

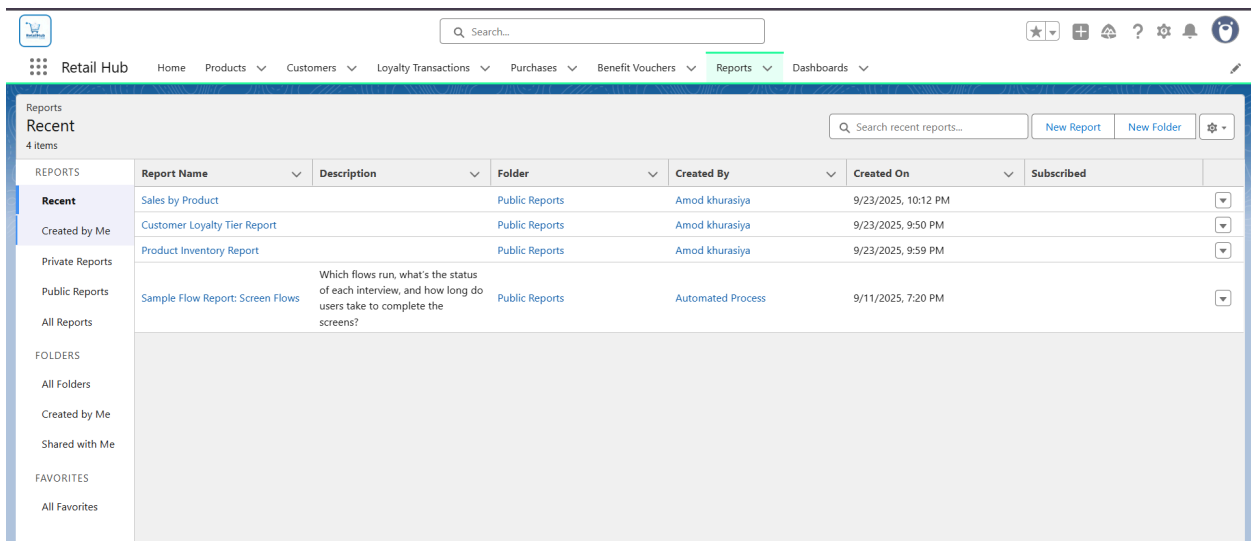
Phase 9: Reports & Dashboards

Phase 9 of the RetailHub CRM project focused on **Business Intelligence**, empowering managers and decision-makers with real-time insights into key operational metrics. In modern retail operations, access to accurate, timely, and visually interpretable data is essential for monitoring business performance, identifying trends, and making informed decisions. Salesforce provides a suite of reporting and visualization tools that allow organizations to analyze data effectively. For RetailHub, both **Reports** and **Dashboards** were leveraged to create a comprehensive management interface.

9.1 Reports

Reports in Salesforce are **powerful analytical tools** that allow users to filter, group, summarize, and present data from objects within the system. They provide a foundational layer for understanding business processes, trends, and operational performance.

For the RetailHub project, the focus was on creating reports that could answer key management questions, such as customer loyalty distribution, product inventory status, and sales performance by item.



9.1.1 Customer Loyalty Tier Report

Objective:

The primary goal of this report was to provide managers with a **clear and immediate view of customer loyalty distribution** across the organization. Understanding customer engagement and loyalty levels is crucial for designing retention strategies, promotions, and rewards programs.

Report Type: Summary Report

Data Source: Customer__c object

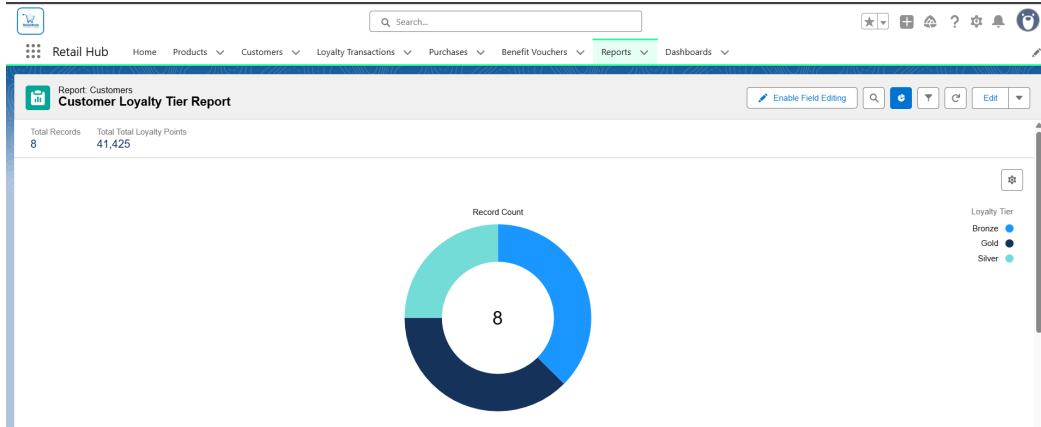
Key Fields:

- Customer Name
- Loyalty Tier (Bronze, Silver, Gold)
- Total Loyalty Points

Grouping: Customers were grouped by **Loyalty Tier**.

Business Impact:

- Provides insights into the **distribution of loyalty tiers** among the customer base.
- Highlights the proportion of customers at risk (Bronze tier) and those providing maximum value (Gold tier).
- Enables managers to design targeted marketing campaigns and personalized rewards.
- Acts as a **source for a dashboard component**, enabling visual representation for high-level decision-making.



<input type="checkbox"/> Loyalty Tier ↑	Customers: Full Name	Total Loyalty Points
<input type="checkbox"/> Bronze (3)	test user 2	25
	user 5	0
	Online Customer	0
Subtotal		25
<input type="checkbox"/> Gold (3)	test user 1	17,070
	test user 3	16,035
	test 4	5,000
Subtotal		38,105
<input type="checkbox"/> Silver (2)	anuj kori	1,025
	new user	2,270
Subtotal		3,295
Total (8)		41,425

9.1.2 Product Inventory Report

Objective:

To maintain operational efficiency, managers and sales representatives require **real-time visibility into product inventory levels**. This report was designed to provide a detailed list of all products, along with their stock levels and other critical attributes.

Report Type: Tabular Report

Data Source: Product__c object

Key Fields:

- Product Name
- Price
- Stock Quantity
- Low-Stock Threshold

Business Impact:

- Provides a **quick reference for inventory management**, ensuring products are always available for sales.
- Helps identify items approaching low-stock thresholds, allowing proactive replenishment.
- Supports operational planning and minimizes the risk of stockouts.
- Can be referenced for automated notifications or alerts for inventory restocking.



Report: Products

Product Inventory Report

Total Records	Total Price	Total Stock Quantity
21	₹89,920.00	2,616

	Product: Product Name <input type="text"/>	Price <input type="text"/>	Stock Quantity <input type="text"/>
1	Laptop Stand	₹1,500.00	100
2	Wireless Mouse	₹800.00	250
3	Keyboard	₹2,200.00	150
4	USB-C Hub	₹3,000.00	75
5	Monitor Riser	₹1,200.00	90
6	Webcam	₹2,500.00	60
7	External Hard Drive	₹4,500.00	40
8	Gaming Headset	₹3,500.00	120
9	Portable SSD	₹6,000.00	80
10	Mechanical Keyboard	₹4,000.00	55
11	Ergonomic Chair	₹15,000.00	30
12	Desk Lamp	₹2,000.00	200
13	Bluetooth Speaker	₹3,500.00	140
14	Smartphone Stand	₹900.00	160
15	Power Bank	₹1,800.00	300
16	HDMI Cable	₹500.00	500
17	Wi-Fi Router	₹7,000.00	45
18	Graphics Tablet	₹8,000.00	70
19	Smartwatch	₹12,000.00	85
20	Noise Cancelling Headphones	₹10,000.00	65
21	test product	₹20.00	1
22		₹89,920.00	2,616

9.1.3 Sales by Product Report

Objective:

To assess **product performance and revenue generation**, this report consolidates sales data at the product level. It enables managers to identify **top-performing items** and underperforming products that may require attention.

Report Type: Summary Report

Data Source: Purchase Line Item__c object

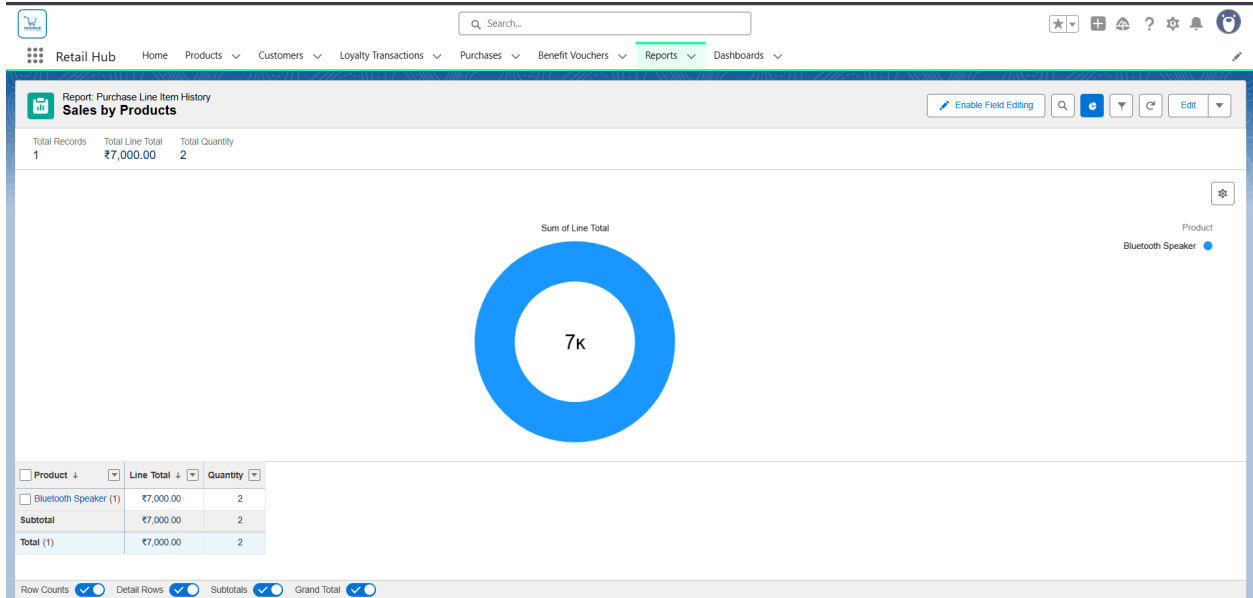
Key Fields:

- Product Name
- Line Total (Revenue per product)

Grouping: Records were grouped by **Product Name**.

Business Impact:

- Provides a **clear view of revenue contribution by product**, aiding inventory planning and promotional strategies.
- Allows managers to detect trends, such as seasonal demand fluctuations or high-performing SKUs.
- Supports pricing and discounting decisions by highlighting items with the highest or lowest sales.
- Acts as a foundational component for the **Retail Hub Manager Dashboard**, enabling visualization of sales performance.



9.1.4 Best Practices Applied in Report Design

1. **Data Accuracy:** Ensured all source objects had correct relationships and field validations in place.
2. **Dynamic Filters:** Reports were configured with filters such as date ranges, product categories, and customer segments to allow managers to view relevant subsets of data.
3. **Scheduling:** Reports were configured for scheduled delivery via email to key stakeholders, providing **continuous, automated visibility** into critical metrics.
4. **User Accessibility:** Reports were shared using Salesforce's **role-based access**, ensuring only authorized users could view sensitive customer or sales data.

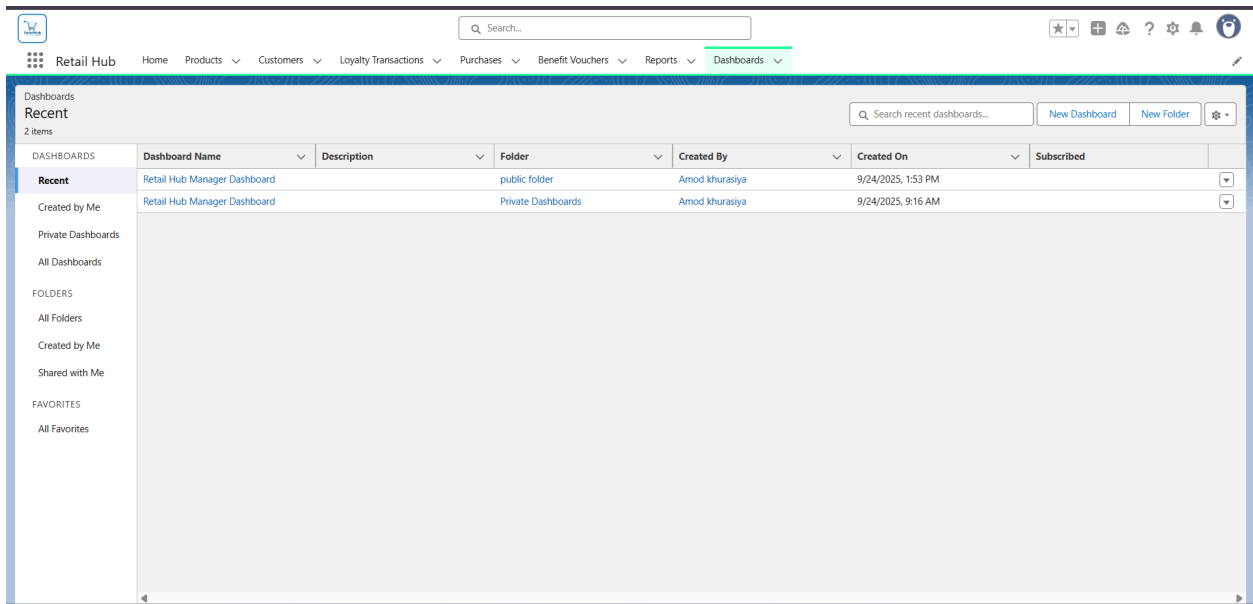
By implementing these reports, the RetailHub CRM project achieved **high-quality, actionable business intelligence**, forming the backbone of managerial decision-making.

9.2 Dashboards

While reports provide raw data and analytical insight, **Dashboards transform data into visual stories**, allowing decision-makers to quickly grasp business trends and make strategic

decisions. Dashboards consolidate multiple reports into a **single, interactive interface**, presenting KPIs in charts, graphs, and tables.

For the RetailHub project, a **Retail Hub Manager Dashboard** was created as the central command center for Store Managers, combining customer loyalty, sales performance, and inventory information in a single view.



9.2.1 Retail Hub Manager Dashboard

Objective:

To provide managers with a **high-level overview of business health** in a single interface, enabling them to make informed decisions without navigating multiple reports.

Components and Configuration:

1. Customer Tier Distribution (Donut Chart):

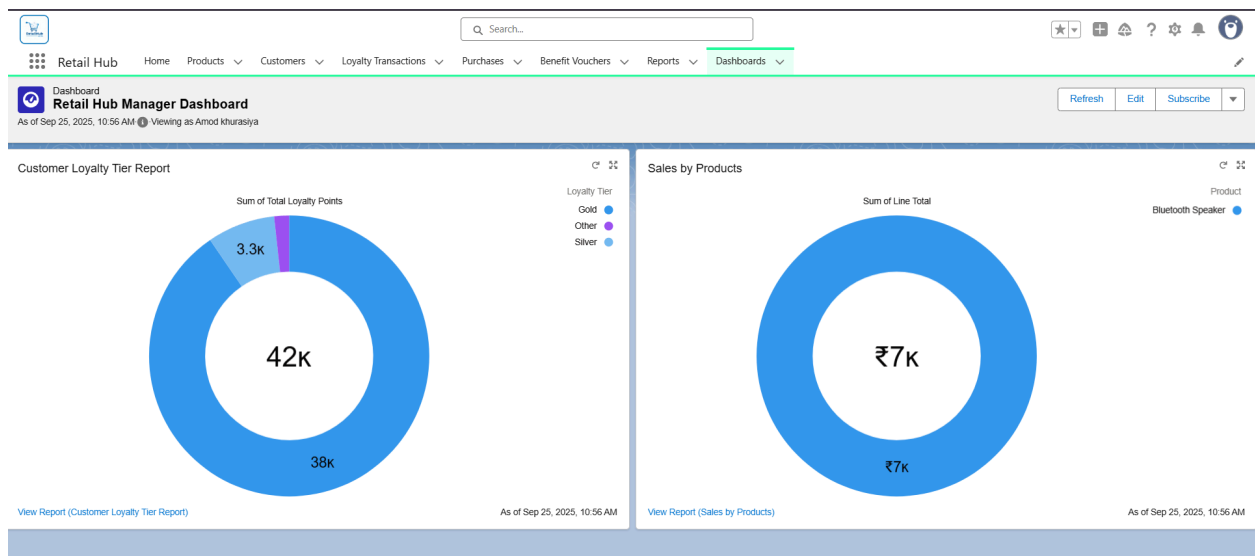
- **Source Report:** Customer Loyalty Tier Report
- **Purpose:** Visually displays the proportion of customers in each loyalty tier (Bronze, Silver, Gold).
- **Impact:** Managers can quickly assess the effectiveness of loyalty programs and identify opportunities for promotions or rewards.

2. Sales by Product (Bar Chart):

- **Source Report:** Sales by Product Report
- **Purpose:** Displays total revenue by product in a bar chart format, making it easy to identify top-selling items.
- **Impact:** Supports inventory planning, promotional strategies, and pricing decisions.

3. Product Inventory List (Table Component):

- **Source Report:** Product Inventory Report
- **Purpose:** Displays products along with stock quantity, price, and low-stock indicators.
- **Impact:** Provides a real-time reference for inventory levels directly on the dashboard, enabling timely replenishment decisions.



Dashboard Design Features:

- **Dynamic Filters:** Managers can filter the entire dashboard by store location, date range, or product category, enabling comparative analysis.
- **Real-Time Updates:** Dashboard components are configured to refresh automatically, ensuring managers always see the latest data.

- **Interactive Drill-Down:** Charts and tables allow users to click through to detailed underlying reports for deeper analysis.
 - **Default Home Page Assignment:** The dashboard is set as the default Home Page for managerial users, ensuring **immediate access** to critical metrics upon login.
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9.2.2 Benefits of Dashboard Implementation

1. **Centralized Management View:** All key metrics are available in one interface, saving time and reducing complexity.
 2. **Visual Decision Support:** Graphical representations make trends and patterns immediately apparent.
 3. **Operational Efficiency:** Quick identification of low-stock products or declining sales allows timely intervention.
 4. **Customer Insights:** Customer loyalty visualizations inform targeted marketing and promotional campaigns.
 5. **Performance Monitoring:** Managers can track sales and operational KPIs against targets, enabling proactive management.
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9.2.3 Dashboard Best Practices

- **KPI Selection:** Only key metrics with actionable insights were included to avoid clutter.
 - **Consistency in Design:** Uniform color schemes and chart types were used to improve readability.
 - **Security and Access:** Dashboard visibility was aligned with Salesforce Roles and Profiles to maintain data confidentiality.
 - **Scalability:** Components were configured to allow easy addition of future reports and metrics as business requirements evolve.
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9.3 Summary of Reports & Dashboards Phase

The Reports and Dashboards phase ensured that RetailHub CRM not only stored and processed data effectively but also **transformed it into actionable intelligence**. Managers can now:

- Monitor customer loyalty trends
- Track product sales and revenue contribution
- Maintain optimal inventory levels
- Make data-driven operational and strategic decisions

By combining **summary reports, tabular reports, and visual dashboard components**, the RetailHub CRM project delivered a **comprehensive decision-support tool**, increasing operational transparency, improving performance monitoring, and providing a scalable foundation for future enhancements.