

## Phase 9: Reporting, Dashboards & Security Review

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

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### 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.
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#### 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.
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#### 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.
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### 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
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### **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
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### **✓ 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

Membership Mana...

Members

Subscriptions

Invoices

Reports

Dashboards

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