

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.

The screenshot displays the 'Membership Mana...' application interface. The top navigation bar includes 'Members', 'Subscriptions', 'Invoices', 'Reports' (highlighted), and 'Dashboards'. Below the navigation bar, the 'REPORT' section is active, showing the 'Active Members Report' with a 'Members' tab. A sidebar on the left contains an 'Outline' and 'Filters' section. The 'Filters' section includes an 'Add filter...' button, a 'Show Me My members' button, and two filter criteria: 'Member: Created Date All Time' and 'MemberShip Status equals Active'. The main table area shows a preview of three active members. A message at the top of the table states: 'Previewing a limited number of records. Run the report to see everything.'

	Member: Member Name	Email	MemberShip Status
1	ganesh	srinadhveeravalli123@gmail.com	Active
2	srinadh	1@gmail.com	Active
3	rajesh	-	Active

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.

The screenshot shows the 'Membership Manager' application. The top navigation bar includes 'Members', 'Subscriptions', 'Invoices', 'Reports', and 'Dashboards'. The 'Reports' section is active, displaying the 'Expiring Subscriptions Report' under the 'Subscriptions with Member' category. The report interface includes a 'Fields' sidebar with 'Outline', 'Filters' (2), and 'Columns' sections. The 'Columns' section lists 'Member: Member Name', 'Plan', and 'Start Date'. The main table displays three records with columns for Member Name, Plan, Start Date, End Date, and Status. A message at the top of the table states: 'Previewing a limited number of records. Run the report to see everything.'

	Member: Member Name	Plan	Start Date	End Date	Status
1	ganesh	Basic	9/19/2025	9/30/2025	Active
2	srinadh	Basic	9/25/2025	10/25/2025	-
3	rajesh	Basic	9/25/2025	10/25/2025	Active

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

 Membership Mana...



Members ▾ Subscriptions ▾ Invoices ▾ Rep

 Dashboard

Membership Overview Dashboard

As of Oct 6, 2025, 5:43 AM ·  Viewing as Srinadh Veeravalli

Active Members Report

Member: Member Name..↑	Email	MemberShip Sta...
Akash	2@gmail.com	Active
ganesh	srinadhveeravalli123@gmail.con	Active
Lakshman	-	Active
Manoj	-	Active
Rahul	-	Active
rajesh	-	Active
Ram	-	Active

[View Report \(Active Members Report\)](#)

As of Oct 6, 2025, 5:43 AM

Membership Mana... Members ▾ Subscriptions ▾ Invoices ▾ Reports ▾ Dashboards ▾						
Dashboards						
Recent						
<div> <div>Q</div> <div>Search recent dashboards...</div> </div>						
<div> <div>Item</div> </div>						
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.