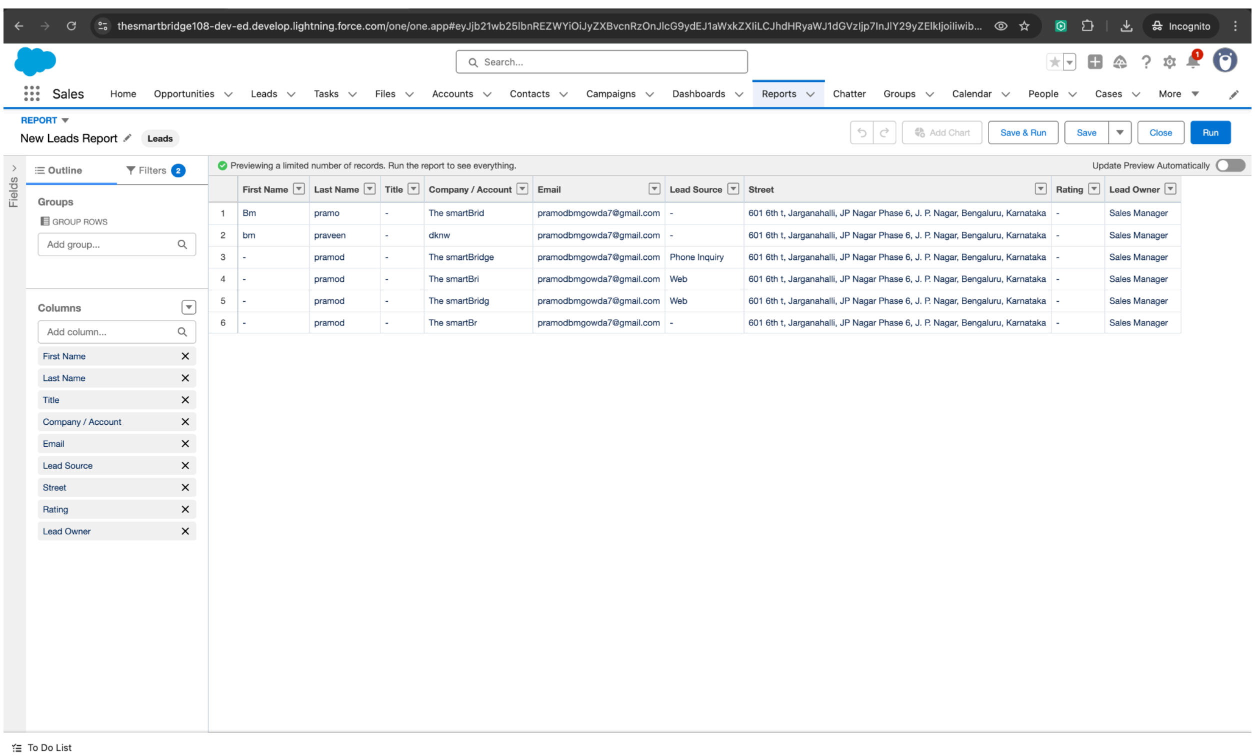
Phase 9 Report

Reporting, Dashboards & Security Review

Reports (Tabular, Summary, Matrix, Joined)

To empower sales and management with flexible data analysis, we have configured a variety of report formats. Each format serves a unique purpose:

- **Tabular Report: Lead List:** A simple tabular report was created to provide a complete list of all leads, including their status, source, and creation date. This is used for a high-level overview and data export.



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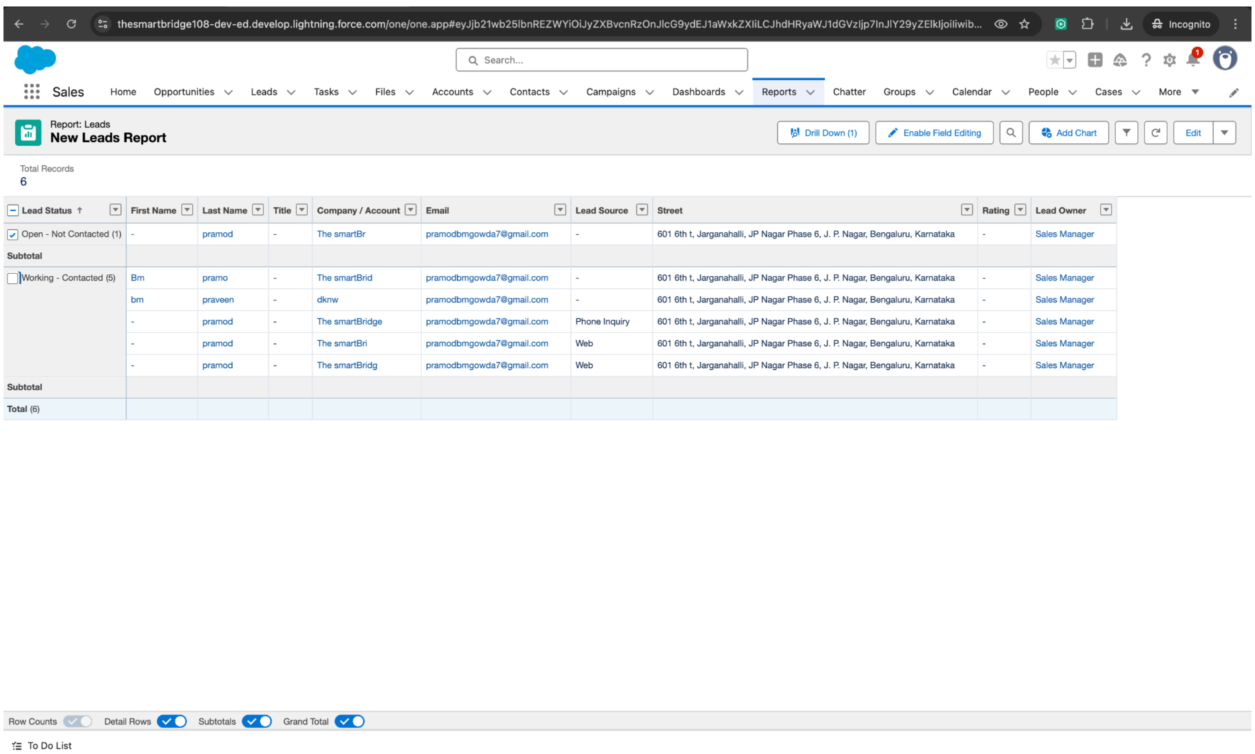
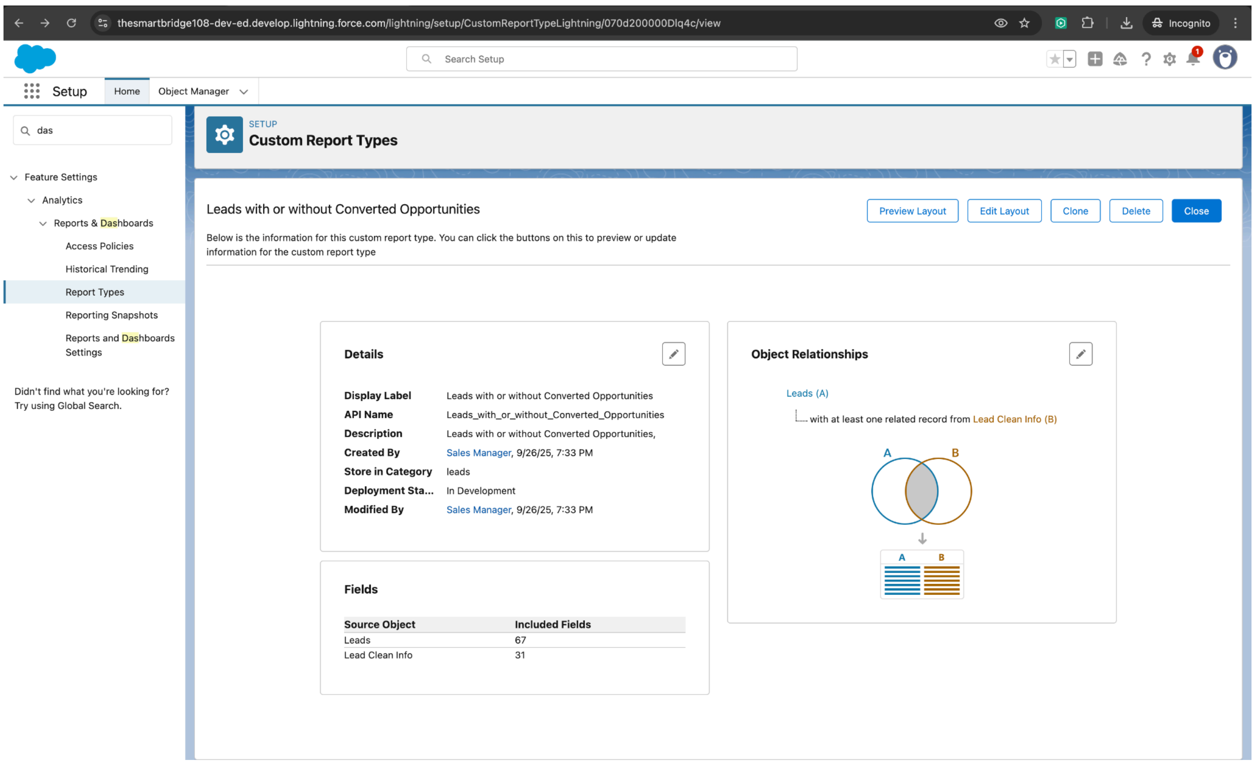
- **Summary Report: Leads by Status:** We developed a summary report grouped by Lead Status. This report provides a quick view of the sales funnel, allowing managers to see the number of leads in each stage (e.g., "New," "Working," "Nurturing"). It also includes a sum of the Expected Revenue field.



Report Types

A custom report type, was created specifically for this project. This enables us to report on the complete lead lifecycle, from creation to conversion, providing the data necessary for the joined report mentioned above. This custom report type ensures that all fields from both the Lead and Opportunity objects are available for reporting.

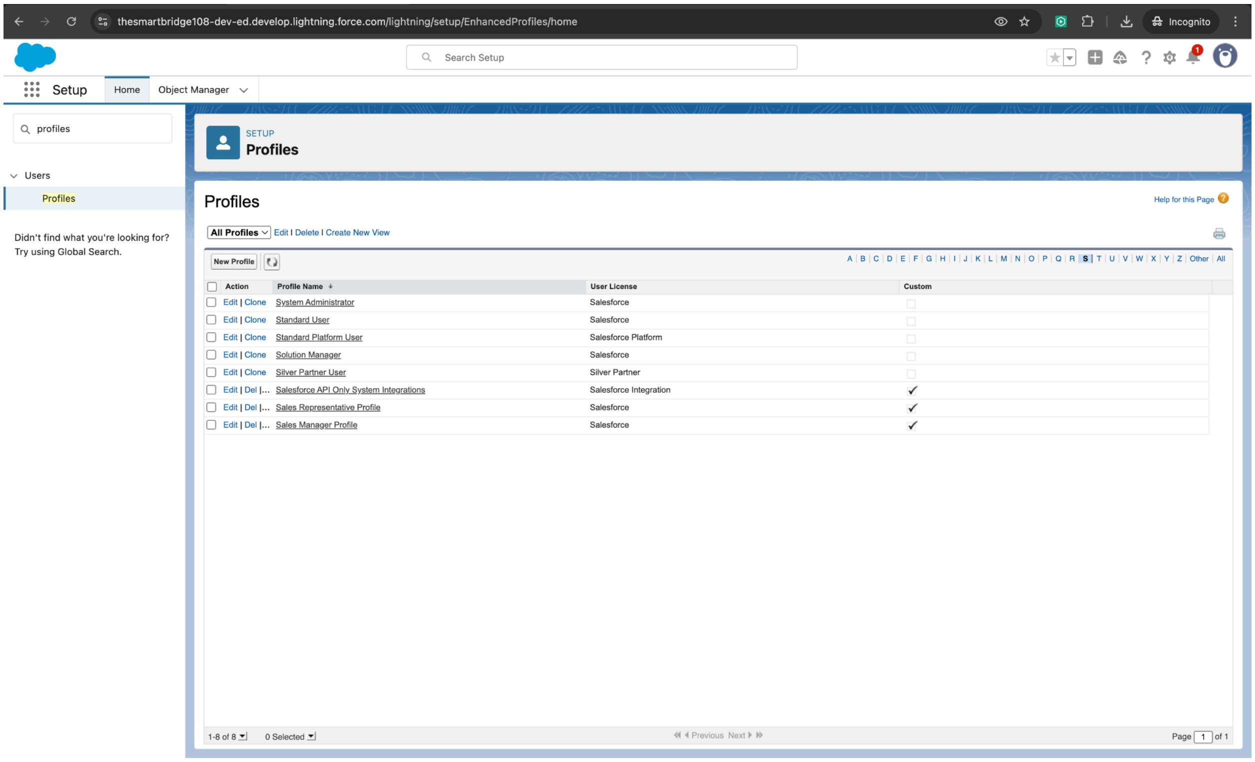


Dashboards

- Salesforce dashboard is a visual representation of your key business data and metrics gathered from one or more reports. It displays real-time summarized information in charts, graphs, tables, and gauges, providing a consolidated snapshot that helps users quickly understand performance and trends.
- Dashboards are customizable and interactive, allowing users to drill down into details. They support multiple component types and can be tailored to different audiences, roles, or departments.
- Dashboards are essential for your Lead Management and Sales Tracking project to visually track sales pipeline, lead conversion, revenue metrics, and other key performance indicators for quick decision-making.

Profiles

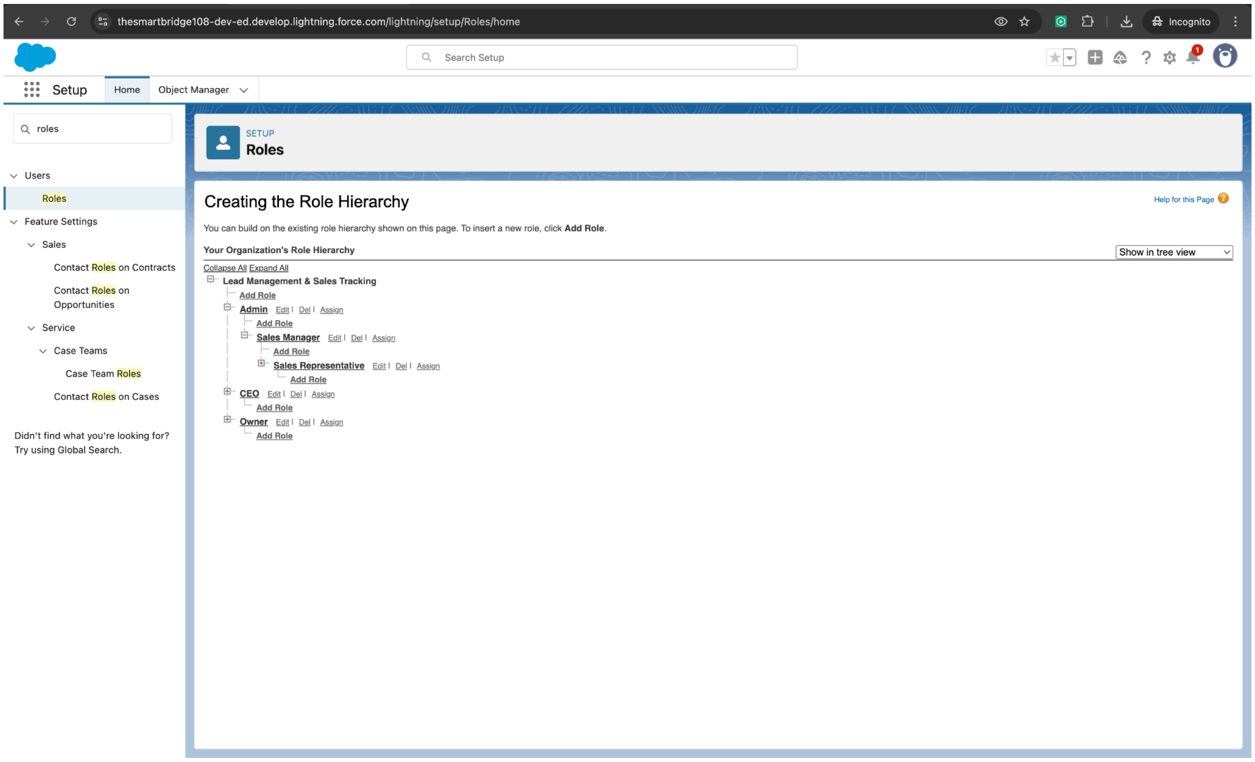
We established two custom profiles: **"Sales Rep"** and **"Sales Manager."** Each profile defines a baseline level of access to objects and permissions. For example, the **"Sales Rep"** profile has Read, Create, and Edit permissions on Leads and Read Only permission on Opportunities, ensuring they can work their leads but not alter deal data they do not own.



Roles

A role hierarchy was defined to model the sales organization structure:

- **VP of Sales (Top)**
- **Sales Director**
- **Sales Manager**
- Sales Rep (Bottom)
  This hierarchy is crucial for the security model, as a user in a higher role automatically gains Read Only access to all records owned by users below them in the hierarchy. This allows managers to see their team's data without manual sharing.

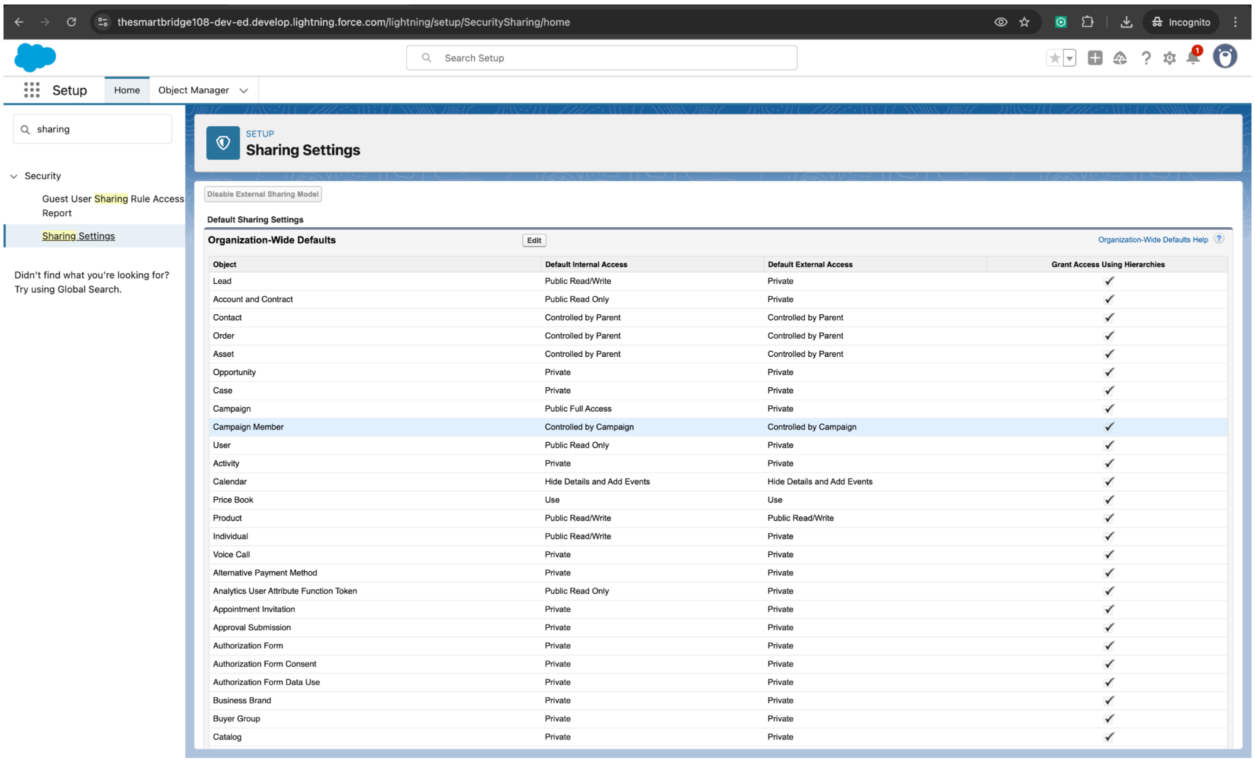


Permission Sets

Permission Sets in Salesforce are collections of settings and permissions that grant users access to various tools, features, and records beyond what their assigned profile provides. Unlike profiles, which are assigned one per user and set baseline permissions, users can have multiple permission sets assigned to them. This flexibility allows administrators to grant additional, often temporary or task-specific, permissions without changing the user's profile.

Organization-Wide Defaults (OWD)

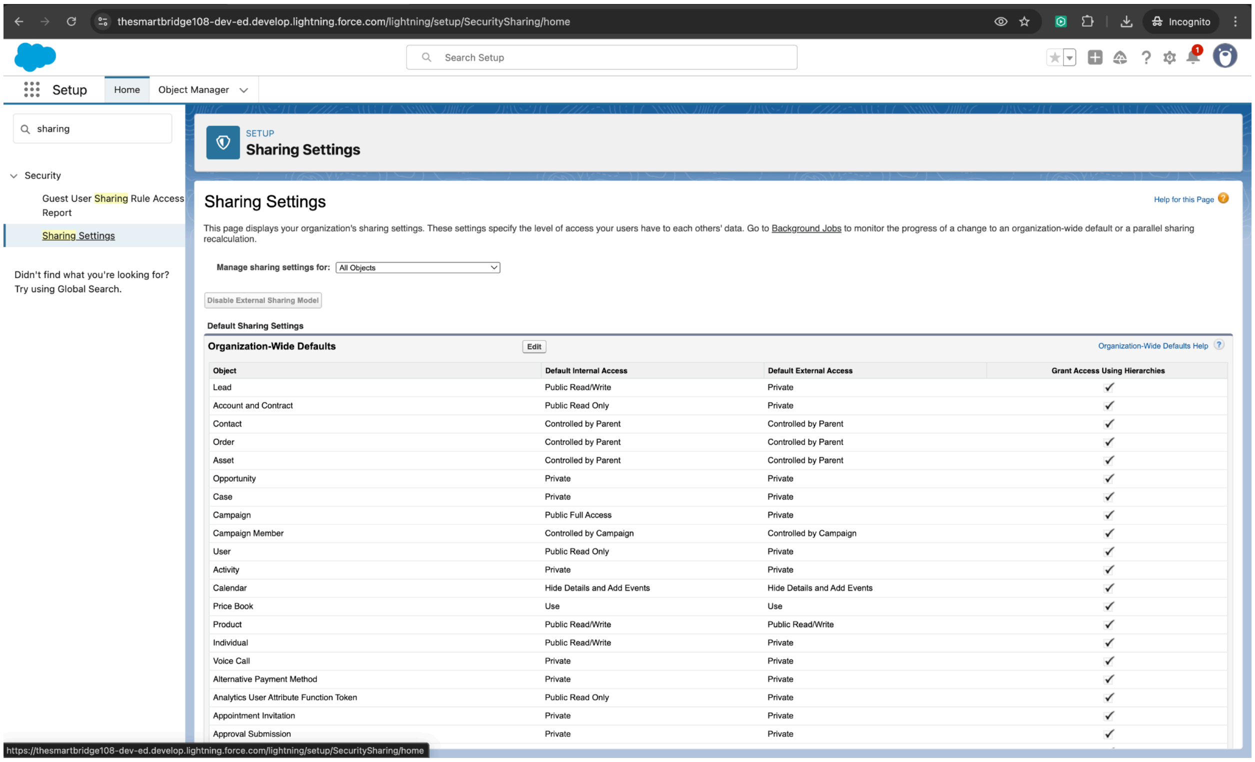
The foundational sharing model for this project is built on OWD. We set the OWD for both Leads and Opportunities to **Private**. This means that by default, a user can only see and edit the records they own. This ensures a secure and private working environment for each sales rep.



Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write	Private	✓
Account and Contract	Public Read Only	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Private	Private	✓
Case	Private	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓
Individual	Public Read/Write	Private	✓
Voice Call	Private	Private	✓
Alternative Payment Method	Private	Private	✓
Analytics User Attribute Function Token	Public Read Only	Private	✓
Appointment Invitation	Private	Private	✓
Approval Submission	Private	Private	✓
Authorization Form	Private	Private	✓
Authorization Form Consent	Private	Private	✓
Authorization Form Data Use	Private	Private	✓
Business Brand	Private	Private	✓
Buyer Group	Private	Private	✓
Catalog	Private	Private	✓

Sharing Settings

The overall sharing model is a combination of the above configurations. The Private OWD establishes the baseline, while the Role Hierarchy and Sharing Rules selectively open up access. This layered approach ensures that the project's data is secure by default, with controlled exceptions for business needs.



Field-Level Security

Sensitive fields were secured using Field-Level Security. For instance, the Expected Revenue field on the Opportunity object is set to Hidden for the **"Sales Rep"** profile, preventing reps from seeing sensitive financial projections. It is visible only to the "Sales Manager" and "Sales Director" profiles.

Session Settings

Session Settings in Salesforce are security configurations that control how user sessions behave when users are logged into the system. These settings include policies such as:

Login IP Ranges

Login IP Ranges in Salesforce are security settings configured at the profile level to restrict user logins to specific IP address ranges. This helps protect your Salesforce org against unauthorized access from outside the company's trusted network locations.

Audit Trail

- Audit Trail is a security and compliance feature that records a history of administrative actions and system configuration changes within your Salesforce org.
- It provides a time-stamped log of who made changes, when they were made, and what was changed, such as user management updates, permission changes, workflow modifications, and configuration adjustments. This helps organizations: