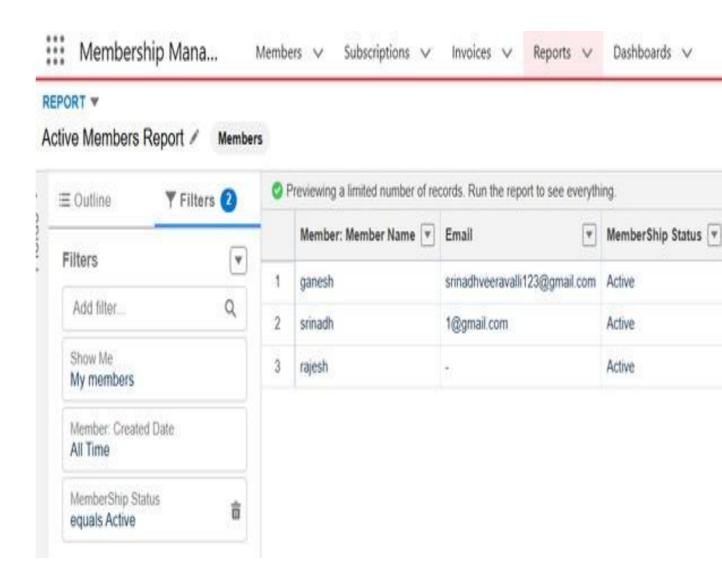
Phase 9: Reporting, Dashboards & Security Review

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.



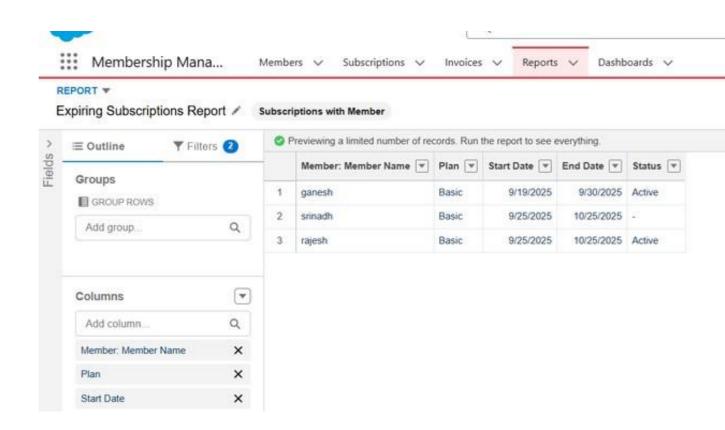
Expiring Subscriptions Report

• **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

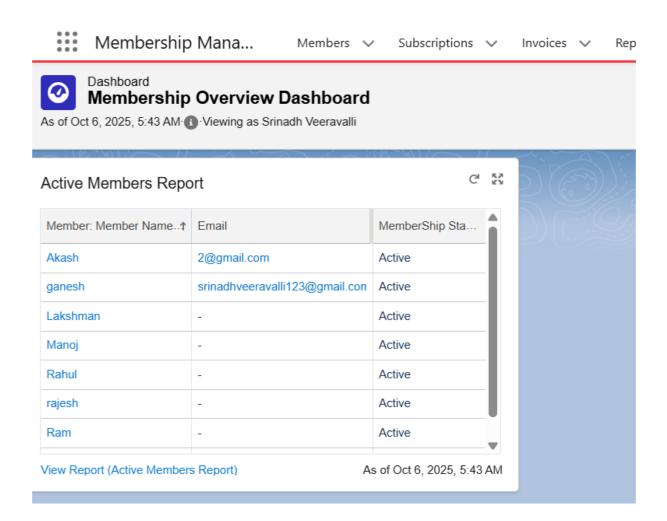
2. **Table:** Expiring Subscriptions → Subscriptions with Member Report

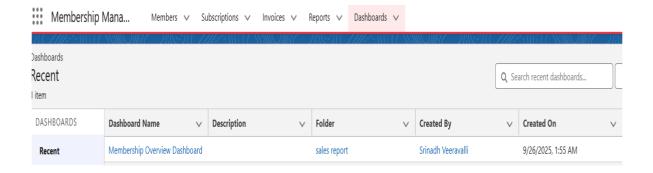
3. **Bar Chart:** Revenue by Month → Invoices with Member Report

4. (Optional) Pie Chart: Members by Plan → Active Members Report Layout Suggestion:

• Top row: Metric

Middle row: Bar ChartBottom row: Table





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.