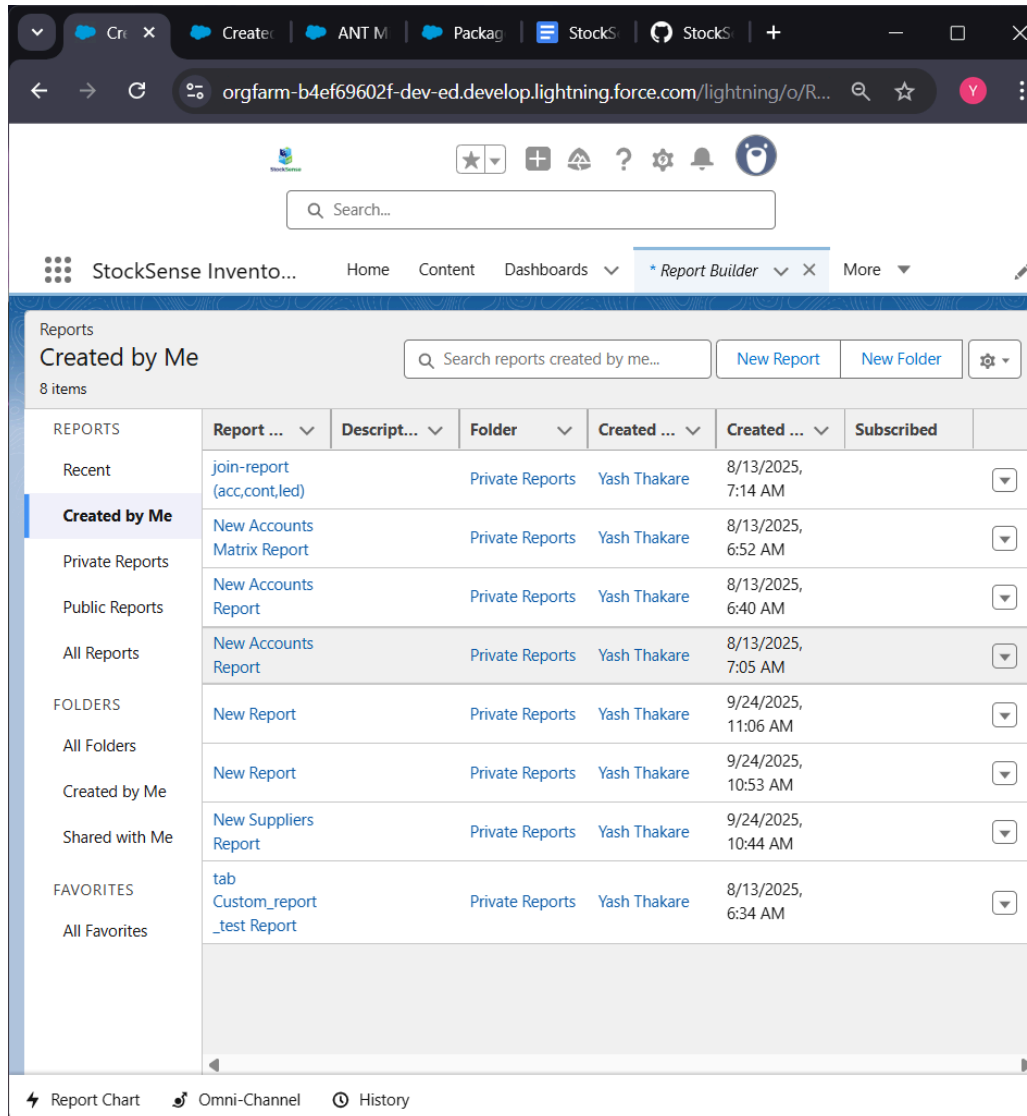


# Phase 9: Reporting, Dashboards & Security Review

- **Reports (Tabular, Summary, Matrix, Joined)** —
- ,-Salesforce → App Launcher → search Reports → open Reports Tab.

## 1. Click New Report. (Tabular, Summary, Matrix, Joined)



The screenshot shows the Salesforce Reports interface. The browser address bar indicates the URL: `orgfarm-b4ef69602f-dev-ed.develop.lightning.force.com/lightning/o/R...`. The page title is "StockSense Invento...". The navigation bar includes "Home", "Content", "Dashboards", and "Report Builder". The "Report Builder" tab is active.

The "Reports" section is titled "Created by Me" and shows 8 items. The table below lists the reports:

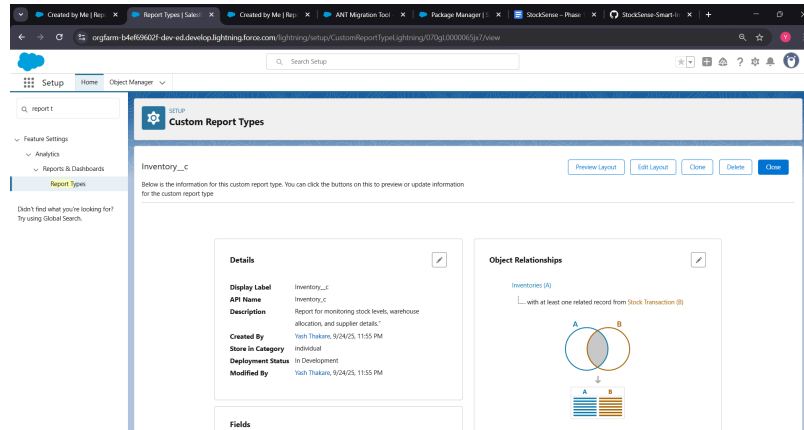
REPORTS	Report ...	Descript...	Folder	Created ...	Created ...	Subscribed
Recent	join-report (acc,cont,led)		Private Reports	Yash Thakare	8/13/2025, 7:14 AM	
Created by Me	New Accounts Matrix Report		Private Reports	Yash Thakare	8/13/2025, 6:52 AM	
Private Reports	New Accounts Report		Private Reports	Yash Thakare	8/13/2025, 6:40 AM	
Public Reports	New Accounts Report		Private Reports	Yash Thakare	8/13/2025, 7:05 AM	
All Reports	New Report		Private Reports	Yash Thakare	9/24/2025, 11:06 AM	
FOLDERS	New Report		Private Reports	Yash Thakare	9/24/2025, 10:53 AM	
All Folders	New Suppliers Report		Private Reports	Yash Thakare	9/24/2025, 10:44 AM	
Created by Me	tab Custom_report _test Report		Private Reports	Yash Thakare	8/13/2025, 6:34 AM	
Shared with Me						
FAVORITES						
All Favorites						

The bottom of the page shows a navigation bar with "Report Chart", "Omni-Channel", and "History" options.

- **Report Types**

Salesforce Setup → Quick Find → **Report Types**

Click **New Custom Report Type**



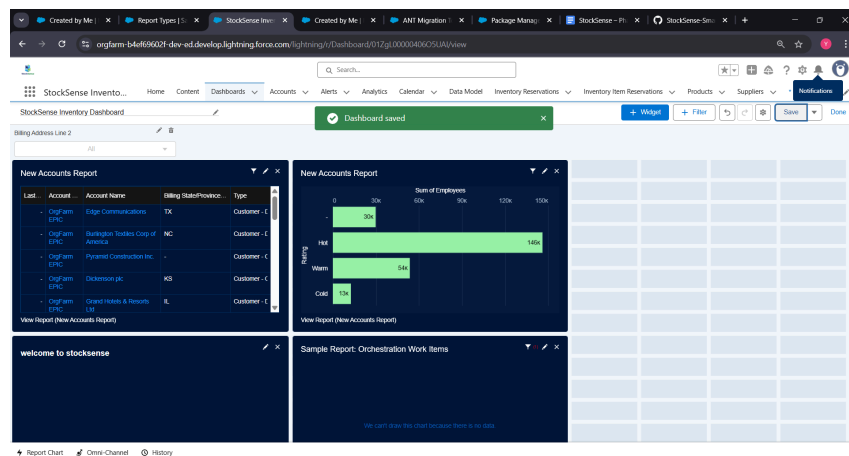
- **Dashboards:-**

**Dashboard Name** → e.g., **StockSense Inventory Dashboard**

**Description** → e.g., **Visual representation of stock levels, warehouse allocation, and suppliers**

**Folder** → Choose a folder where this dashboard will be stored (like **StockSense Dashboards**)

Click **Create** → opens **Dashboard Builder**



# Dynamic Dashboards

Go to **Reports** → **New Report**

Select **Inventory Reports** (or your custom object report type)

Add filters:

- **Show Me = My Inventories** (this ensures only records owned by the logged-in user appear)
- Or filter on **Assigned\_Agent\_\_c = My User**

Add columns: Product, Warehouse, Stock\_Quantity, Reserved\_Quantity, etc.

Save the report.

Go to **Dashboards** → **New Dashboard**

Add a **Report Chart** component → choose the report you built above.

Configure chart type (e.g., bar chart for Stock by Product, pie chart for Stock by Warehouse).

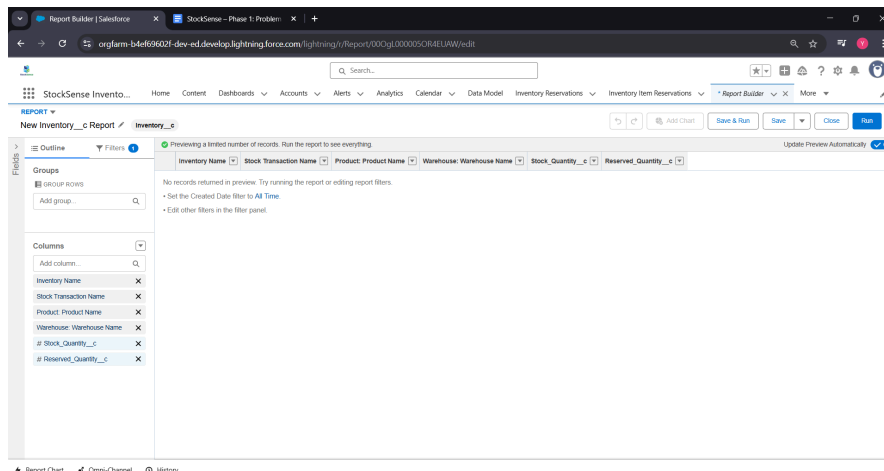
Save.

Open your Dashboard → **Edit**

In the top-right, find **“View Dashboard As”**

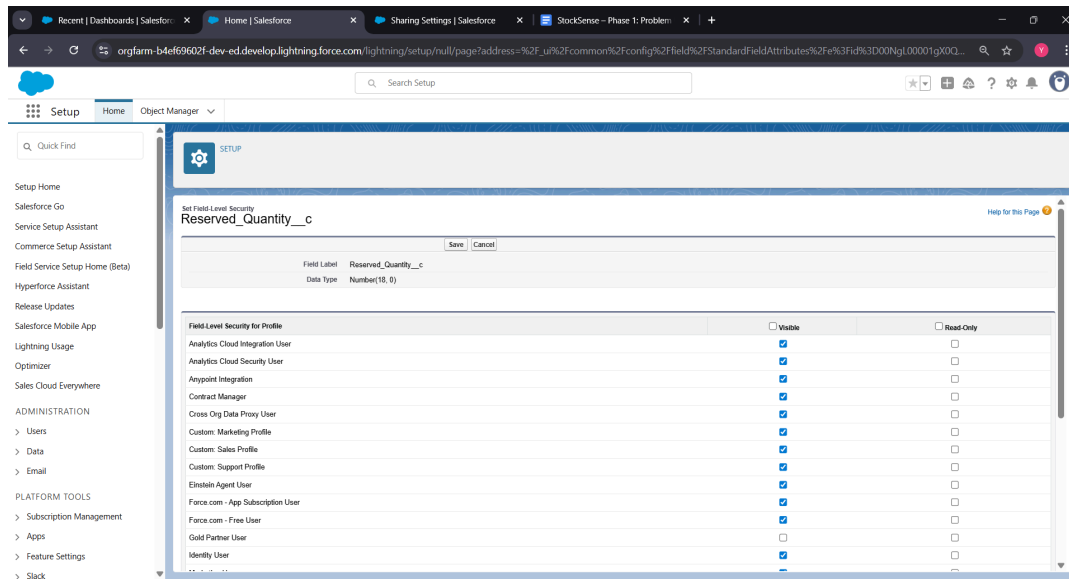
- Choose **“Run as Logged-in User”** (Dynamic Dashboard)

Save.





# Field-Level Security

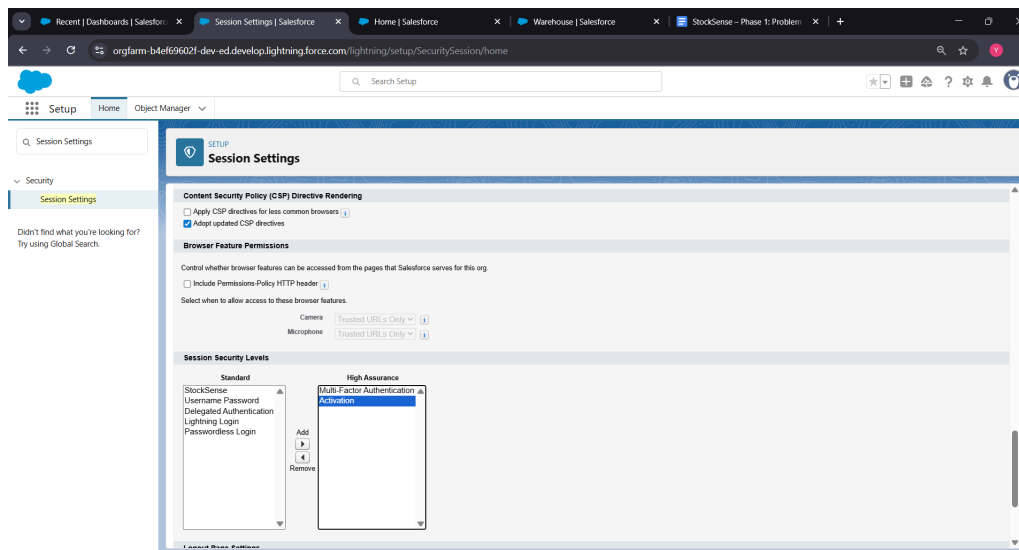


## • Session Settings

Go to Setup.

In the Quick Find box, type Session Settings.

Click Session Settings under Security.

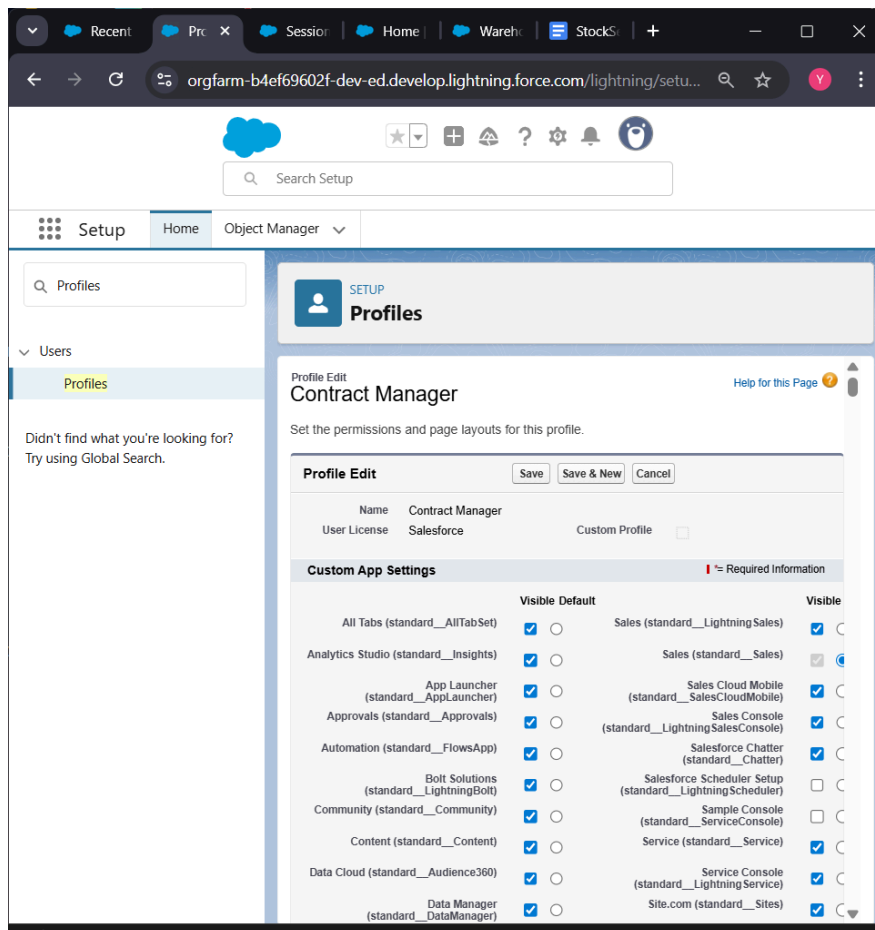


## • Login IP Ranges

ple (for office network):

- Start IP = 192.168.1.1
- End IP = 192.168.1.255

Description: Office Network Access



## • Audit Trail:-

**Date** – when the change was made.

**User** – who made the change.

**Action** – what was changed (e.g., “Modified Sharing Settings”, “Added Field Reserved\_Quantity\_\_c”).

**Section** – Setup area (Profiles, Fields, Security, etc.).

Recent | Dashboard

View Setup Audit Trail

Profiles | Salesforce

Session Settings | Salesforce

Home | Salesforce

Warehouse | Salesforce

StockSense - Phase

orgfarm-b40f69602f-dev-ed.develop.lightning.force.com/lightning/setup/SecurityEvents/home

Search Setup

Setup

Home

Object Manager

view se

Feature Settings

Sales

Contact Intelligence Setup

Lead Intelligence View Setup

Security

View Setup Audit Trail

Didn't find what you're looking for?  
Try 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).

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/25/2025, 4:57:25 AM PDT	yashthakane413749@aperforce.com		Session Security Level for Multi-Factor Authentication was set to High Assurance	Session Settings	
9/25/2025, 4:57:25 AM PDT	yashthakane413749@aperforce.com		Session Security Level for StockSense was set to Standard	Session Settings	
9/25/2025, 4:57:25 AM PDT	yashthakane413749@aperforce.com		Session Security Level for Passwordless Login was set to Standard	Session Settings	
9/25/2025, 4:57:25 AM PDT	yashthakane413749@aperforce.com		Session Security Level for Lightning Login was set to Standard	Session Settings	
9/25/2025, 4:57:25 AM PDT	yashthakane413749@aperforce.com		Session Security Level for Activation was set to Standard	Session Settings	
9/25/2025, 4:57:25 AM PDT	yashthakane413749@aperforce.com		Session Security Level for Delegated Authentication was set to Standard	Session Settings	
9/25/2025, 4:57:25 AM PDT	yashthakane413749@aperforce.com		Session Security Level for Username Password was set to Standard	Session Settings	
9/25/2025, 4:52:24 AM PDT	yashthakane413749@aperforce.com		Changed profile Solution Manager: field-level security for Inventory__Reserved__Quantity__c was changed from Read/Write to Read Only	Manage Users	
9/25/2025, 4:45:48 AM PDT	yashthakane413749@aperforce.com		Finished Organization-Wide Defaults update	Sharing Defaults	
9/25/2025, 4:45:40 AM PDT	yashthakane413749@aperforce.com		Changed default internal access for Warehouse from Public Read/Write to Public Read Only	Sharing Defaults	
9/25/2025, 4:45:40 AM PDT	yashthakane413749@aperforce.com		Changed default internal access for Product from Public Read/Write to Public Read Only	Sharing Defaults	
9/25/2025, 4:45:28 AM PDT	yashthakane413749@aperforce.com		Started default internal access update for Product from Public Read/Write to Public Read Only	Sharing Defaults	
9/25/2025, 4:45:28 AM PDT	yashthakane413749@aperforce.com		Started default internal access update for Warehouse from Public Read/Write to Public Read Only	Sharing Defaults	