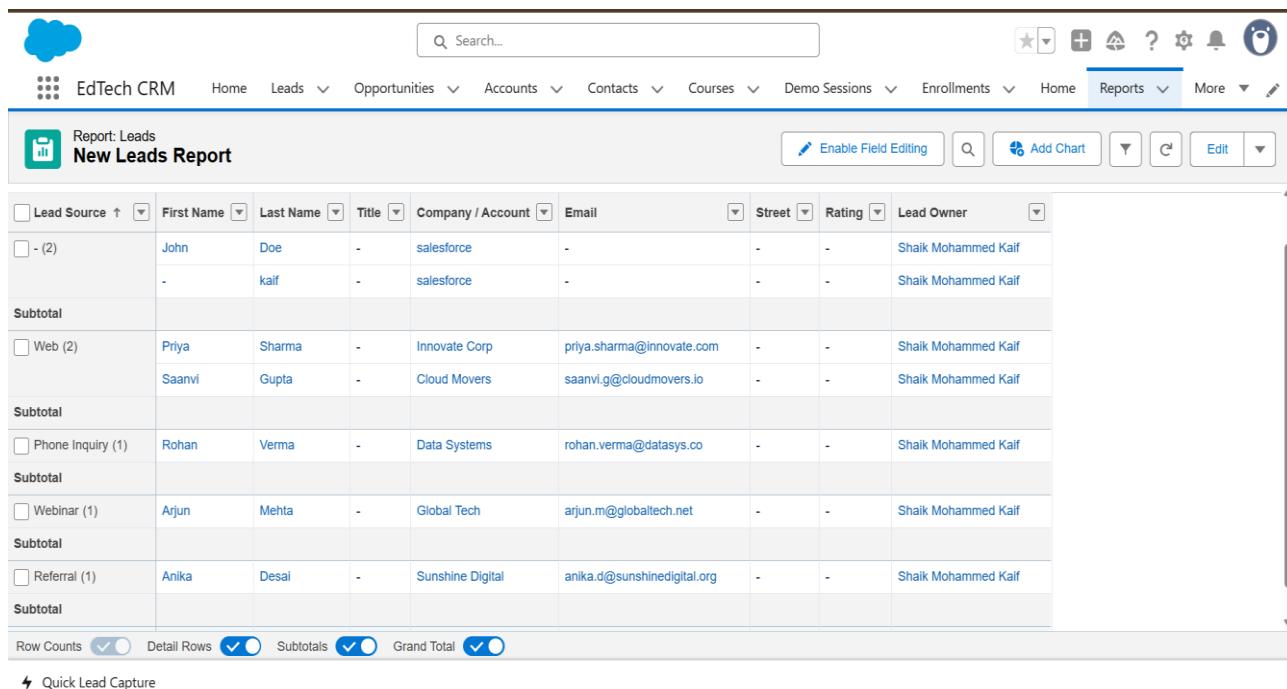


## Phase 9: Reporting, Dashboards & Security Review

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**.
  - o **Report Name:** Leads by Source
  - o **Folder:** Select "Public Reports" so everyone can see it.
  - o Click **Save**.



Lead Source	First Name	Last Name	Title	Company / Account	Email	Street	Rating	Lead Owner
- (2)	John	Doe	-	salesforce	-	-	-	Shaik Mohammed Kaif
		kaif	-	salesforce	-	-	-	Shaik Mohammed Kaif
Subtotal								
Web (2)	Priya	Sharma	-	Innovate Corp	priya.sharma@innovate.com	-	-	Shaik Mohammed Kaif
	Saanvi	Gupta	-	Cloud Movers	saanvi.g@cloudmovers.io	-	-	Shaik Mohammed Kaif
Subtotal								
Phone Inquiry (1)	Rohan	Verma	-	Data Systems	rohan.verma@datasys.co	-	-	Shaik Mohammed Kaif
Subtotal								
Webinar (1)	Arjun	Mehta	-	Global Tech	arjun.m@globaltech.net	-	-	Shaik Mohammed Kaif
Subtotal								
Referral (1)	Anika	Desai	-	Sunshine Digital	anika.d@sunshinedigital.org	-	-	Shaik Mohammed Kaif
Subtotal								
Row Counts	Detail Rows	Subtotals	Grand Total					

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

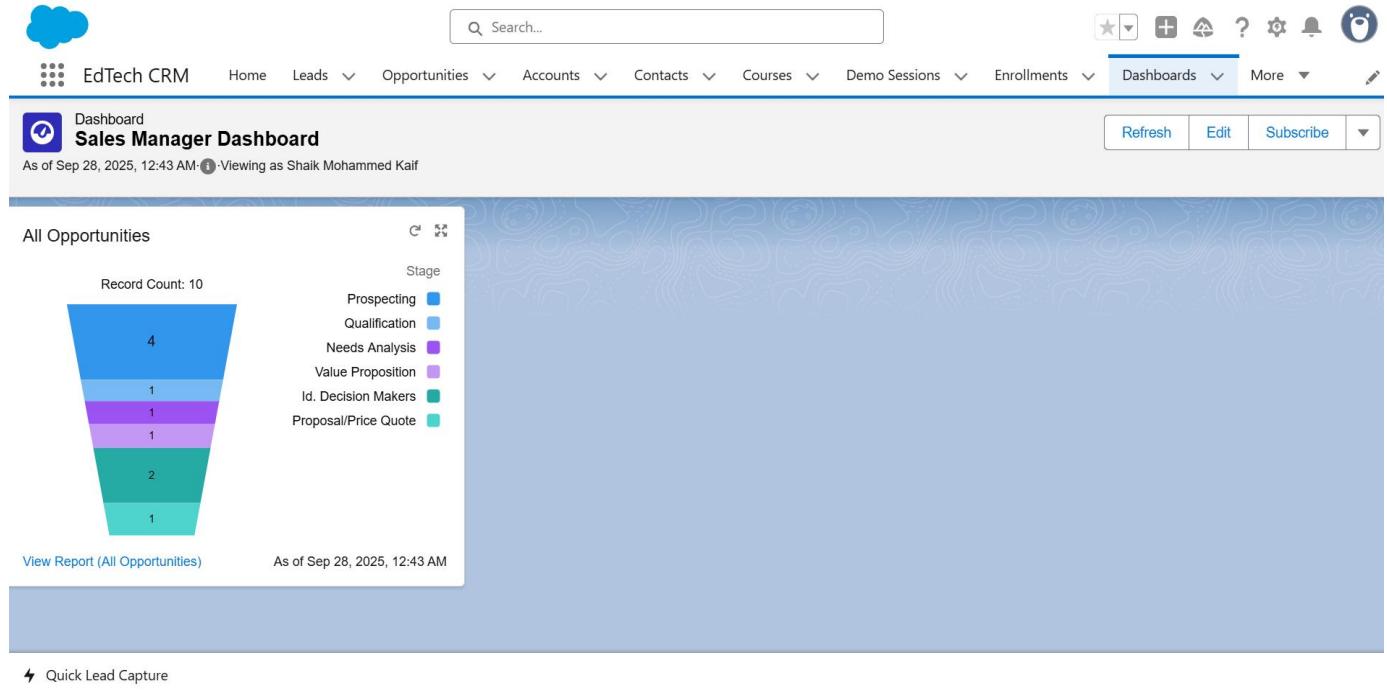
### Create a New Dashboard

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

Add the Sales Funnel Component

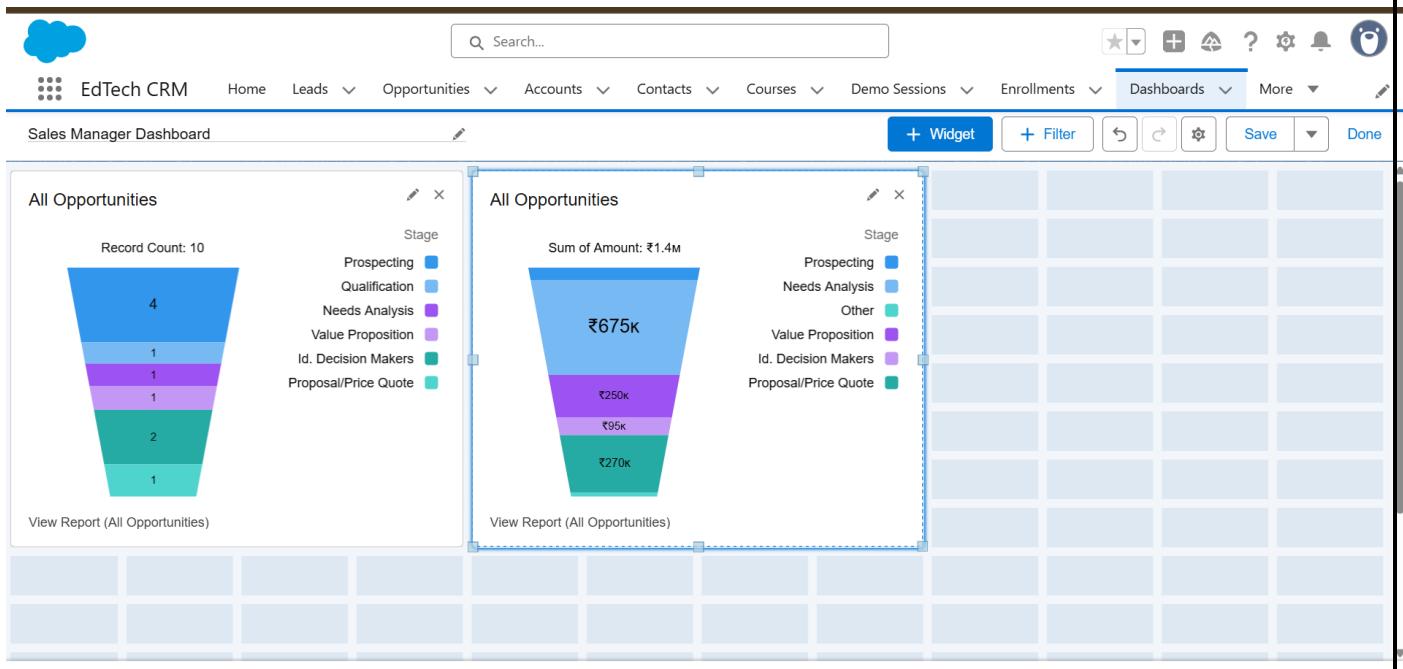
1. You are now on a blank dashboard canvas. Click the **+** Component button.

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:
  - o Under "Display As," select the Funnel chart icon ▼ .
  - o For the Value, select Sum of Amount.
  - o 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.
  - o Report Name: Opportunities by Sales Rep
  - o Folder: Public Reports
  - o Click Save.



Search...



EdTech CRM

Home Leads Opportunities Accounts Contacts Courses Demo Sessions Enrollments Home Reports More

Report: Opportunities  
**Opportunities by Sales Rep**

Total Records 25 Total Amount ₹45,20,000.00

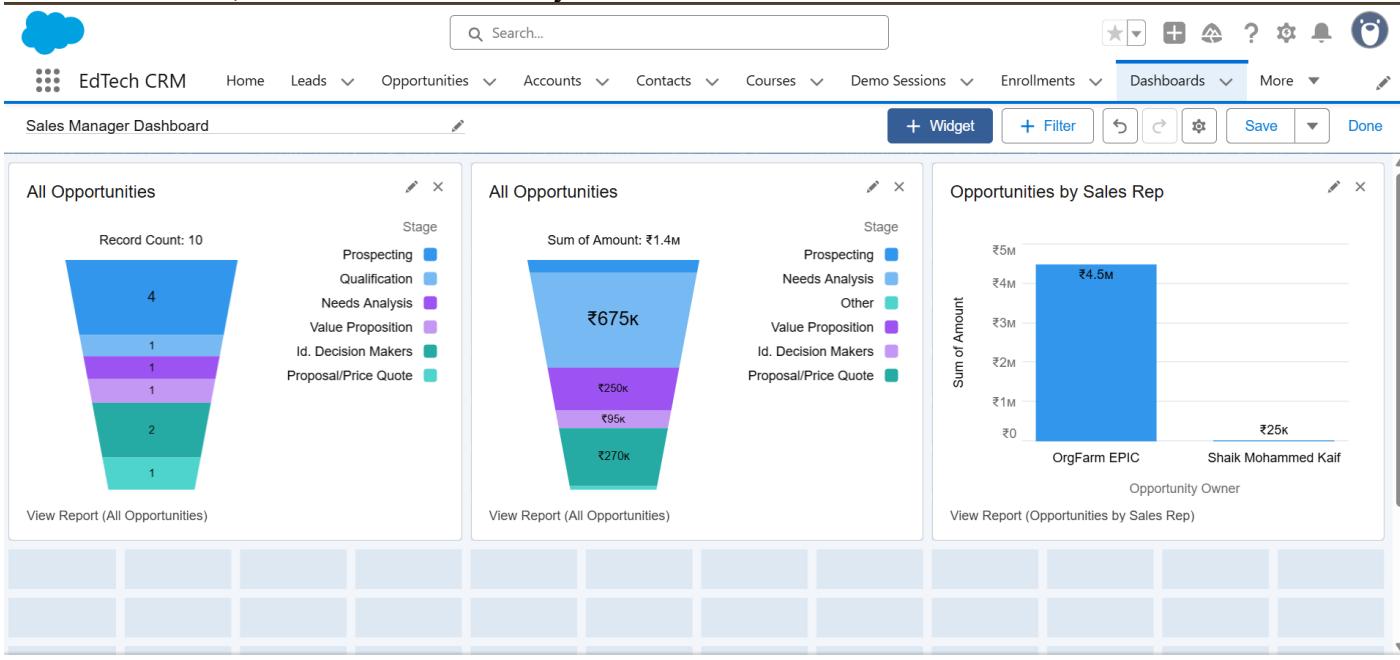
Opportunity Owner	Owner Role	Account Name	Opportunity Name	Stage	Fiscal Period	Amount	Expected Rev
OrgFarm EPIC (21)	-	Dickenson plc	Dickenson Mobile Generators	Qualification	Q1-2015	₹15,000.00	₹1,50,000.00
	-	United Oil & Gas Corp.	United Oil Office Portable Generators	Negotiation/Review	Q1-2015	₹1,25,000.00	₹1,12,50,000.00
	-	GenePoint	GenePoint Standby Generator	Closed Won	Q1-2015	₹85,000.00	₹85,00,000.00
	-	United Oil & Gas Corp.	United Oil Refinery Generators	Proposal/Price Quote	Q2-2015	₹2,70,000.00	₹2,02,50,000.00
	-	United Oil & Gas Corp.	United Oil SLA	Closed Won	Q2-2015	₹1,20,000.00	₹1,20,00,000.00
	-	Grand Hotels & Resorts Ltd	Grand Hotels Guest Portable Generators	Value Proposition	Q2-2015	₹2,50,000.00	₹1,25,00,000.00
	-	Edge Communications	Edge Emergency Generator	Closed Won	Q2-2015	₹75,000.00	₹75,00,000.00
	-	Pyramid Construction Inc.	Pyramid Emergency Generators	Prospecting	Q1-2015	₹1,00,000.00	₹10,00,000.00
	-	GenePoint	GenePoint Lab Generators	Id. Decision Makers	Q2-2015	₹60,000.00	₹36,00,000.00
	-	GenePoint	GenePoint SLA	Closed Won	Q2-2015	₹30,000.00	₹30,00,000.00

Row Counts Detail Rows Subtotals Grand Total

Quick Lead Capture

## 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:
  - o Under "Display As," select a Bar Chart .
  - o Y-Axis: Sum of Amount
  - o 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.
  - o Report Name: Monthly Revenue
  - o Folder: Public Reports
  - o Click Save.

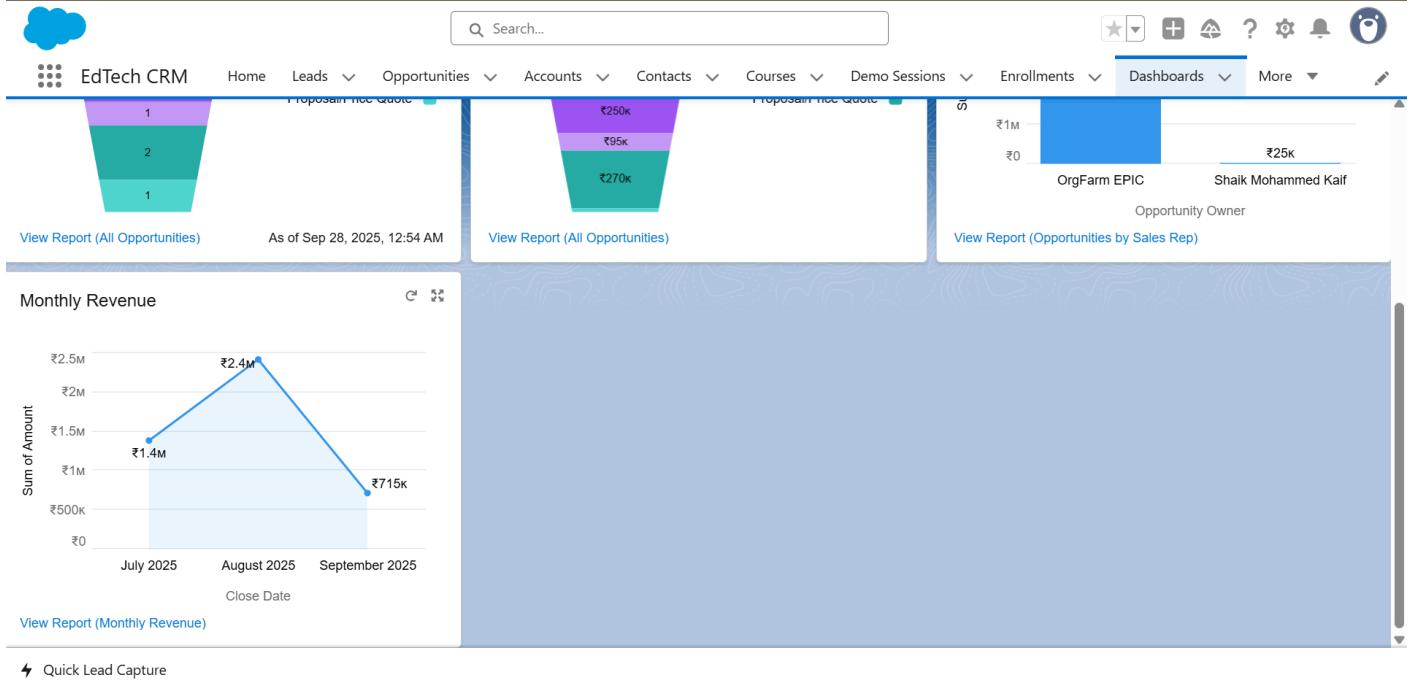
**Report: Opportunities**  
**Monthly Revenue**

Total Records	Total Amount																																																																					
25	₹45,20,000.00																																																																					
<input type="checkbox"/> Close Date ↑ <input type="checkbox"/> Owner Role ↓ <input type="checkbox"/> Opportunity Owner ↓ <input type="checkbox"/> Account Name ↓ <input type="checkbox"/> Opportunity Name ↓ <input type="checkbox"/> Stage ↓ <input type="checkbox"/> Fiscal Period ↓ <input type="checkbox"/> Amount ↑																																																																						
<input type="checkbox"/> July 2025 (9) <table border="1"> <tr><td>-</td><td>OrgFarm EPIC</td><td>Dickenson plc</td><td>Dickenson Mobile Generators</td><td>Qualification</td><td>Q1-2015</td><td>₹15,000.00</td></tr> <tr><td>-</td><td>OrgFarm EPIC</td><td>Edge Communications</td><td>Edge Installation</td><td>Closed Won</td><td>Q1-2015</td><td>₹50,000.00</td></tr> <tr><td>-</td><td>OrgFarm EPIC</td><td>GenePoint</td><td>GenePoint Standby Generator</td><td>Closed Won</td><td>Q1-2015</td><td>₹85,000.00</td></tr> <tr><td>-</td><td>OrgFarm EPIC</td><td>Pyramid Construction Inc.</td><td>Pyramid Emergency Generators</td><td>Prospecting</td><td>Q1-2015</td><td>₹1,00,000.00</td></tr> <tr><td>-</td><td>OrgFarm EPIC</td><td>United Oil &amp; Gas Corp.</td><td>United Oil Office Portable Generators</td><td>Negotiation/Review</td><td>Q1-2015</td><td>₹1,25,000.00</td></tr> <tr><td>-</td><td>OrgFarm EPIC</td><td>Burlington Textiles Corp of America</td><td>Burlington Textiles Weaving Plant Generator</td><td>Closed Won</td><td>Q1-2015</td><td>₹2,35,000.00</td></tr> <tr><td>-</td><td>OrgFarm EPIC</td><td>United Oil &amp; Gas Corp.</td><td>United Oil Installations</td><td>Closed Won</td><td>Q1-2015</td><td>₹2,35,000.00</td></tr> <tr><td>-</td><td>OrgFarm EPIC</td><td>United Oil &amp; Gas Corp.</td><td>United Oil Installations</td><td>Negotiation/Review</td><td>Q1-2015</td><td>₹2,70,000.00</td></tr> <tr><td>-</td><td>OrgFarm EPIC</td><td>United Oil &amp; Gas Corp.</td><td>United Oil Installations</td><td>Closed Won</td><td>Q1-2015</td><td>₹2,70,000.00</td></tr> </table>								-	OrgFarm EPIC	Dickenson plc	Dickenson Mobile Generators	Qualification	Q1-2015	₹15,000.00	-	OrgFarm EPIC	Edge Communications	Edge Installation	Closed Won	Q1-2015	₹50,000.00	-	OrgFarm EPIC	GenePoint	GenePoint Standby Generator	Closed Won	Q1-2015	₹85,000.00	-	OrgFarm EPIC	Pyramid Construction Inc.	Pyramid Emergency Generators	Prospecting	Q1-2015	₹1,00,000.00	-	OrgFarm EPIC	United Oil & Gas Corp.	United Oil Office Portable Generators	Negotiation/Review	Q1-2015	₹1,25,000.00	-	OrgFarm EPIC	Burlington Textiles Corp of America	Burlington Textiles Weaving Plant Generator	Closed Won	Q1-2015	₹2,35,000.00	-	OrgFarm EPIC	United Oil & Gas Corp.	United Oil Installations	Closed Won	Q1-2015	₹2,35,000.00	-	OrgFarm EPIC	United Oil & Gas Corp.	United Oil Installations	Negotiation/Review	Q1-2015	₹2,70,000.00	-	OrgFarm EPIC	United Oil & Gas Corp.	United Oil Installations	Closed Won	Q1-2015	₹2,70,000.00
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⚡ Quick Lead Capture

## 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:
  - o Under "Display As," select a Line Chart .
  - o Y-Axis: Sum of Amount
  - o 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.