Lead Management & Task Tracking System
Phase 9: Reporting, Dashboards & Security Review

1. Introduction

This phase focuses on creating reports, dashboards, and implementing security measures in Salesforce to monitor and protect the Lead Management & Task Tracking System. Proper reporting helps managers track performance, while security settings ensure data privacy and compliance.

Objectives:

- Generate insightful reports on leads and tasks.
- Create dashboards for real-time monitoring.
- Implement security best practices to protect data.

2. Reports

Salesforce provides multiple report formats: Tabular, Summary, Matrix, and Joined.

Setup Steps:

1. Go to App Launcher → Reports → New Report.
2. Choose object (Lead or Task).
3. Select report type:
    - Tabular: Simple list of records.
    - Summary: Group records by a field (e.g., Status).
    - Matrix: Group by row and column (e.g., Lead Source by Assigned Rep).
    - Joined: Combine multiple report blocks.
4. Apply filters and save the report.

Example Reports:

- Leads by Status (Summary report)
- Tasks due this week (Tabular report)

- Leads by Lead Source and Assigned Rep (Matrix report)

Deliverable: Reports for tracking leads, tasks, and team performance.

3. Report Types

Custom Report Types allow combining objects not supported in standard reports.

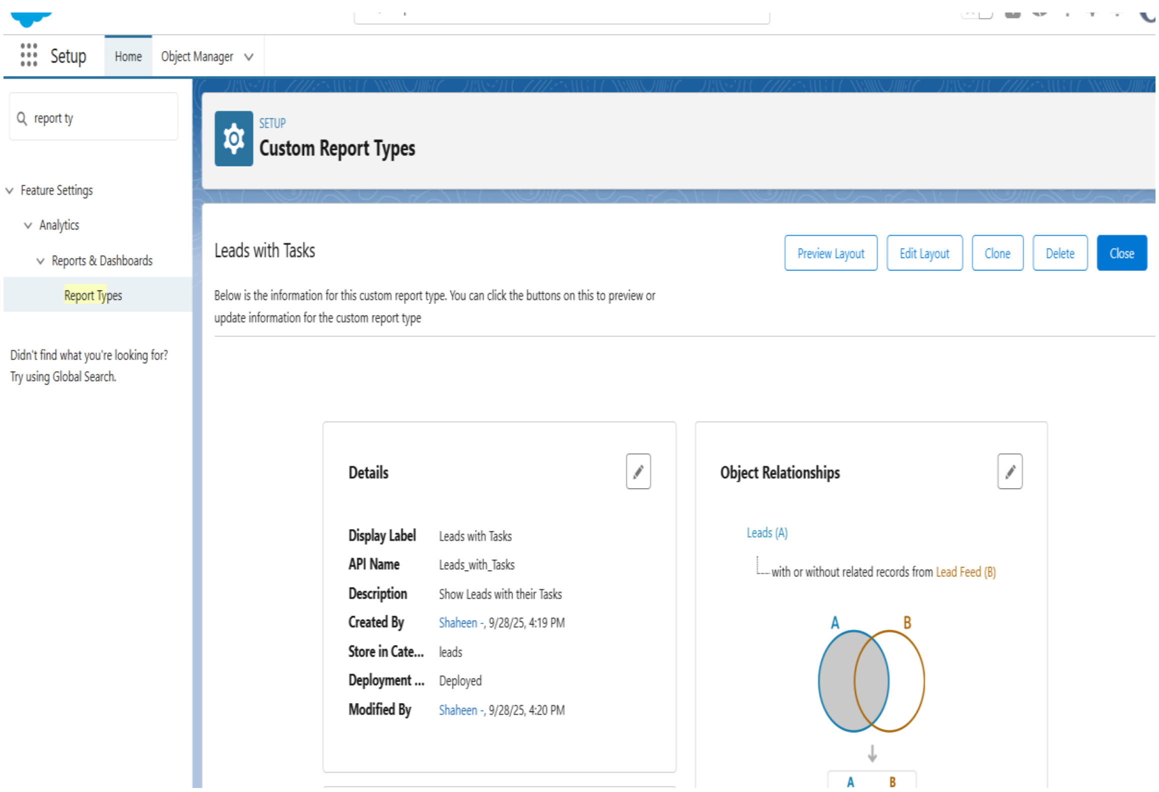
Setup Steps:

1. Go to Setup → Report Types → New Custom Report Type.
2. Primary Object: Lead
3. Related Object: Task
4. Save and deploy for reporting.

Example:

- Custom report type: Lead with Tasks, showing all open tasks per lead.

Deliverable: Custom report types configured for advanced reporting.



4. Dashboards

Dashboards provide a visual representation of reports using charts, tables, and metrics.

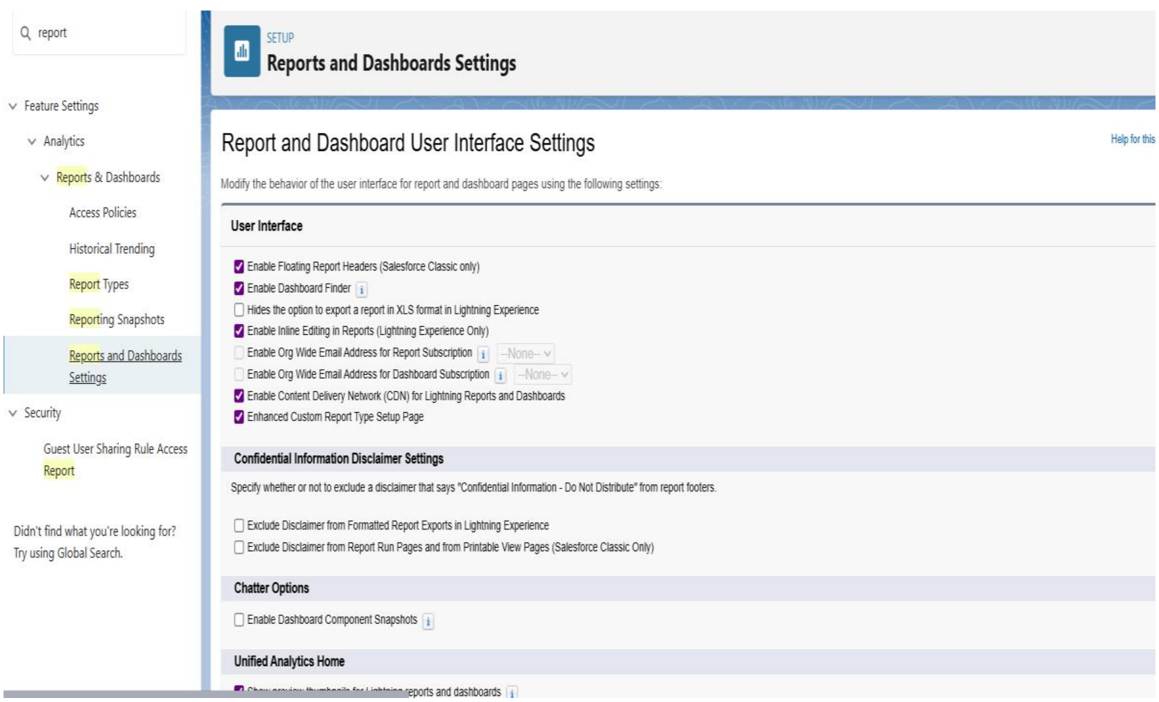
Setup Steps:

1. Go to App Launcher → Dashboards → New Dashboard.
2. Add components: charts, tables, metrics linked to reports.
3. Organize dashboard layout for reps and managers.

Example Dashboard Components:

- Leads by Status (Pie Chart)
- Tasks Due (Bar Chart)
- High-Priority Leads (Table)

Deliverable: Dashboard displaying lead and task performance metrics.



5. Dynamic Dashboards

- Dynamic dashboards allow users to see data based on their role or profile.

Setup Steps:

1. Create or edit a dashboard.
2. Select View Dashboard as: Logged-in User.
3. Assign visibility based on profiles or roles.

Benefits:

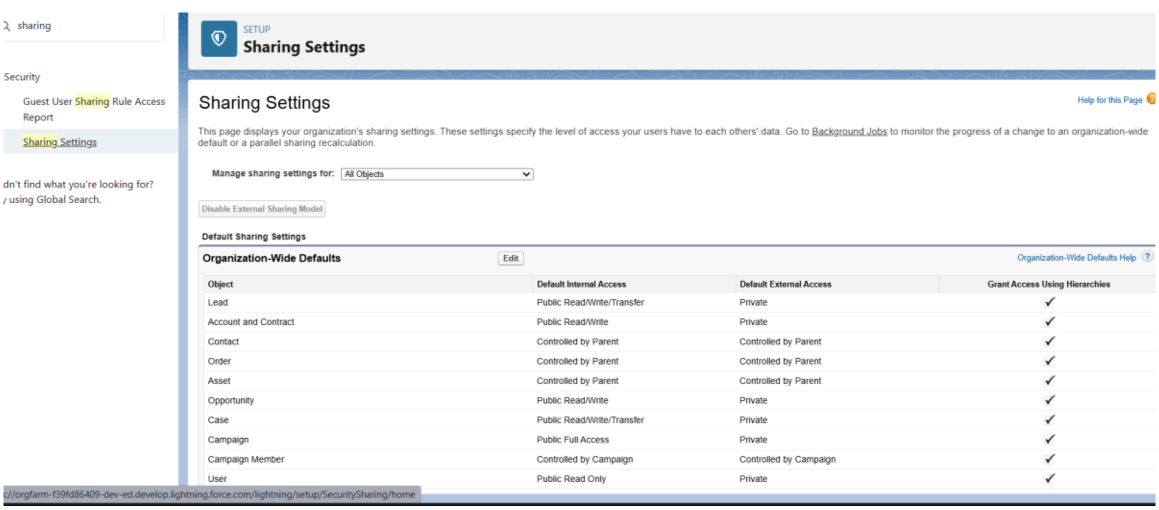
- Managers see team-wide data.
- Sales reps see only their leads and tasks.

Deliverable: Dynamic dashboards configured for roles and profiles.

6. Sharing Settings

Control who can view or edit records. Setup Steps:

1. Go to Setup → Sharing Settings.
2. Set Organization-Wide Defaults (OWD):
    - Lead: Private
    - Task: Controlled by Parent
3. Configure Sharing Rules for exceptions (e.g., share leads with regional managers).



7. Field Level Security (FLS)

Control visibility and edit permissions at the field level.

Setup Steps:

1. Go to Setup → Object Manager → Lead → Fields & Relationships → Set Field-Level Security.
2. Select profiles allowed to view/edit sensitive fields (e.g., Lead Email, Phone).

Deliverable: Field-level security enforced for sensitive lead and task fields.

8. Session Settings

Control user session behavior for security compliance.

Setup Steps:

1. Go to Setup → Security → Session Settings.
2. Configure settings such as:
    - Session timeout (e.g., 30 minutes)
    - Force logout after timeout
    - Enable secure session settings

Deliverable: Session settings configured to prevent unauthorized access.

9. Login IP Ranges

Restrict login access to trusted IP addresses.

Setup Steps:

1. Go to Setup → Profiles → Login IP Ranges.
2. Add trusted IP ranges for office networks or VPN.

Deliverable: IP restrictions applied for secure access.

10. Audit Trail

Track changes to configuration and user activity for compliance.

Setup Steps:

1. Go to Setup → Security → View Setup Audit Trail.
2. Review changes for the last 6 months.

3. Export for documentation or compliance reporting.

Deliverable: Audit trail enabled and monitored for configuration changes.