

Phase 9: Reporting, Dashboards & Security

Review

In this phase, we focused on Salesforce reporting and dashboards to provide insights into CRM data, and performed a security review to ensure proper data access, compliance, and governance. Reports and dashboards give actionable insights to users, while security controls ensure that data is safe and accessible only to authorized users.

1) Reports

Salesforce provides different report formats to analyze CRM data:

- Tabular Reports → Simple list of records. Example: All Leads created this month.
- Summary Reports → Grouped records with subtotals. Example: Leads grouped by Source or Owner.
- Matrix Reports → Grouped by rows and columns. Example: Opportunities by Stage vs. Owner.
- Joined Reports → Combine multiple report types into one view. Example: Leads and Enrollments for conversion tracking.

2) Report Types

- Standard Report Types → Provided by Salesforce (e.g., Leads, Accounts, Opportunities).
- Custom Report Types → Created for specific project needs (e.g., Leads with Enrollments, Partner Engagement with Opportunities).

3) Dashboards

Dashboards visualize report data using components:

- Bar Charts → e.g., Leads by Source.
- Line Charts → e.g., Opportunities over time.
- Donut Charts → e.g., Case distribution by Status.
- Tables → e.g., Top 10 Performing Counselors/Executives.

Dynamic Dashboards: Allow users to view data according to their own permissions.

Example: A counselor sees only their own leads, while a manager can see the entire team's performance.

4) Security Review

a) Sharing Settings:

- Setup → Sharing Settings → Organization-Wide Defaults (OWD).
- Example: Leads = Private, Contacts = Controlled by Parent.
- Sharing rules allow managers to access counselors' leads.

b) Field Level Security (FLS):

- Controls visibility/editability of fields.
- Example: On Opportunity object, Discount field visible only to Admin/Manager.

c) Session Settings & Login IP Ranges:

- Setup → Security → Session Settings → Control session timeout, enforce HTTPS.
- Login IP Ranges restrict logins to secure networks.

d) Audit Trail:

- Setup → View Setup Audit Trail.
- Tracks last 20 changes (e.g., field creation, validation rules).
- Useful for compliance and governance.

Outcome

- Comprehensive reporting with tabular, summary, matrix, and joined reports.
- Dashboards created with key performance charts.
- Dynamic dashboards ensure role-based visibility.
- Security implemented via OWD, FLS, IP restrictions, and audit trail.
- CRM is analytics-ready and secure for end users.