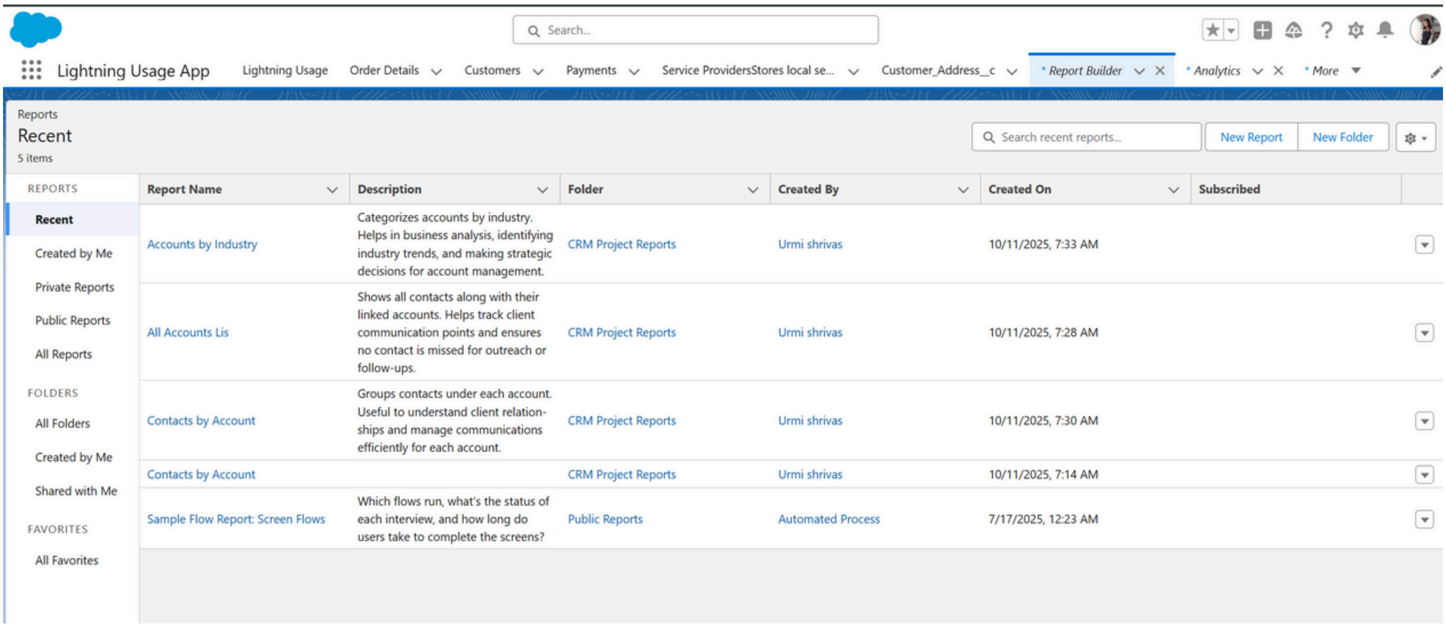
Phase 9: Reporting, Dashboards & Security review

1. Reports(Tabular, Summary, Matrix,Joined)

- **Folder:** All reports saved in **CRM Project Reports** folder.
- **Filters / Grouping:** Adjust as per project requirements.
- **Purpose:** Each report is aligned to project needs like tracking clients, contacts, industry distribution, and owner responsibilities.

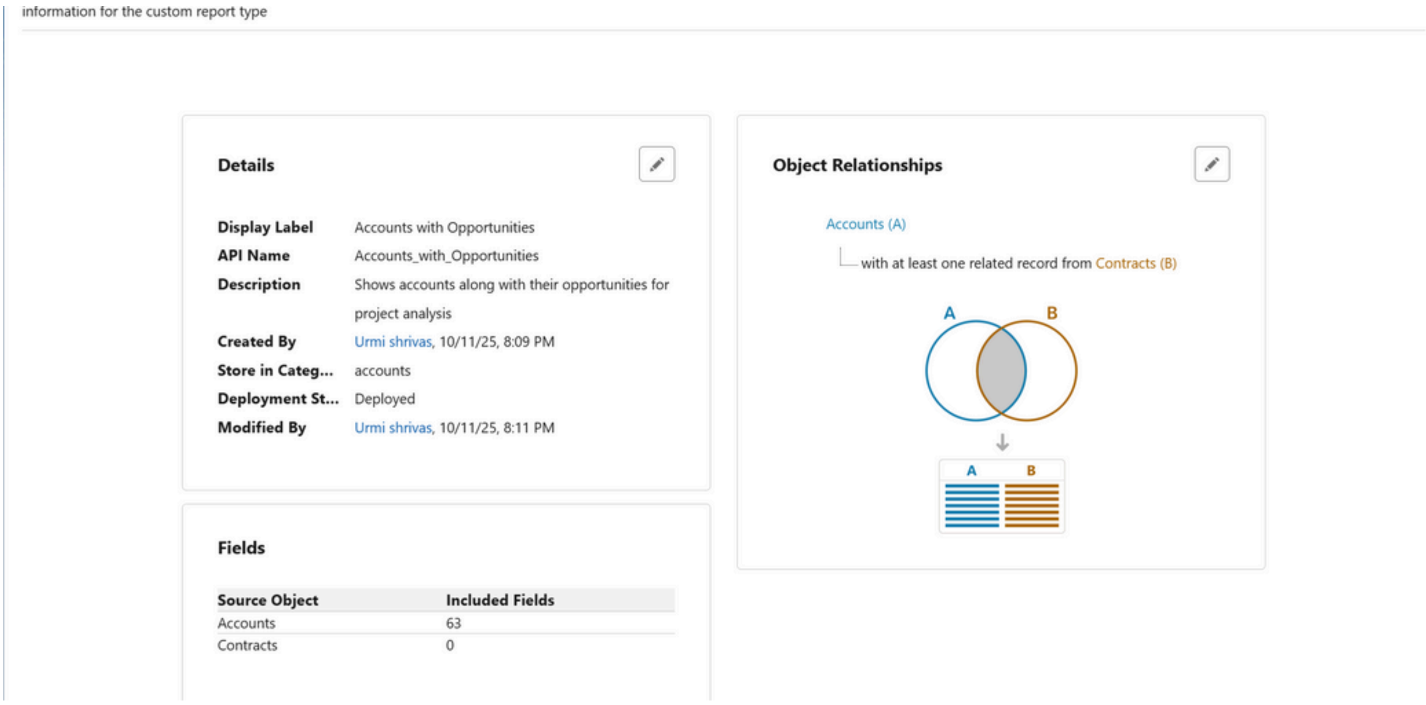


2. Report types

- A Report Type in Salesforce defines the **set of records and fields** available for a report. It determines **which objects and related data** can be included in a report.

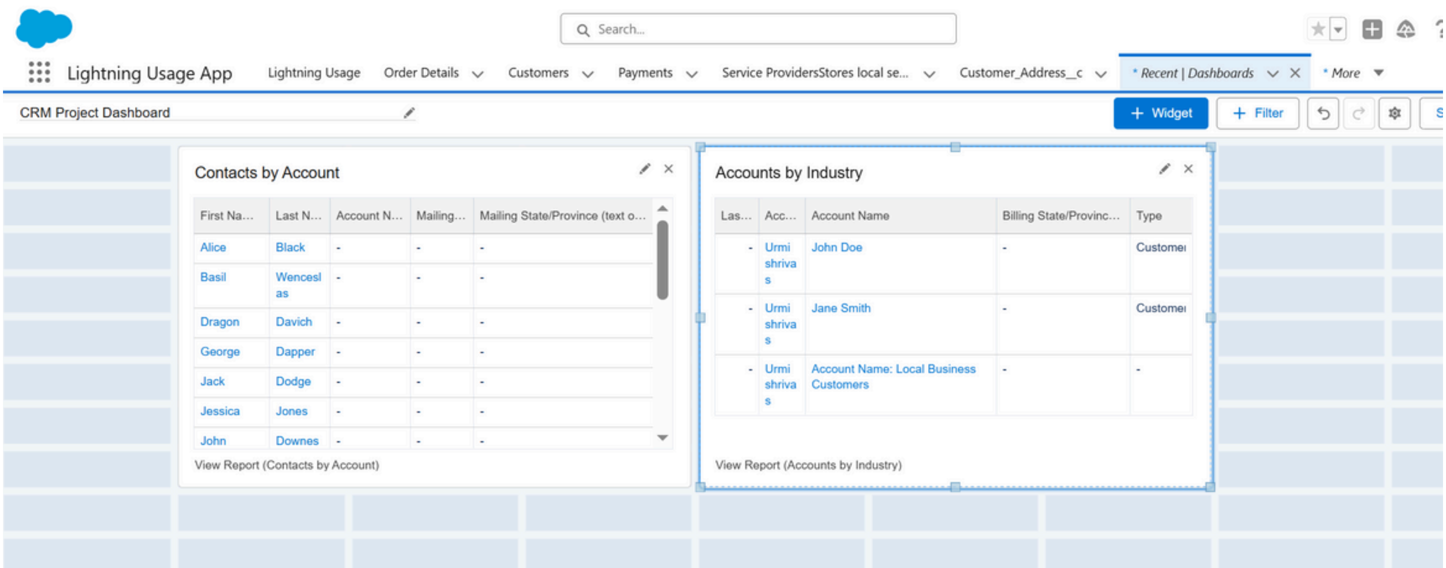
1. **Purpose in Project:**

- In this project, Report Types are used to ensure that the **correct data from Accounts and Contacts** is available for reporting. They allow grouping, filtering, and displaying information as per project needs.



3. Dashboards

- The dashboard provides a **visual overview of the CRM project data**, combining key reports to help track and analyze client information.
- **Contacts by Account widget** shows the number of contacts under each account, helping manage client relationships efficiently.
- **Accounts by Industry widget** displays the distribution of accounts by industry, aiding in business analysis and strategy planning.
  Overall, it allows **quick monitoring of accounts and contacts**, supports team workload tracking, and enhances decision-making within the project.

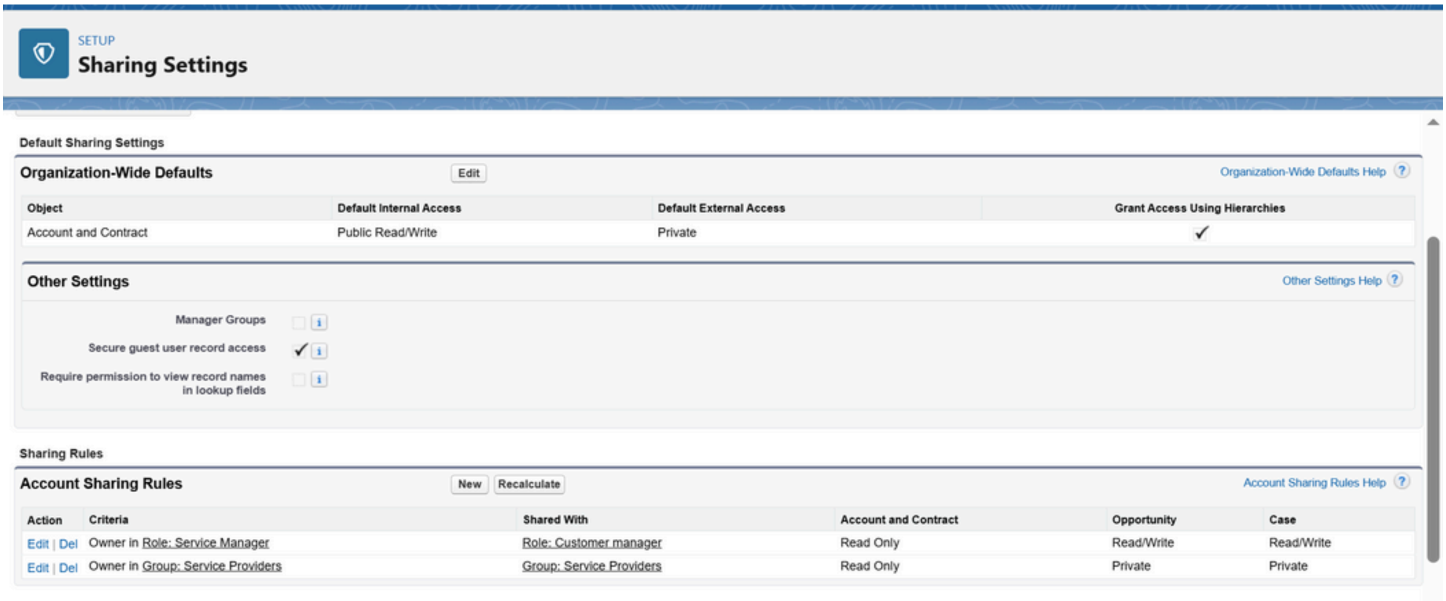


4. Dynamic Dashboards

- Dynamic Dashboards allow users to view dashboard data **based on the logged-in user**.
- In this project, they help **team members see their own accounts and contacts**.
- This ensures **personalized data visibility** and supports efficient decision-makin

5. Sharing Setting

- **Service Provider:** Assigned to handle day-to-day service tasks and update records.
- **Service Manager:** Oversees service operations, monitors progress, and ensures quality.
  These roles **help maintain proper workflow, role-based data visibility, and accountability** within the CRM project.



6. Field level Security

- Controls visibility and edit access to specific fields for different user profiles.
- Used in the project to restrict sensitive fields for junior roles.
- Ensures data privacy while allowing access to necessary information.

7. · Session Settings

- Configure **session timeout and security policies** in Salesforce.
- Implemented to **auto-logout inactive users** in the project.
- Enhances **CRM project data security** and prevents unauthorized access .

8. Login IP Ranges

- Restrict Salesforce login to **specific IP addresses**.

- Set for service managers and providers to **allow access only from company network**.
- Provides **controlled access** to CRM project data.

9. Audit Trail

- Tracks **changes made to setup and configuration** in Salesforce.
- Used to **monitor modifications in fields, sharing rules, and security settings**.
- Helps maintain **accountability and troubleshooting** in the project.