

# Subscription / Personal Services Tracker CRM

---

## Phase 9: Reporting, Dashboards & Security Review

---

### Objective:

To help admins and business users:

- Track subscription metrics through reports and dashboards
  - Ensure secure access through profile permissions, field-level security, and sharing rules
- 

### Key Tasks:

Task	Tool Used	Purpose
Create Reports	Report Builder	Analyze subscriptions, revenue, and payment statuses
Create Dashboards	Dashboard Builder	Visualize trends with charts
Set Profile Permissions	Profile Settings	Limit object/field access for different users
Define Sharing Rules	Sharing Settings	Control record-level visibility
Field-Level Security	Object	Restrict sensitive data visibility per

Task	Tool Used	Purpose
Review	Manager	profile

---

## Steps Performed:

---

### Step 1: Created Custom Reports

#### Report 1: Active Subscriptions by Service Type

- Type: Subscriptions with Service Type
  - Filters: Renewal Status = Active
  - Grouped By: Service Type
  - Saved As: Active Subscriptions by Type
- 

#### Report 2: Monthly Subscription Revenue

- Type: Subscriptions
  - Grouped By: End Date (Monthly)
  - Columns: Subscription Name, Amount
  - Saved As: Monthly Subscription Revenue
- 

#### Report 3: Payment Status Summary

- Type: Payments

- Grouped By: Payment Status
- Columns: Amount Paid, Payment Date
- Saved As: Payment Status Summary

---

## Step 2: Created Dashboard

Navigation:

App Launcher → Dashboards → New Dashboard

Field	Value
-------	-------

Name	Subscription CRM Dashboard
------	----------------------------

Components 3 Charts (Bar, Line, Donut)

### Components Added:

Title	Source Report	Chart Type
Active Subscriptions	Active Subscriptions by Type	Bar Chart
Revenue Per Month	Monthly Subscription Revenue	Line Chart
Payment Breakdown	Payment Status Summary	Donut Chart

Dashboard saved and visible from homepage.

---

## Step 3: Profile Permission Review

Navigation:

Setup → Profiles → Standard User (or custom)

Set access levels for each custom object:

Object	Access Level
--------	--------------

Subscription	Read, Edit
--------------	------------

Payment	Read, Edit
---------	------------

Service Type	Read Only
--------------	-----------

Reviewed Field-Level Security to hide Amount field for standard users if needed.

---

## Step 4: Configured Sharing Rules

Navigation:

Setup → Sharing Settings → Subscription\_\_c

Setting	Value
---------	-------

Default Internal Access	Private
-------------------------	---------

Sharing Rule Name	Share Active Subscriptions
-------------------	----------------------------

Criteria	Renewal_Status = Active
----------	-------------------------

Shared With	Role: Manager
-------------	---------------

Access Level	Read Only
--------------	-----------

Ensures managers can view active subscriptions across teams.

---

## Output Summary:

Feature/Module	Status
----------------	--------

Feature/Module	Status
Reports (3 total)	<input checked="" type="checkbox"/> Done
Dashboard (3 visual components)	<input checked="" type="checkbox"/> Done
Profile & Field-Level Permissions Set	<input checked="" type="checkbox"/> Done
Sharing Rules for Subscription__c	<input checked="" type="checkbox"/> Done