

PHASE 9 – Reporting, Dashboards & Security Review

Transforming Retail Data Into Business Intelligence & Ensuring System-Wide Security

1. Introduction

Phase 8B focuses on two critical aspects of the HandsMenThreads Salesforce implementation:

1. **Reporting & Dashboards** – empowering management with real-time insights.
2. **Security Review** – ensuring controlled access to sensitive customer, order, and inventory information.

In a retail environment where trends shift rapidly and business decisions require precision, insights derived from CRM data are extremely valuable. Executives must identify best-selling products, monitor customer loyalty growth, track orders, and foresee inventory shortages. Similarly, strong security frameworks ensure only authorized personnel access confidential business data, protecting the brand's credibility and customer trust.

This phase demonstrates how Salesforce became a strategic decision-making and governance tool within the organization, not just an operational system.

2. Importance of Reporting for HandsMenThreads

HandsMenThreads operates in a competitive market where product performance, seasonal demand, customer retention, and operational efficiency directly affect revenue. Manual reporting through spreadsheets previously resulted in:

- Delayed insights
- Misaligned forecasts
- Human error
- Difficulty tracking trends
- No visibility into customer behavior patterns

With Salesforce Reports & Dashboards, analytics became real-time, automated, and visually intuitive.

3. Reports Created for HandsMenThreads

A suite of reports was developed to address requirements of different departments—Sales, Inventory, Marketing, and Management.

A. Sales Reports

1. Monthly Sales Performance Report

Shows:

- Total revenue generated
- Count of completed orders
- Growth comparison against previous months

This helps monitor overall business momentum.

2. Sales by Product Category

Breakdown of:

- Shirts
- Trousers
- Accessories
- Ethnic Wear

These insights help the buying team plan future inventory cycles.

B. Customer Reports

1. Top Customers by Spend

Uses Customer__c.Total_Spend__c to identify high-value customers for loyalty and targeted campaigns.

2. Loyalty Tier Distribution Report

Displays total customers in:

- Silver
- Gold
- Platinum

Helps monitor loyalty engagement and track customer retention success.

C. Inventory Reports

1. Low-Stock Product Report

Shows SKUs below reorder levels.

This report is used daily by the Inventory Manager to avoid stockouts.

2. Product Sales Velocity Report

Measures how fast each SKU sells over time, enabling demand forecasting.

D. Marketing Reports

1. Campaign Influence Report

Shows the number of orders influenced by a marketing campaign.

2. Discount Effectiveness Report

Highlights conversion rate and revenue contribution from promotional campaigns.

4. Dashboards Created for HandsMenThreads

Reports were brought together into dynamic dashboards to provide real-time visibility.

A. HandsMenThreads Executive Dashboard

Primary dashboard designed for leadership. Includes:

- Total monthly revenue
- Top 5 selling products
- Category performance charts
- Low-stock alert widget
- Loyalty tier summary
- Order status funnel (Placed → Packed → Shipped → Delivered)

This dashboard acts as the brand's command center.

B. Sales Performance Dashboard

Designed for Sales Executives and Sales Managers.

Displays:

- Daily orders
- Pending deliveries
- Sales target vs. achievement
- Average order value

Sales teams now track progress without manual calculations.

C. Inventory Management Dashboard

A specialized dashboard for Inventory teams.

Key components:

- Real-time stock chart
- Low-stock alert panel
- Reorder recommendations
- Sales velocity of key products

It educates stocking decisions and reduces operational risk.

D. Marketing & Campaign Dashboard

Helps the marketing team evaluate campaign ROI.

Includes:

- Campaign performance bar chart
- Customer acquisition cost
- Conversions by campaign
- Revenue influence metrics

Marketing went from guesswork to data-driven planning.

5. Security Review

HandsMenThreads handles confidential information such as customer data, sales performance, internal pricing structures, and supplier details. A thorough security review ensures compliance, integrity, and controlled access.

A. Profile & Permission Review

Profiles were audited to ensure **least privilege access**:

- **Sales Executives:** Cannot delete orders or modify product pricing.
- **Inventory Managers:** Cannot access customer purchase history.
- **Marketing Managers:** Cannot edit orders or stock.
- **Admin:** Full access with logging privileges.

This ensures role-specific access and reduces operational fraud or mistakes.

B. Field-Level Security (FLS)

Sensitive fields such as:

- Customer email

- Loyalty points
- Product pricing
- Supplier details

Were restricted to appropriate profiles.

C. Audit Trail Review

Salesforce Setup Audit Trail was reviewed to track:

- Object modifications
- Automation rule changes
- Profile edits
- Login attempts

Audit logs strengthen internal governance and transparency.

D. Session Security & Login Controls

Enabled features include:

- Login hour restrictions for employees
- IP-based access controls
- Multi-factor authentication (MFA)

This protects the CRM from unauthorized access.

E. Sharing Model Review

Org-Wide Defaults:

- Customer__c = Private
- Order__c = Private
- Product__c = Public Read Only

Sharing rules extend needed access without compromising data privacy.

6. Conclusion

Phase 8B elevated HandsMenThreads into a data-driven retail business. Reports and dashboards empowered leadership to make informed decisions, track trends, and optimize processes. Simultaneously, the security review ensured that the CRM remained protected, compliant, and

aligned with industry standards. Together, reporting and security form a robust analytical and operational framework essential for sustainable business growth.