

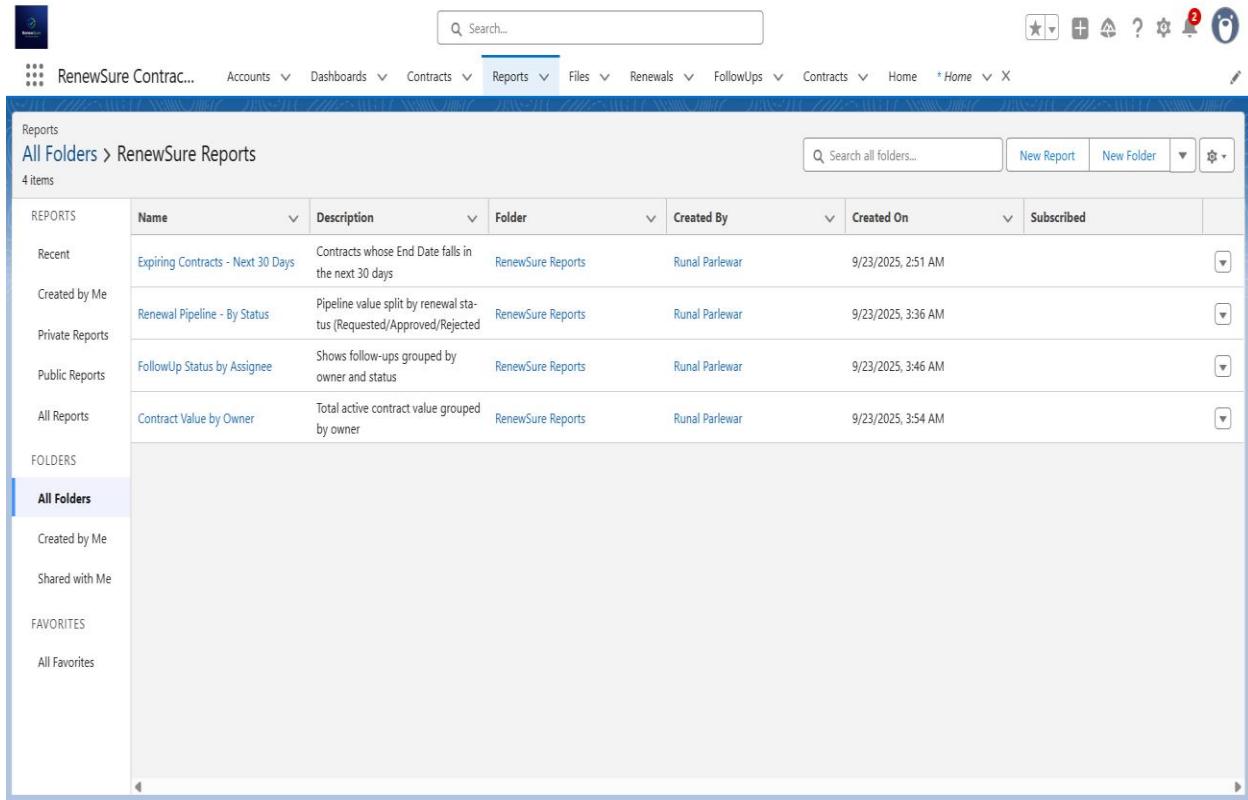
# Project: RenewSure – Smart Contract Expiry & Renewal Tracker

## Phase 9: Reporting, Dashboards & Security Review

### 1. Reports

We created reports to track Contracts, Renewals, and FollowUps for the RenewSure Contract Manager app.

**Steps Followed:** - Setup → Reports → New Report - Selected Report Type: - Contracts and Related Records - Report Formats Used: - Tabular: List of contracts with End Date, Status, Account - Summary: Grouped by Account to see contract counts - Matrix: Contracts by Status vs. Renewal Type - Joined: Contracts & FollowUps in a single view - Added Filters: - Active contracts only - End Date within next 30 days - Added Columns: - Contract Number, Contract Name, Account, Status, Start Date, End Date, Renewal Type, Contract Value



The screenshot shows the RenewSure Contract Manager application's interface. At the top, there is a navigation bar with links for Accounts, Dashboards, Contracts, Reports (which is currently selected), Files, Renewals, FollowUps, Contracts, Home, and a sign-in link. Below the navigation bar is a search bar labeled "Search...". The main content area is titled "Reports" and shows a list of "All Folders > RenewSure Reports". There are four items listed in the report table:

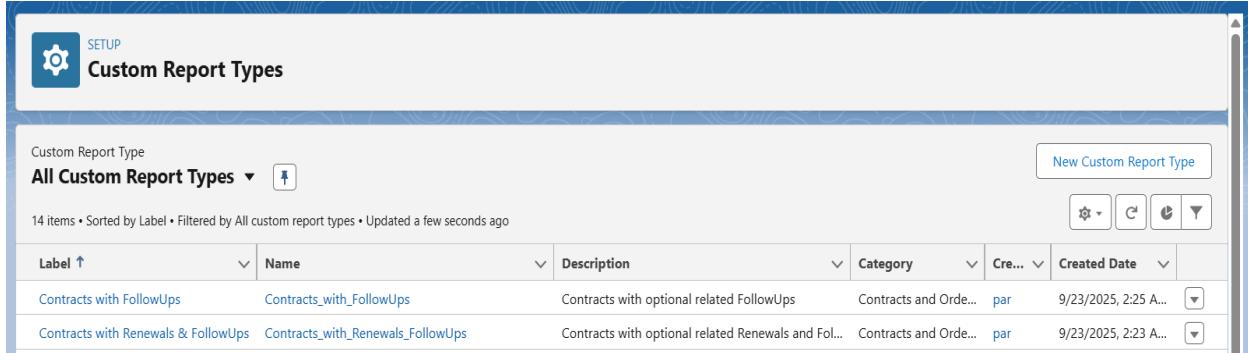
REPORTS	Name	Description	Folder	Created By	Created On	Subscribed
Recent	Expiring Contracts - Next 30 Days	Contracts whose End Date falls in the next 30 days	RenewSure Reports	Runal Parlewar	9/23/2025, 2:51 AM	
Created by Me	Renewal Pipeline - By Status	Pipeline value split by renewal status (Requested/Approved/Rejected)	RenewSure Reports	Runal Parlewar	9/23/2025, 3:36 AM	
Public Reports	FollowUp Status by Assignee	Shows follow-ups grouped by owner and status	RenewSure Reports	Runal Parlewar	9/23/2025, 3:46 AM	

On the left side of the main content area, there is a sidebar with sections for "FOLDERS" (containing "All Folders", "Created by Me", and "Shared with Me"), and "FAVORITES" (containing "All Favorites").

## 2. Report Types

Custom report types were created to combine Contracts, FollowUps, and Renewals.

**Steps Followed:** - Setup → Report Types → New Custom Report Type - Primary Object: Contract\_\_c - Related Object: FollowUp\_\_c (Optional) - Deployment Status: Deployed - Store in Category: Contracts and Orders

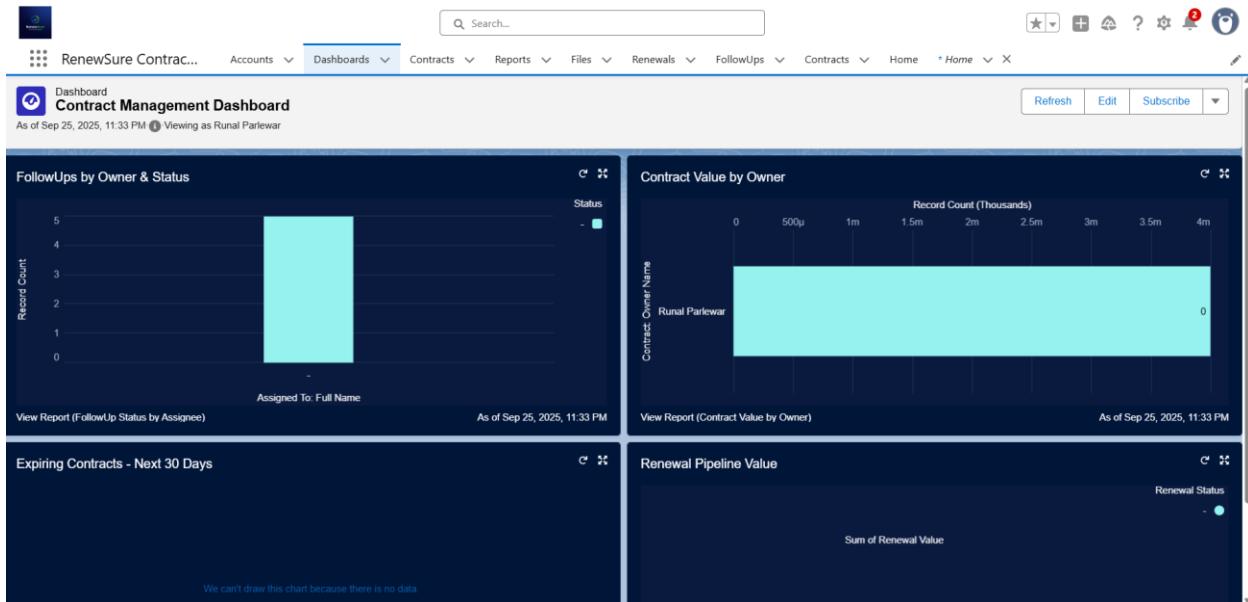


Label ↑	Name	Description	Category	Created Date
Contracts with FollowUps	Contracts_with_FollowUps	Contracts with optional related FollowUps	Contracts and Order...	9/23/2025, 2:25 A...
Contracts with Renewals & FollowUps	Contracts_with_Renewals_FollowUps	Contracts with optional related Renewals and Fol...	Contracts and Order...	9/23/2025, 2:23 A...

## 3. Dashboards

We created dashboards to visualize contract performance and upcoming renewals.

**Steps Followed:** - Setup → Dashboards → New Dashboard - Name: RenewSure Dashboard - Folder: Contract Manager Reports - Components Added: - Bar Chart: Contracts expiring next 30 days - Pie Chart: Contracts by Status - Metric: Total Contract Value - Table: Upcoming FollowUps - Data Sources: Reports created above - Enabled Drill-Down:  (Click chart segment to open underlying report)



## 4. Sharing Settings & Security Review

Ensured proper data access control for all users.

**Steps Followed:** - Setup → Sharing Settings - Contract Manager Profile: Read/Write on Contracts - Legal Officer Profile: Read Only - Field Level Security: - Hide sensitive fields (e.g., Contract Value) from Legal Officers - Session Settings: - Session Timeout: 2 hours - Lock sessions to IP & domain:  - Require HTTPS:  - Login IP Ranges: - Contract Manager: 192.168.0.0/24 - Legal Officer: 192.168.1.0/24 - Audit Trail: - Setup → View Setup Audit Trail - Exported last 6 months of changes

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. It displays several sections for defining sharing rules:

- Work Plan Template Sharing Rules:** No sharing rules specified.
- Work Step Template Sharing Rules:** No sharing rules specified.
- Work Type Sharing Rules:** No sharing rules specified.
- Work Type Group Sharing Rules:** No sharing rules specified.
- Contract Sharing Rules:** A specific rule is shown for the 'Contract' object:

Action	Criteria	Shared With	Access Level
Edit   Del	Contract: Status EQUALS Active	Role: Head of Legal	Read Only
- FollowUp Sharing Rules:** No sharing rules specified.

**Completion Status:** Phase 9 is fully completed with Reports, Dashboards, and Security configured and tested in the RenewSure Salesforce Org.

⚠️ All screenshots to be added in placeholders before uploading to GitHub.