Phase 9: Reporting, Dashboards & Security Review

Goal: Monitor project performance with reports & dashboards, and secure system access.

1. Reports

Active Members Report

- Report Type: Members (Standard)
- Columns: Name, Email, Membership Type, Status
- Filter: Status = Active
- Purpose: Show all active members for monitoring.

Expiring Subscriptions Report

- **Report Type:** Subscriptions with Member (Standard)
- **Columns:** Member Name, Plan, Start Date, End Date, Status
- **Filter:** End Date = NEXT 30 DAYS
- **Purpose:** Highlight subscriptions ending soon for renewal follow-up.

Revenue by Month Report

- **Report Type:** Invoices with Member (Standard)
- **Columns:** Member Name, Amount, Invoice Date
- **Group By:** Invoice Date → Calendar
- Month **Summary:** SUM(Amount__c)
- **Purpose:** Track monthly revenue performance.

2. Dashboard

Dashboard Name: Membership Overview Dashboard

Components:

1. **Metric:** Total Active Members → Active Members Report
2. **Table:** Expiring Subscriptions → Subscriptions with Member Report
3. **Bar Chart:** Revenue by Month → Invoices with Member Report
4. *(Optional)* Pie Chart: Members by Plan → Active Members Report **Layout Suggestion:**

- Top row: Metric
- Middle row: Bar Chart
- Bottom row: Table

Dashboards
Recent

item

DASHBOARDS	Dashboard Name	∨	Description	∨	Folder	∨	Created By	∨	Created On	∨
Recent	Membership Overview Dashboard				sales report		Srinadh Veeravalli		9/26/2025, 1:55 AM	

3. Security Review

Sharing Settings

- Members: Public Read Only
- Subscriptions: Private (owner & managers
- only) Invoices: Private

Field Level Security

- Hide sensitive fields like Payment_Details__c or Customer_ID_Proof__c from
- Agents Setup → Object Manager → Field → Set FLS

Session Settings

- Timeout after 30 minutes (auto log out inactive users)

Login IP Ranges

- Restrict Agents to office IP range
- Setup → Profiles → Agent Profile → Login IP Ranges

Audit Trail

- Track which admin/user made changes
- Setup → View Setup Audit Trail

Conclusion: Phase 9 enables managers to **track members, subscriptions, and revenue** while **ensuring sensitive data is secure**. Dynamic dashboards + IP restrictions + FLS enhance professionalism and data integrity.