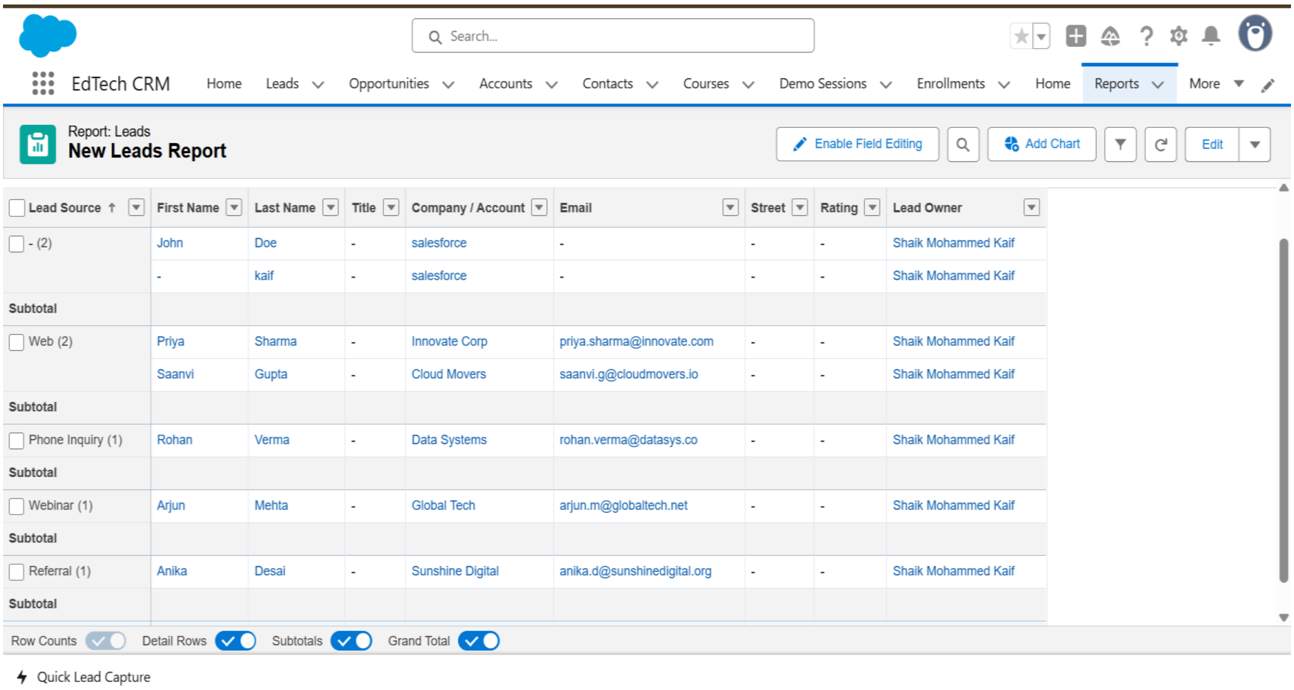
Phase 9: Reporting, Dashboards & Security Review

The first step is to build reports that give managers visibility into their sales data. We'll start with the **"Leads by Source"** report.

Create the 'Leads by Source' Report

1. Go to the **Reports** tab in your EdTech CRM app and click **New Report**.
2. For the report type, search for and select **Leads**, then click **Start Report**.
3. The report builder will open. On the left side, find the **"Group Rows"** search box. Type Lead Source and select it. This will group all your leads by their source.
4. You can add or remove columns as needed using the "Columns" section.
5. Click **Run** in the top-right to see your report.
6. Click **Save**.
   - **Report Name**: Leads by Source
   - **Folder**: Select "Public Reports" so everyone can see it.
   - Click **Save**.



We'll create a new dashboard and add the first component, the "Sales Funnel".

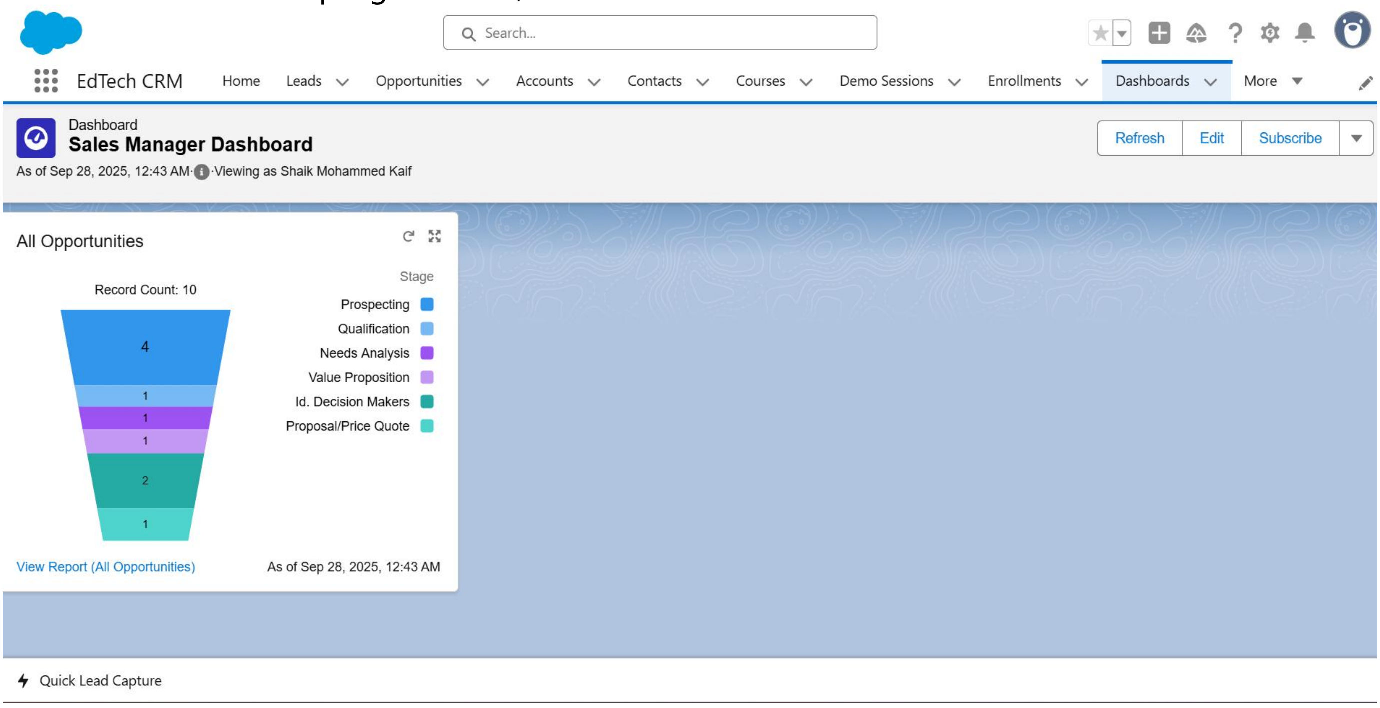
Create a New Dashboard

1. Go to the Dashboards tab in your EdTech CRM app and click New Dashboard.
2. Fill in the details:
   - Name: Sales Manager Dashboard
   - Folder: Select "Public Dashboards".
3. Click Create.

Add the Sales Funnel Component

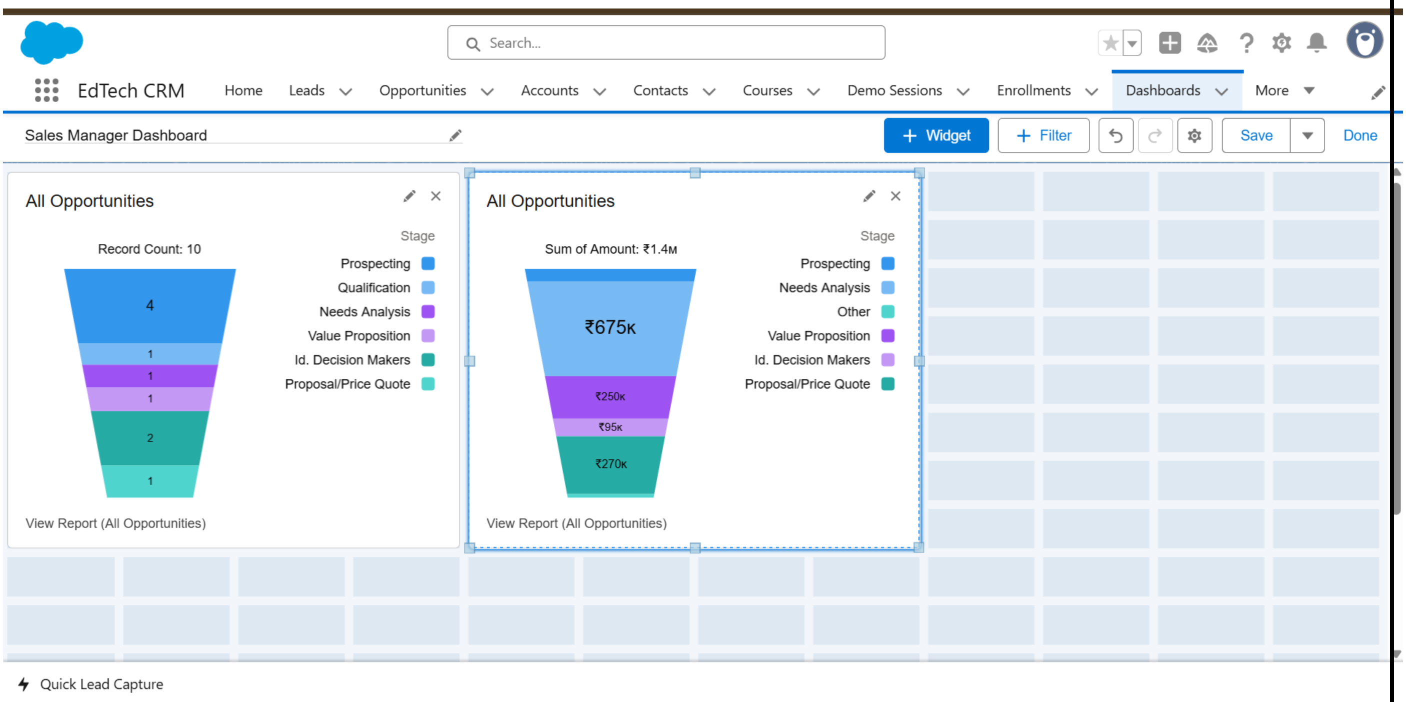
1. You are now on a blank dashboard canvas. Click the + Component button.

2. In the "Select Report" window, search for and select a standard Opportunities report.
3. Under "Display As," select the Funnel chart type funnel icon.
4. Click Add.
5. You will see the new funnel component on your dashboard. You can drag the corners to resize it.
6. Click Save in the top-right corner, then click Done.



Add the Sales Funnel Component

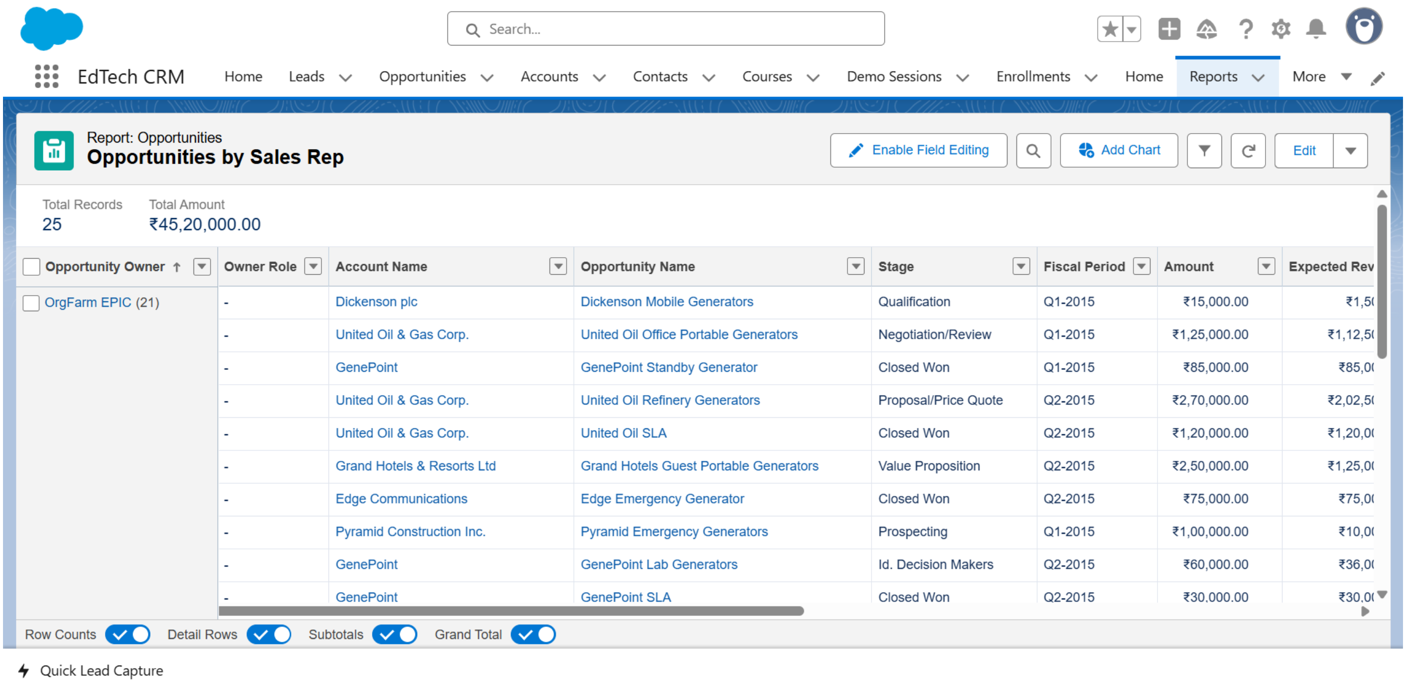
1. Go back to your Sales Manager Dashboard and click Edit.
2. Click the + Widget button and choose Chart or Table.
3. Select your updated All Opportunities report and click Select.
4. In the component editor, configure the chart:
   - Under "Display As," select the Funnel chart icon ▼ .
   - For the Value, select Sum of Amount.
   - The Group By should already be set to Stage.
5. Click the Add button.



The next component to add is for "Top Sales Reps".
To do this, we first need to create a new report that groups opportunities by their owner.

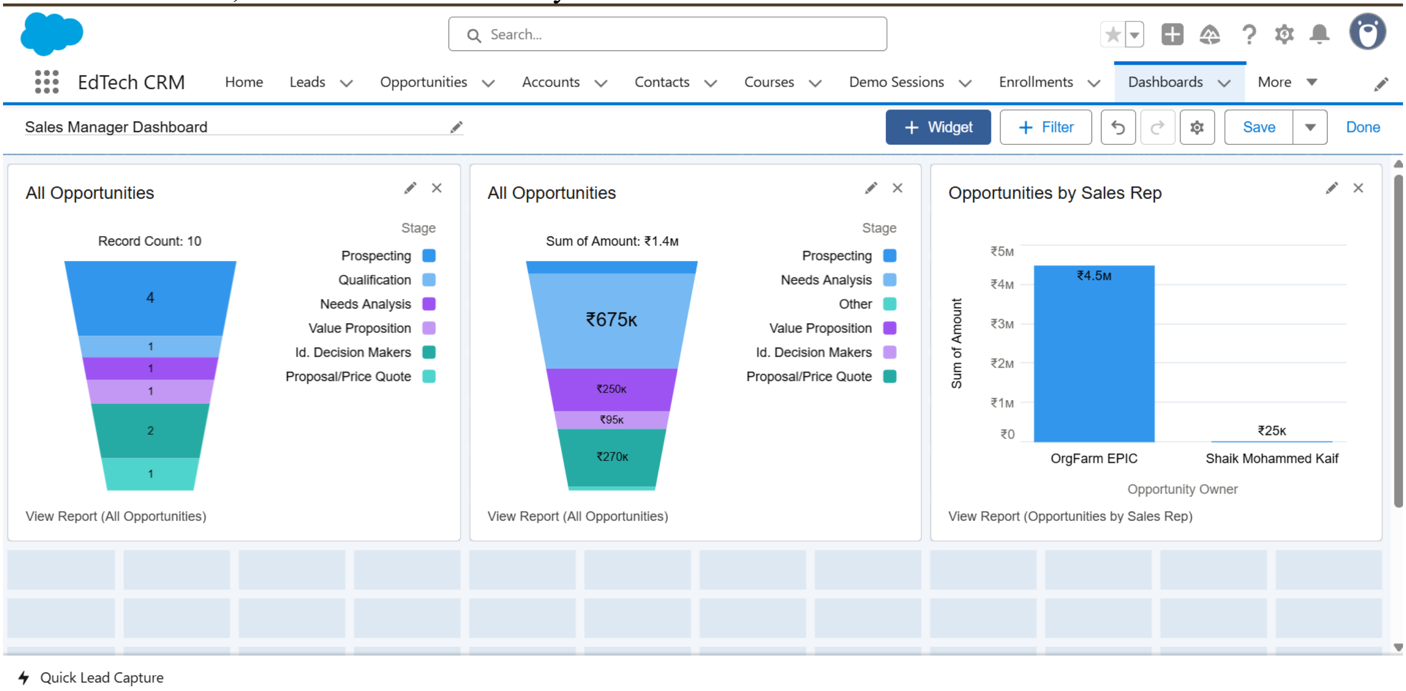
📊 Step 1: Create the 'Opps by Rep' Report

1. Go to the Reports tab and click New Report.
2. Choose the Opportunities report type and click Start Report.
3. In the "Group Rows" search box, type Opportunity Owner and select it.
4. Make sure the Amount column is summarized by Sum.
5. Click Save & Run.
    - Report Name: Opportunities by Sales Rep
    - Folder: Public Reports
    - Click Save.



Step 2: Add the 'Top Sales Reps' Component

1. Go back to your Sales Manager Dashboard and click Edit.
2. Click the + Widget button and choose Chart or Table.
3. Select your new Opportunities by Sales Rep report.
4. Configure the component:
    - Under "Display As," select a Bar Chart .
    - Y-Axis: Sum of Amount
    - X-Axis: Opportunity Owner
5. Click Add, then Save and Done on your dashboard.



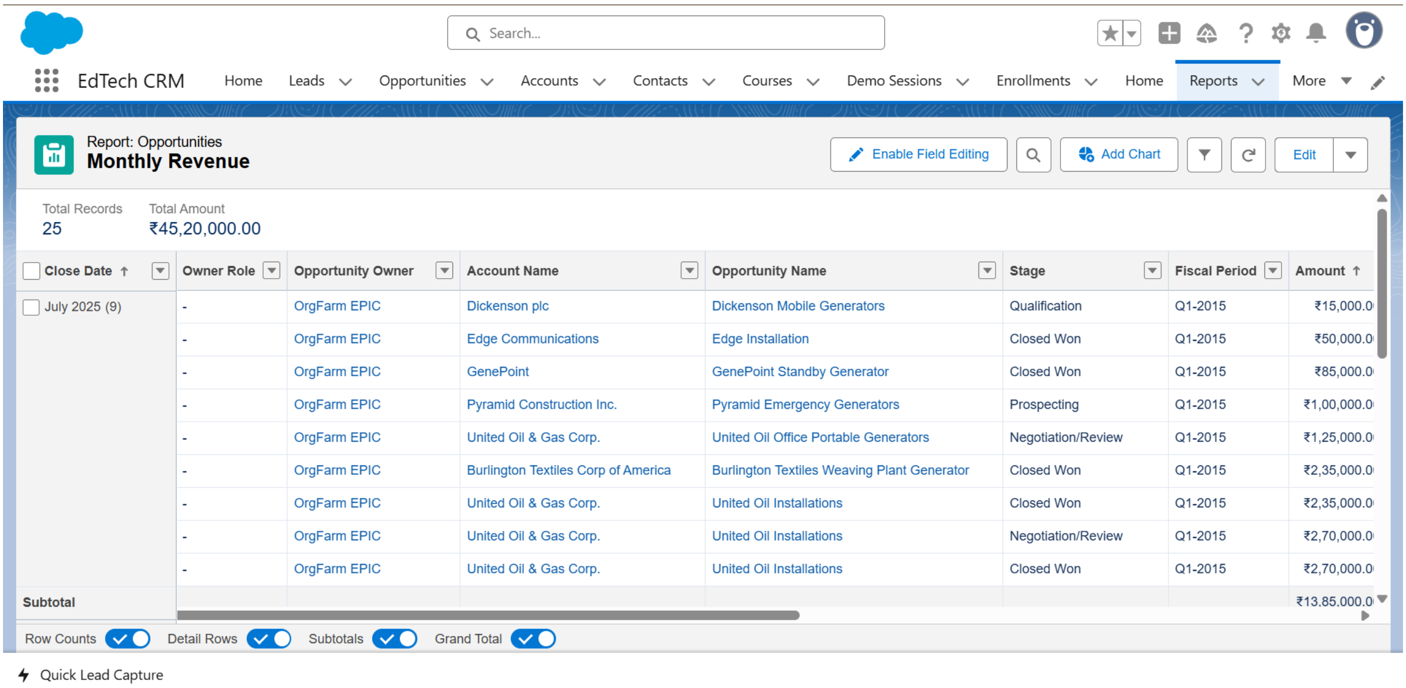
The last component for your dashboard is "Monthly Revenue".
First, we need to create a new report that groups your opportunities by their close date.

Step 1: Create the 'Monthly Revenue' Report

1. Go to the Reports tab → New Report.
2. Choose the Opportunities report type → Start Report.

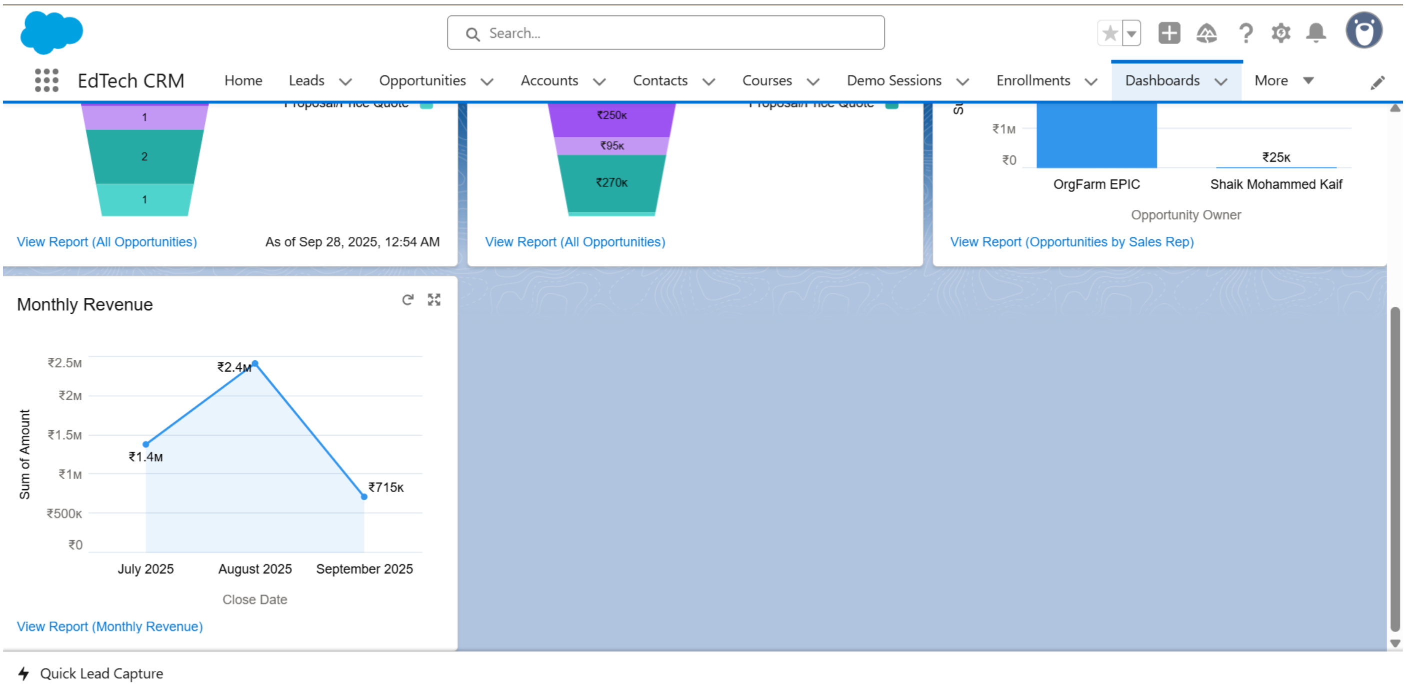
3. In the "Group Rows" search box, select Close Date.
4. After the report is grouped, click the small dropdown arrow ▼ on the "Close Date" column header. Go to Group Date By → Calendar Month.

5. Make sure the Amount column is summarized by Sum.
6. Click Save & Run.
    - Report Name: Monthly Revenue
    - Folder: Public Reports
    - Click Save.



Step 2: Add the 'Monthly Revenue' Component

1. Go back to your Sales Manager Dashboard and click Edit.
2. Click + Widget → Chart or Table.
3. Select your new Monthly Revenue report.
4. Configure the component:
    - Under "Display As," select a Line Chart.
    - Y-Axis: Sum of Amount
    - X-Axis: Close Date
5. Click Add, then Save and Done on your dashboard.



The final task in Phase 9 is the Security Review. The goal is to confirm that our settings restrict student record access while ensuring managers have visibility into their team's work.
This is a check of the settings we configured in Phase 2.

🔒 Security Review Checklist

1. Verify Organization-Wide Defaults (OWD)

1. Go to Setup → Sharing Settings.
2. Find the Opportunity and Enrollment objects. Confirm that their "Default Internal Access" is set to Private. This ensures that, by default, only the record owner can see these records.
3. Find the Contact object. Confirm its default access is Controlled by Parent. This means a user must have access to the Account to see the related student Contact.

2. Verify Role Hierarchy

1. Go to Setup → Roles.
2. Confirm that your role hierarchy is set up correctly, with the Sales Executive role reporting to the Manager role.

Because the role hierarchy is correct, managers will automatically be able to see all the records owned by the sales executives below them. This satisfies the "ensure Manager visibility" requirement**.**