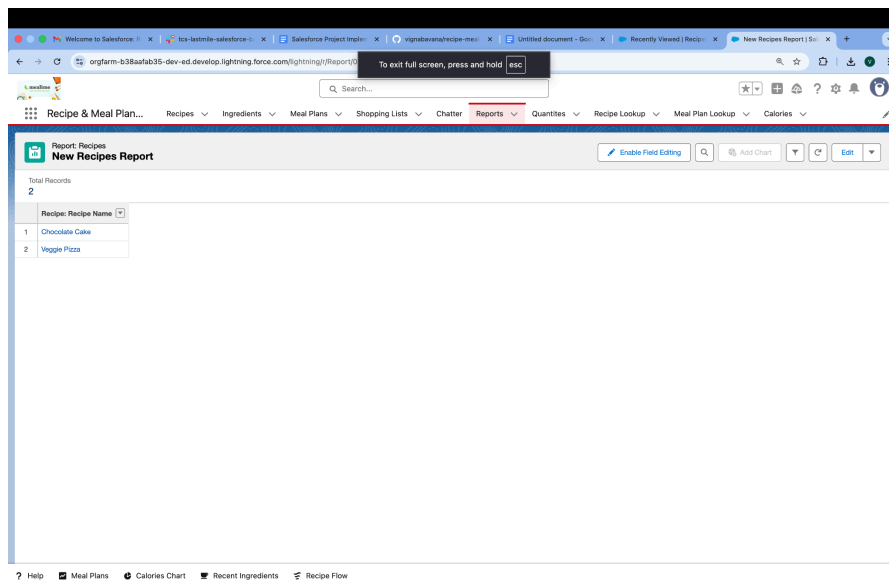


Phase 9: Reporting, Dashboards & Security Review

- Reports (Tabular, Summary, Matrix, Joined)
- Report Types
- Dashboards
- Dynamic Dashboards
- Sharing Settings
- Field Level Security
- Session Settings
- Login IP Ranges
- Audit Trail

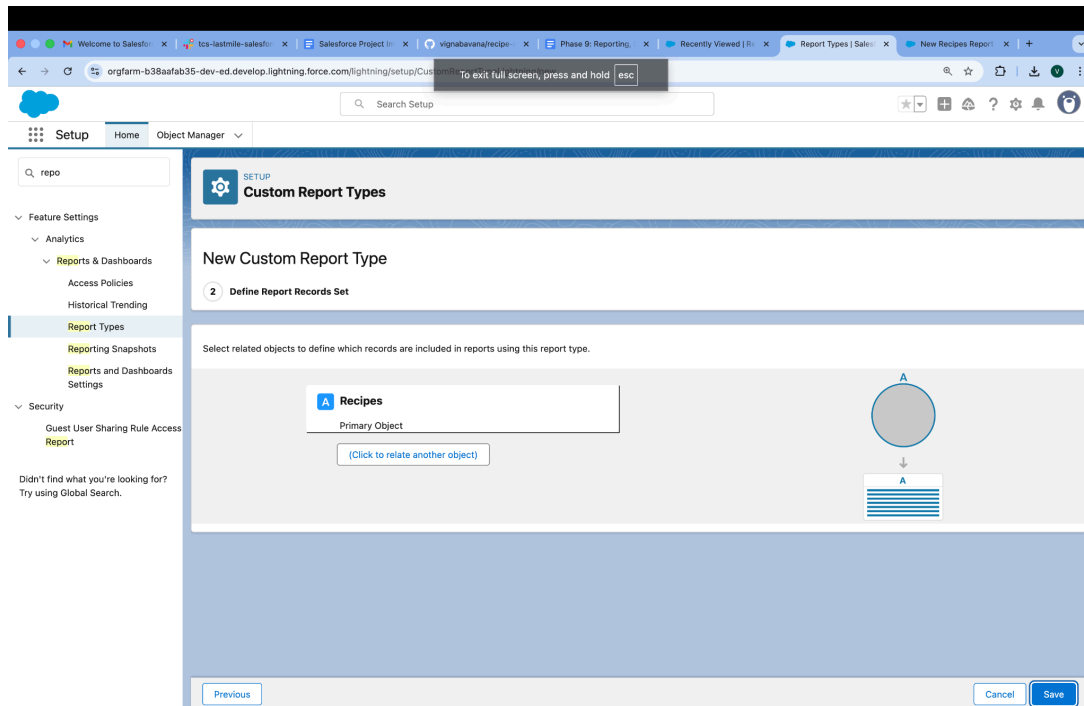
Reports

- **Tabular Report** → Simple list of records in rows/columns (like Excel). Best for exporting data.
- **Summary Report** → Includes groupings (e.g., by owner, stage). Supports subtotals.
- **Matrix Report** → Group by rows & columns (cross-tab). Great for comparisons.
- **Joined Report** → Combine multiple report blocks (different objects). Useful for multi-view analysis.



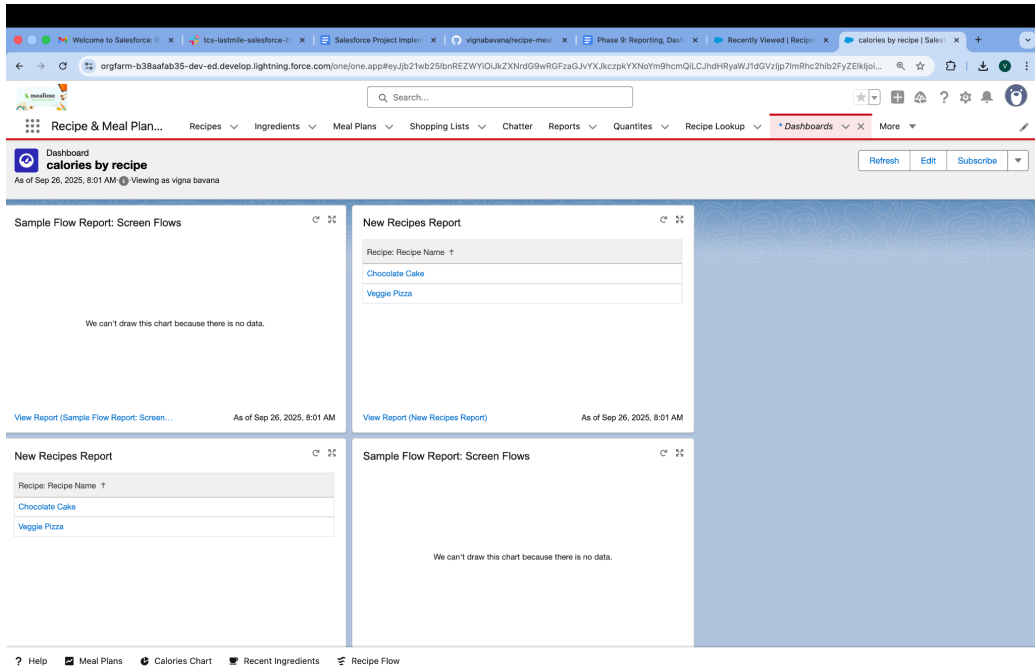
Report Types

- Define what objects and fields are available for building a report.
- **Standard Report Types** → Auto-created by Salesforce (e.g., Accounts with Contacts).
- **Custom Report Types** → Built by admins when standard ones don't meet needs.



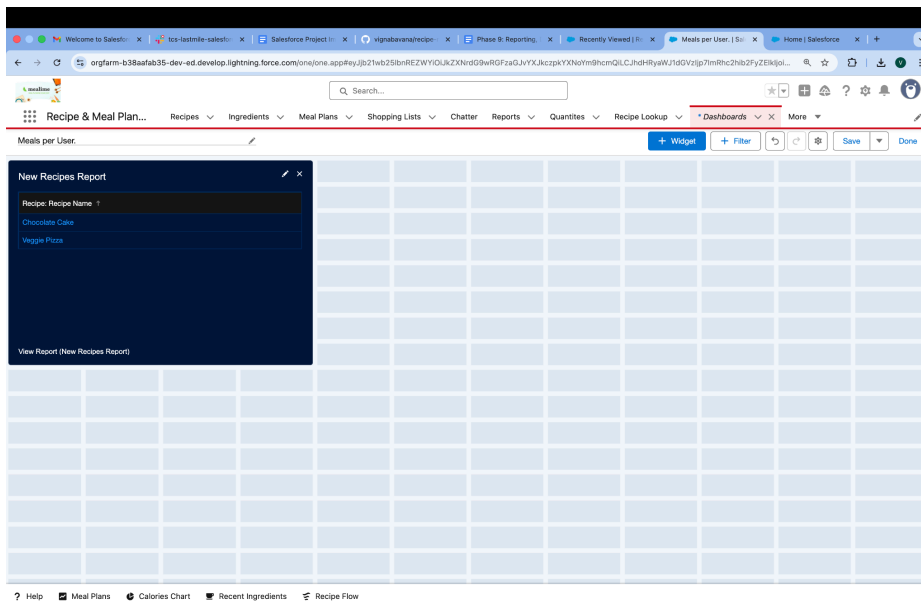
Dashboards

- Visual representations (charts, tables, gauges) of report data.
- Built on reports → Each dashboard component = one report view.



Dynamic Dashboards

- Show data as per the logged-in user's access (without creating multiple dashboards).
- Example: A sales rep sees only their deals; a manager sees the whole team.



Sharing Settings

- Org-wide defaults (OWD), Role Hierarchy, Sharing Rules.
- Controls who can see what records.

Field Level Security (FLS)

- Restrict access to sensitive fields (e.g., salary, SSN).
- Can be **Read-only**, **Hidden**, or **Editable** per profile/permission set.

Session Settings

- Manage login/session behavior → idle timeout, cache controls, forced re-login.
- Enhances security by limiting session duration.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'sess' entered and a list of categories including Einstein, Security, and Session Management. The main content area displays a 'Most Recently Used' list with 10 items. The list has columns for NAME, TYPE, and OBJECT. The items are: Calories (Duplicate Rule, Calories), ExternalData (External Data Source), RecipeEvent (Platform Event), RecipeAPICallout (Apex Class), RecipeAPI_Cred (External Credential), RecipeAPI (Named Credential), RecipeRestService (Apex Class), vigna bavana (User), SFDC_DevConsole (Debug Level), and RecipeService (External Service Registration).

NAME	TYPE	OBJECT
Calories	Duplicate Rule	Calories
ExternalData	External Data Source	
RecipeEvent	Platform Event	
RecipeAPICallout	Apex Class	
RecipeAPI_Cred	External Credential	
RecipeAPI	Named Credential	
RecipeRestService	Apex Class	
vigna bavana	User	
SFDC_DevConsole	Debug Level	
RecipeService	External Service Registration	

Login IP Ranges

- Restrict user login to specific IP addresses.
- Applied at **Profile level** for trusted networks.

Audit Trail

- Tracks configuration changes in Salesforce (up to 180 days history).
- Example: Field added, validation rule changed, etc.

The screenshot shows the Salesforce Setup Audit Trail page. The left sidebar contains the Setup menu with categories like Feature Settings, Sales, Lead Intelligence, Salesforce Files, Process Automation, User Interface, Custom Code, Environments, and Security. The main content area is titled "View Setup Audit Trail" and displays a table of the last 20 entries. The table columns are Date, User, Source Namespace Prefix, Action, Section, and Delegate User. The entries show various security and configuration changes made by the user yigna.bavana07955@agentforce.com, including setting session security levels, creating rules, and installing packages.

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/26/2025, 8:06:25 AM PDT	yigna.bavana07955@agentforce.com		Session Security Level for Multi-Factor Authentication was set to High Assurance	Session Settings	
9/26/2025, 8:06:25 AM PDT	yigna.bavana07955@agentforce.com		Session Security Level for Passwordless Login was set to Standard	Session Settings	
9/26/2025, 8:06:25 AM PDT	yigna.bavana07955@agentforce.com		Session Security Level for Lightning Login was set to Standard	Session Settings	
9/26/2025, 8:06:25 AM PDT	yigna.bavana07955@agentforce.com		Session Security Level for Activation was set to Standard	Session Settings	
9/26/2025, 8:06:25 AM PDT	yigna.bavana07955@agentforce.com		Session Security Level for Delegated Authentication was set to Standard	Session Settings	
9/26/2025, 8:06:25 AM PDT	yigna.bavana07955@agentforce.com		Session Security Level for Username Password was set to Standard	Session Settings	
9/26/2025, 7:41:07 AM PDT	yigna.bavana07955@agentforce.com		For duplicate rule Calories, changed evaluation criteria.	Duplicate Rule	
9/26/2025, 7:41:07 AM PDT	yigna.bavana07955@agentforce.com		Created new 01f0000029Kiv duplicate rule "Calories". Set "Record-Level Security" to "Enforce sharing rules"	Duplicate Rule	
9/26/2025, 7:15:48 AM PDT	yigna.bavana07955@agentforce.com		Remote Proxy insert RecipeAPI: https://your-recipe-api-endpoint.com	Security Controls	
9/26/2025, 7:06:51 AM PDT	yigna.bavana07955@agentforce.com		Created a new Salesforce Connect: OData 4.0 external data source: ExternalData	External Objects	
9/26/2025, 7:02:57 AM PDT	yigna.bavana07955@agentforce.com		Added Change Data Capture entity Recipe__c to channel ChangeEvents	Change Data Capture	
9/26/2025, 7:01:28 AM PDT	yigna.bavana07955@agentforce.com		Created custom object: RecipeEvent	Custom Objects	
9/26/2025, 6:56:17 AM PDT	yigna.bavana07955@agentforce.com		Created RecipeAPICallout Apex Class code	Apex Class	
9/26/2025, 6:48:31 AM PDT	Automated Process	sf_com_apps	Installed AppExchange package: Salesforce Connected Apps	Custom Apps	
9/26/2025, 6:48:29 AM PDT	Automated Process	sf_com_apps	Installed AppExchange package: Workbench	Custom Apps	
9/26/2025, 6:48:28 AM PDT			The managed package "Workbench" version "3.0" has not been security reviewed and was installed by user		