

## 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

### 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.

Membership Mana...

Members ▾

Subscriptions ▾

Invoices ▾

Reports ▾

Dashboards ▾

REPORT ▾

Active Members Report ✎

Members

Outline

Filters 2

Filters

Add filter...

Show Me My members

Member: Created Date All Time

MemberShip Status equals Active

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

REPORT

Expiring Subscriptions Report

Subscriptions with Member

Fields

Outline

Filters 2

Groups

GROUP ROWS

Add group...

Columns

Add column...

Member: Member Name

Plan

Start Date

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