

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.

The screenshot shows the Salesforce Setup interface for Custom Report Types. The left sidebar contains navigation links: Setup, Home, and Object Manager. The main content area is titled 'Custom Report Types' and displays the configuration for a report type named 'Leads with Tasks'. The configuration includes a 'Details' section with fields like Display Label, API Name, Description, Created By, Store in Cate..., Deployment..., and Modified By. The 'Object Relationships' section shows a Venn diagram with two overlapping circles, A (Leads) and B (Lead Feed), with a label indicating the relationship: '...with or without related records from Lead Feed (B)'.

Setup Home Object Manager

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Feature Settings

Analytics

Reports & Dashboards

Report Types

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Custom Report Types

Leads with Tasks Preview Layout Edit Layout Clone Delete Close

Below is the information for this custom report type. You can click the buttons on this to preview or update information for the custom report type

Details

Display Label Leads with Tasks

API Name Leads_with_Tasks

Description Show Leads with their Tasks

Created By Shaheen -, 9/28/25, 4:19 PM

Store in Cate... leads

Deployment ... Deployed

Modified By Shaheen -, 9/28/25, 4:20 PM

Object Relationships

Leads (A)

...with or without related records from Lead Feed (B)

A B

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.

The screenshot shows the Salesforce Setup interface for 'Reports and Dashboards Settings'. The left sidebar contains a navigation menu with 'Feature Settings' expanded, showing 'Analytics' and 'Reports & Dashboards'. Under 'Reports & Dashboards', 'Reports and Dashboards Settings' is selected. The main content area is titled 'Report and Dashboard User Interface Settings' and includes a 'Help for this' link. Below the title, it states: 'Modify the behavior of the user interface for report and dashboard pages using the following settings:'. The settings are organized into sections: 'User Interface' (with checkboxes for 'Enable Floating Report Headers', 'Enable Dashboard Finder', 'Hide the option to export a report in XLS format', 'Enable Inline Editing in Reports', 'Enable Org Wide Email Address for Report Subscription', 'Enable Org Wide Email Address for Dashboard Subscription', 'Enable Content Delivery Network (CDN)', and 'Enhanced Custom Report Type Setup Page'); 'Confidential Information Disclaimer Settings' (with checkboxes for 'Exclude Disclaimer from Formatted Report Exports' and 'Exclude Disclaimer from Report Run Pages'); 'Chatter Options' (with a checkbox for 'Enable Dashboard Component Snapshots'); and 'Unified Analytics Home' (with a checkbox for 'Show custom thumbnails for Lightning reports and dashboards').

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).

The screenshot displays the Salesforce 'Sharing Settings' page. The left sidebar shows the navigation menu with 'Sharing Settings' selected. The main content area is titled 'Sharing Settings' and includes a description: 'This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.' Below this, there is a dropdown menu for 'Manage sharing settings for: All Objects' and a button for 'Disable External Sharing Model'. The 'Default Sharing Settings' section is expanded, showing a table of 'Organization-Wide Defaults'. The table has four columns: 'Object', 'Default Internal Access', 'Default External Access', and 'Grant Access Using Hierarchies'. The rows list various objects and their corresponding access settings.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓

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.

Setup

Home

Object Manager

view se

Feature Settings

Sales

Contact Intelligence [View Setup](#)

Lead Intelligence [View Setup](#)

Security

[View Setup Audit Trail](#)

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SETUP

View Setup Audit Trail

View Setup Audit Trail

[Help for this Page](#)

The last 20 entries for your organization are listed below. You can [download](#) your organization's setup audit trail for the last six months (Excel .csv file).

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/28/2025, 4:20:25 AM PDT	shaheenshaheen6806212@agentforce.com		Reset standard button override: Tab	Standard Buttons and Links	
9/28/2025, 4:20:16 AM PDT	shaheenshaheen6806212@agentforce.com		Changed Lightning Page: Lead Management Home	Lightning Pages	
9/28/2025, 4:20:10 AM PDT	shaheenshaheen6806212@agentforce.com		Added standard button override: Tab (Lightning Page null)	Standard Buttons and Links	
9/28/2025, 4:19:38 AM PDT	shaheenshaheen6806212@agentforce.com		Created Lightning Page: Lead Management Home	Lightning Pages	
9/28/2025, 4:11:35 AM PDT	shaheenshaheen6806212@agentforce.com		Created custom app Lead Management App	Custom Apps	
9/28/2025, 4:11:35 AM PDT	shaheenshaheen6806212@agentforce.com		Created Lightning Page: Lead Management App UtilityBar	Lightning Pages	
9/28/2025, 4:02:14 AM PDT	shaheenshaheen6806212@agentforce.com		The email approval preference for user Shaheen Shaheen (UserID: [005gl.0000008Sbo1]) changed from 'Only if I am an approver' to 'If I am an approver or delegated approver'	Manage Users	
9/28/2025, 3:38:46 AM PDT	shaheenshaheen6806212@agentforce.com		For the Lead duplicate rule Prevent Duplicate Leads, changed "Active" from "false" to "true"	Duplicate Rule	
9/28/2025, 3:38:43 AM PDT	shaheenshaheen6806212@agentforce.com		For duplicate rule Prevent Duplicate Leads, changed evaluation criteria.	Duplicate Rule	
9/28/2025, 3:38:43 AM PDT	shaheenshaheen6806212@agentforce.com		For duplicate rule Prevent Duplicate Leads, changed matching rules.	Duplicate Rule	
9/28/2025, 3:38:42 AM PDT	shaheenshaheen6806212@agentforce.com		Created new Lead duplicate rule "Prevent Duplicate Leads". Set "Record-Level Security" to "Enforce sharing rules"	Duplicate Rule	