

FitCRM — Phase 9: Reporting, Dashboards & Security Review

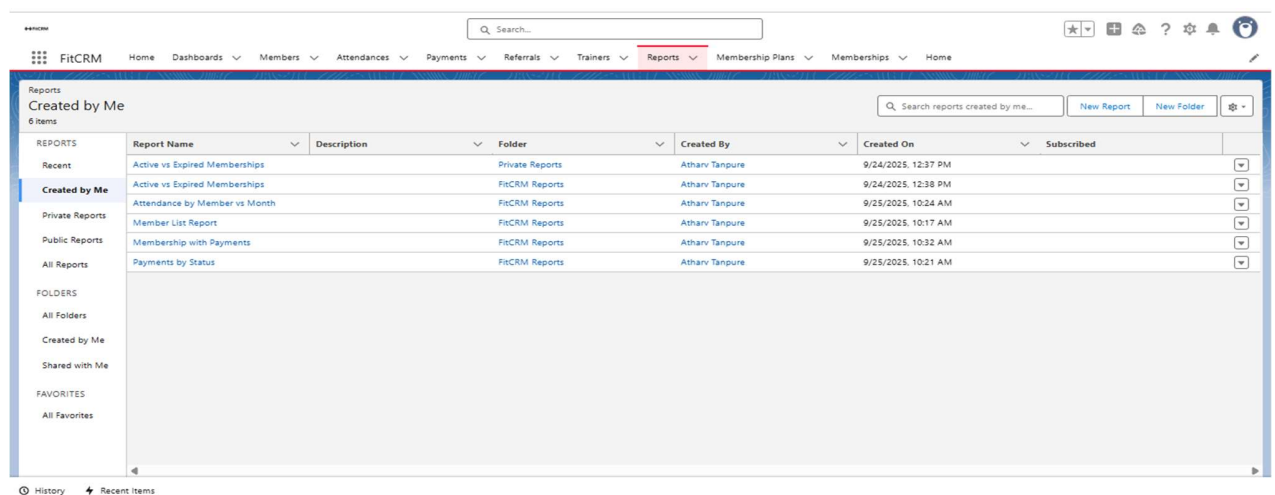
Introduction

Phase 9 focused on building reports and dashboards for analytics, and reviewing security features to ensure safe and controlled access to FitCRM data.

Step 1 — Reports

Custom Reports were created to analyze key FitCRM metrics. The standard Report Builder was used.

- Active vs Expired Memberships — to monitor current memberships.
- Payments Collected — to track revenue.
- Attendance by Member — to check gym usage.
- Referrals Report — to see member referrals.
- Member Report — to see all members.



The screenshot shows the FitCRM Reports interface. The top navigation bar includes a search bar and various menu items. The main content area displays a list of reports created by the user, with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The reports are listed under the 'Created by Me' filter.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Active vs Expired Memberships		Private Reports	Atharv Tanpure	9/24/2025, 12:37 PM	
Created by Me	Active vs Expired Memberships		FitCRM Reports	Atharv Tanpure	9/24/2025, 12:38 PM	
	Attendance by Member vs Month		FitCRM Reports	Atharv Tanpure	9/25/2025, 10:24 AM	
Private Reports	Member List Report		FitCRM Reports	Atharv Tanpure	9/25/2025, 10:17 AM	
Public Reports	Membership with Payments		FitCRM Reports	Atharv Tanpure	9/25/2025, 10:32 AM	
All Reports	Payments by Status		FitCRM Reports	Atharv Tanpure	9/25/2025, 10:21 AM	

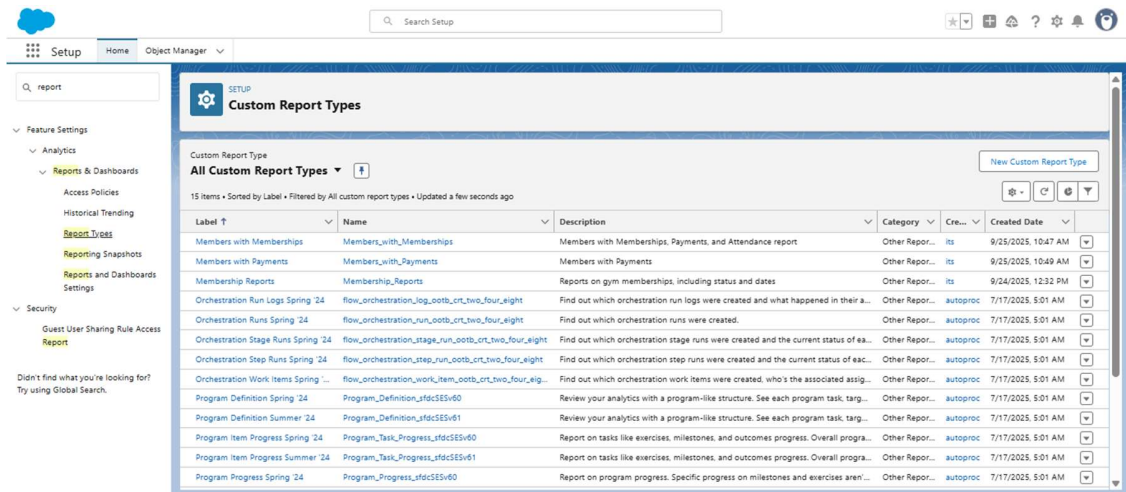
Step 2 — Custom Report Types

Custom Report Types were created to allow reporting across multiple related objects.

Primary Object = Membership__c

Related Objects = Payments__c, Attendance__c

This allowed creating a report showing memberships with linked payments and attendance.

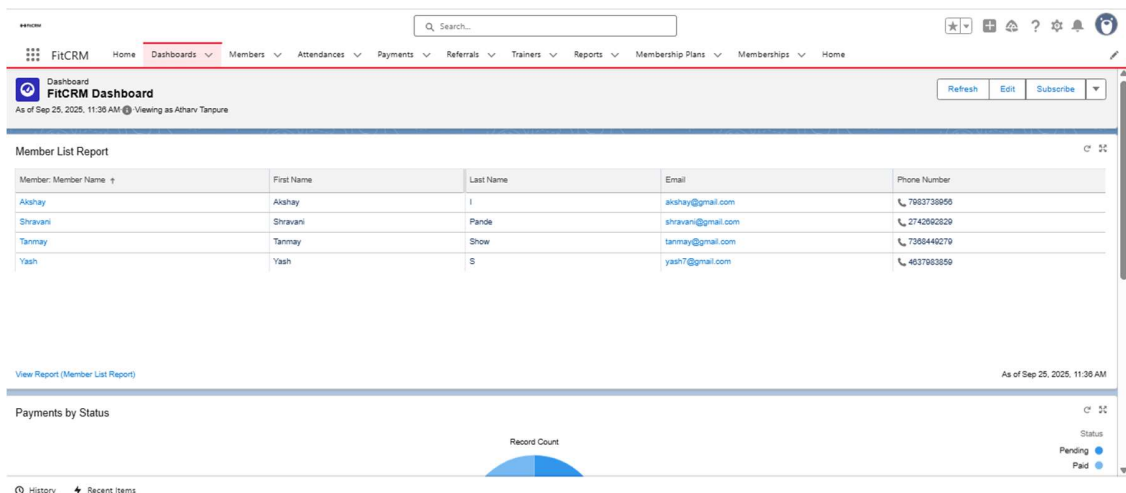


Step 3 — Dashboards

Dashboards were built to visualize key metrics for Admin and Staff. Each dashboard used components from the above reports.

• FitCRM Dashboard (Main)

- Member List Report
- Payment By Status
- Attendance by Member vs Months



Conclusion

Phase 9 completed the FitCRM project by enabling reporting and visualization of data through Reports and Dashboards. Additionally, a thorough review of security ensured that data access remained controlled and compliant with best practices.