

## Phase 9 – Reporting, Dashboards & Security Review

## 1. Reports

- Created reports to track lead and engagement metrics:

1. **Top Leads by Score**→ Shows top leads with Lead Score > 70.

Report: Leads

Top Leads by Score

Total Records

1

Total Lead Score


70

	First Name <div></div>	Last Name <div></div>	Lead Owner <div></div>	Lead Score <div>↓</div> <div></div>
1	katik	umale	Aanya Badoniya	70
2				70

2. **Lead Score Overview** → Shows each leads score in descending order

Report: Leads						
Lead Score Overview						
Total Records	Total Interest Score	Total Engagement Score	Total Lead Score			
10	550	105	283			
<input type="checkbox"/> Score Range ↑	First Name	Last Name	Lead Owner	Interest Score	Engagement Score	Lead Score ↓
<input type="checkbox"/> low (5)	Priya	Sharma	Aanya Badoniya	50	0	20
	Karan	Gupta	Aanya Badoniya	50	0	20
	Rahul	Mehta	Aanya Badoniya	0	0	0
	Sneha	Iyer	Aanya Badoniya	0	0	0
	Rohan	Singh	Aanya Badoniya	0	0	0
Subtotal				100	0	40
<input type="checkbox"/> medium (4)	Atharva	gulhane	Aanya Badoniya	50	50	50
	jatin	awankar	Aanya Badoniya	100	5	43
	Arjun	Verma	Aanya Badoniya	100	0	40
	Neha	Kapoor	Aanya Badoniya	100	0	40
Subtotal				350	55	173
<input type="checkbox"/> high (1)	katik	umale	Aanya Badoniya	100	50	70
Subtotal				100	50	70
7 of 10				550	105	283
Row Counts	Detail Rows	Subtotals	Grand Total			

3. **Lead Engagement Report** → Shows number of engagements and type of engagement of each lead.



Report: Lead Engagements  
**Lead Engagement Report**

Total Records  
8

Lead	Activity Type →	Call	email	meeting	Total
<input type="checkbox"/> Atharva gulhane	Record Count	2	0	1	3
<input type="checkbox"/> jatin awankar	Record Count	0	1	0	1
<input type="checkbox"/> katik umale	Record Count	1	3	1	5
Total	Record Count	3	4	2	9

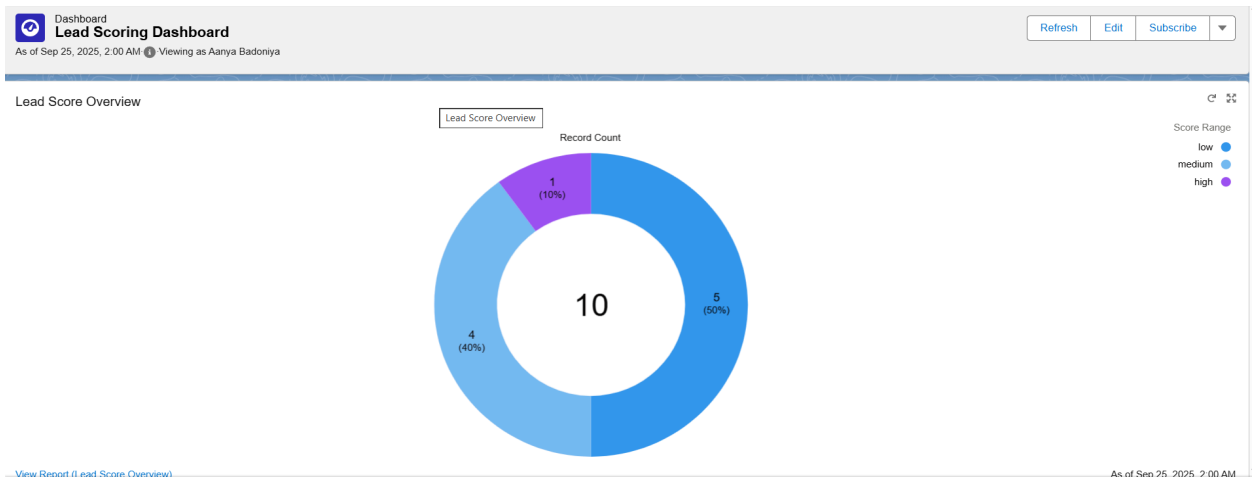
Details (9 Rows) Click an intersection in the table above to filter details.

	Lead Engagement: Engagement ID	Lead Engagement: Owner Name
1	ENG-0007	Aanya Badoniya
2	ENG-0005	Aanya Badoniya
3	ENG-0002	Aanya Badoniya
4	ENG-0008	Aanya Badoniya
5	ENG-0006	Aanya Badoniya

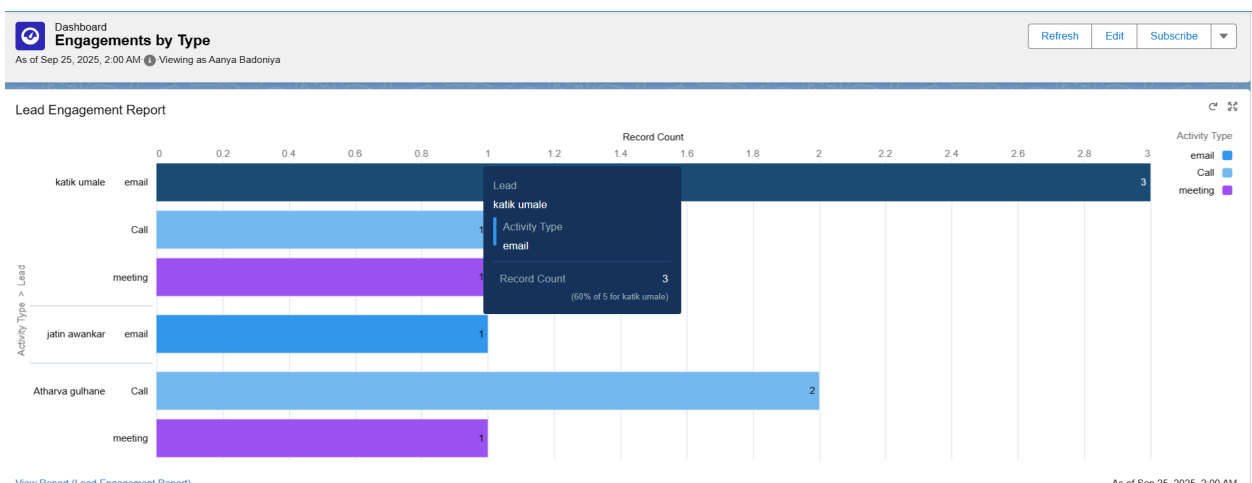
Row Counts ☒ Detail Rows ☒ Grand Total ☒ Stacked Summaries ☒

## 2. Dashboards

- Created dashboards for real-time visualization of lead funnel and engagement trends:
  1. **Lead Scoring Dashboard** →Shows overall lead scores, trends, and distribution to help prioritize high-quality leads.



2. **Engagements by Type** → Displays which engagement activities (calls, emails, meetings, etc.) leads are interacting with the most.



3. **Top Leads** → Highlights the highest-scoring or most engaged leads for immediate follow-up.

Dashboard  
**Top Leads**  
As of Sep 25, 2025, 2:00 AM Viewing as Aanya Badoniya

Refresh Edit Subscribe

Top Leads

First Name ↑	Last Name	Lead Owner	Lead Score
katik	umale	Aanya Badoniya	70

### 3. Security Review

- **Field-Level Security (FLS):**

- Restricted sensitive fields like Lead\_Score\_\_c to Sales Managers and Agents.

The screenshot shows the 'Set Field-Level Security' page for the 'Lead Score' field. The field is of type 'Number(18, 0)'. Below the field information, there is a table titled 'Field-Level Security for Profile' with columns for 'Visible' and 'Read-Only' settings for various user profiles.

Field Label	Data Type
Lead Score	Number(18, 0)

Field-Level Security for Profile	Visible	Read-Only
Read Only	<input type="checkbox"/>	<input type="checkbox"/>
Sales Agent	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Salesforce API Only System Integrations	<input type="checkbox"/>	<input type="checkbox"/>
Sales Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales Rep	<input type="checkbox"/>	<input type="checkbox"/>
Silver Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input type="checkbox"/>	<input type="checkbox"/>
Standard User	<input type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input type="checkbox"/>	<input type="checkbox"/>
Work.com Only User	<input type="checkbox"/>	<input type="checkbox"/>

- **Sharing Settings:**

- Leads are **Private** (OWD) → visible only to owner or shared via rules.

#### Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

The screenshot shows the 'Sharing Settings' page. It includes a dropdown menu for 'Manage sharing settings for:' set to 'All Objects'. Below this is a section for 'Default Sharing Settings' with a table showing organization-wide defaults for 'Lead', 'Account and Contract', and 'Contact' objects.

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

- **Profiles & Permission Sets:**

- Agents → Read/Edit on Leads assigned to them.
- Managers → Read/Edit on all team leads.

- Executives → Read-only access to reports/dashboards.
- **Login Policies:**
  - Login IP ranges restricted.
  - Login hours configured for agents.

 **SETUP**  
**Profiles**


Profile  
**Sales Agent** [Help for this Page](#)

  [Clone](#) [Delete](#) [Edit Properties](#)



Profile Overview > **Login IP Ranges**

**Login IP Ranges** [Add IP Ranges](#)

Action	IP Start Address	IP End Address	Description
<a href="#">Edit</a>   <a href="#">Delete</a>	192.168.1.1	192.168.1.255	

 **SETUP**  
**Profiles**

Profile  
**Sales Agent** [Help for this Page](#)

  [Clone](#) [Delete](#) [Edit Properties](#)

Profile Overview > **Login Hours**

**Login Hours** [Edit](#)

Day	Start Time	End Time
Sunday	All Day	All Day
Monday	8:30 PM PDT	5:30 AM PDT
Tuesday	8:30 PM PDT	5:30 AM PDT
Wednesday	8:30 PM PDT	5:30 AM PDT
Thursday	8:30 PM PDT	5:30 AM PDT
Friday	8:30 PM PDT	5:30 AM PDT
Saturday	All Day	All Day