**Phase 9: Reporting, Dashboards & Security Review**

**Goal**

Monitor sales performance, track lead conversions, and ensure secure access to data.

**1. Reports**

* **Lead Conversion Report:** Shows how many leads were converted to opportunities.
* **Leads by Status:** Tracks the number of leads in each stage (New, Contacted, Qualified, Converted).
* **Lead Source Report:** Analyses which marketing channels generate the most leads.

**2. Report Types**

* **Custom Report Types:**
  + Lead + Lead Interaction → to track follow-ups.
  + Lead + Opportunity → to analyse conversion efficiency.
* A computer screen shot of a email

  AI-generated content may be incorrect.

**3. Dashboards**

* **Sales Agent Dashboard:** Shows assigned leads, upcoming follow-ups, and recent activities.
* **Manager Dashboard:** Displays lead conversion rate, high-value leads, and agent performance.
* **Dynamic Dashboards:** Each agent sees only their own leads and performance metrics.
* A screenshot of a computer

  AI-generated content may be incorrect.

**4. Security & Access**

* **Sharing Settings:**
  + Leads are private → only the owner and manager can view/edit.
  + Opportunities or Accounts visible based on role hierarchy.
* **Field Level Security:**
  + Hide sensitive fields (e.g., personal email or phone) from agents if needed.
* **Session Settings:**
  + Auto-logout after 30 minutes of inactivity.
* **Login IP Ranges:**
  + Restrict login access for agents to company IP addresses.
* **Audit Trail:**
  + Track who created, updated, or deleted lead records for accountability.