users take to complete a milestone and their completion percentage.	Enablement Dashboard Reports Spring '24	Automated Process	9/16/2025, 8:30 PM	
Shared with Me						
FAVORITES						
All Favorites						

List View Recent Items

Step 3: Create a Dashboard

- Go to App Launcher → Search “Dashboards”.
- Click “New Dashboard”.
- Enter Name, Folder, Description.
- Add a new component (Chart, Table, Metric, Gauge).
- Select the source report for each component.
- Adjust layout and size.
- Save and view dashboard.





Step 4: Enable Dynamic Dashboards

- Open the dashboard you created.
- Click “Edit”.
- Under “View Dashboard As” select “Run as Logged-In User” (Dynamic) or choose a specific user (Static).
- Save.

Step 5: Configure Sharing Settings

- Go to Setup → “Sharing Settings”.
- Set Organization-Wide Defaults (OWD) for each object.
- Configure Role Hierarchy (Setup → “Roles”) to allow upward data access.
- Create Sharing Rules for wider access beyond OWD.
- Use Manual Sharing for individual records if needed.

Step 6: Apply Field-Level Security (FLS)

- Go to Setup → Object Manager → Select Object → Fields & Relationships.
- Click the field you want to secure.
- Click “Set Field-Level Security”.
- Select which profiles/permission sets can see or edit the field.
- Save.

Step 7: Adjust Session Settings

- Go to Setup → “Session Settings”.
- Set Session Timeout (e.g. 30 minutes).
- Enable/disable “Force Logout on Session Timeout”.
- Save.

Step 8: Configure Login IP Ranges

- Go to Setup → “Profiles”.
- Select the profile you want to secure.
- Scroll to “Login IP Ranges” → Click “New”.
- Enter allowed IP ranges.
- Save.

Step 9: Review Audit Trail

- Go to Setup → “View Setup Audit Trail” in Quick Find.
- Review who made changes, what was changed, and when.
- Export if needed for compliance/security reviews.

Purpose of Phase 9

- Gain accurate insights with Reports and Dashboards.
- Provide role-based and user-based visibility with Dynamic Dashboards and Sharing Settings.
- Protect sensitive data with Field-Level Security and IP restrictions.

- Monitor configuration changes with Audit Trail.