Smart E-Commerce CRM – Customer Engagement & Order Management System
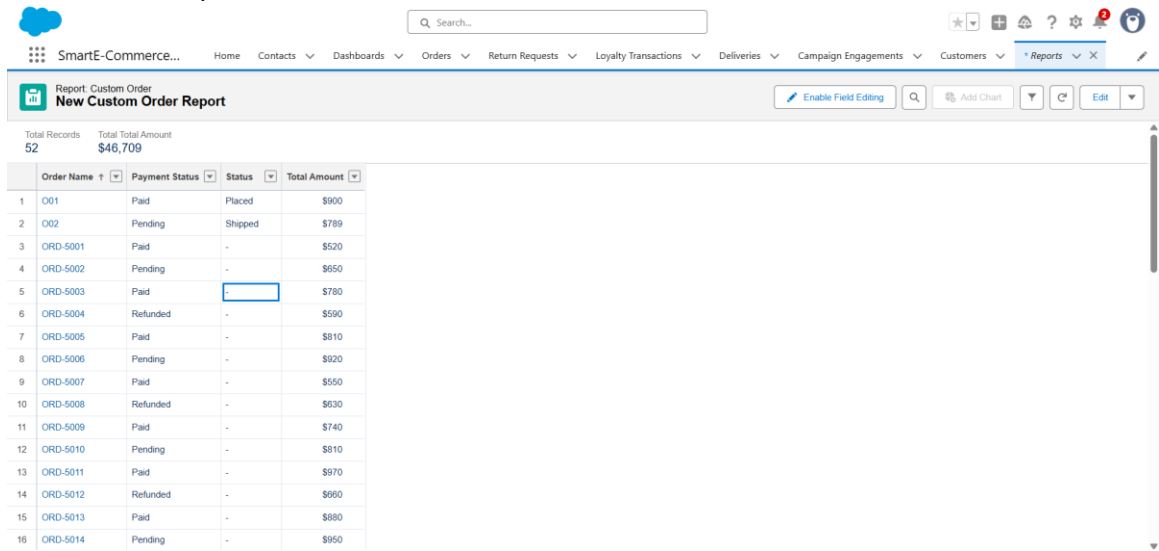
Phase 9: Reports, Dashboards, and Security Review

Overview

Phase 9 focuses on creating insightful reports and dashboards for the E-Commerce CRM and performing a security review to ensure proper access control and data protection.

Key Tasks and Enhancements

1. Reports Creation
   - Designed custom reports for Orders, Customers, and Sales.
   - Reports include metrics such as:
     • Daily/weekly/monthly sales by product category
     • Customer purchase history and lifetime value
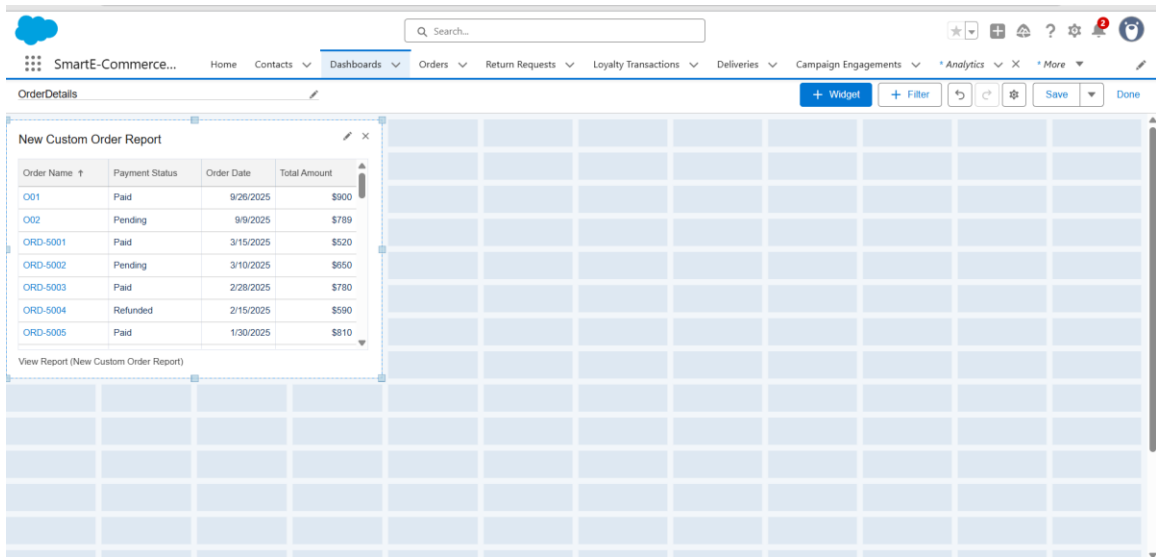   • Order return/refund statistics

2. Dashboards Design
- Built interactive dashboards with charts, tables, and KPIs.
- Included filters for region, sales team, and time period.
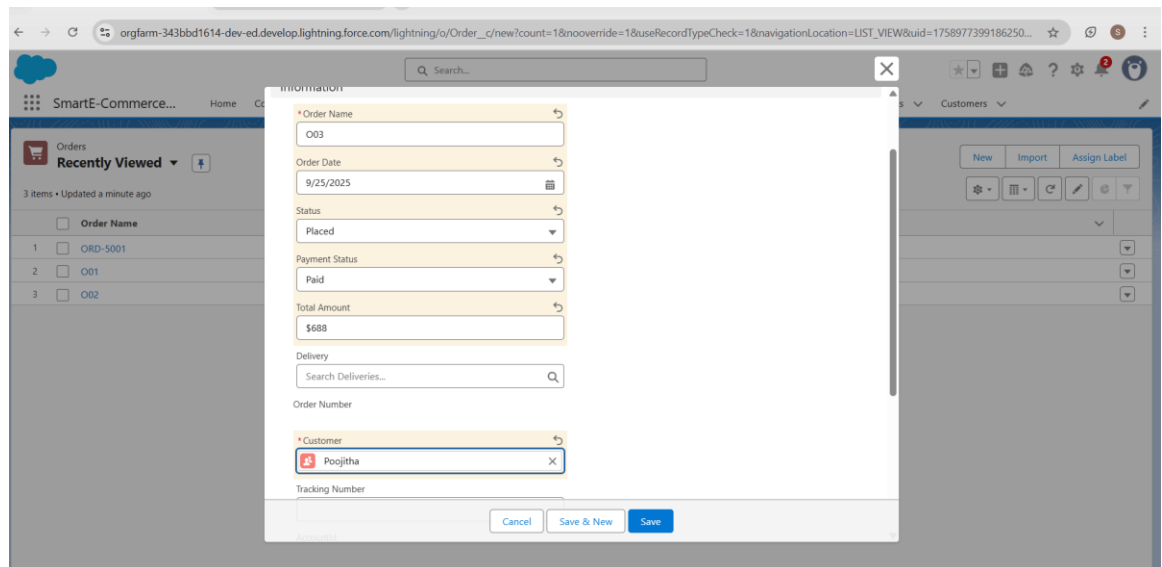- Customer Satisfaction dashboard for tracking support SLAs.

3. Security Review

- Reviewed Profiles and Permission Sets for role-based access.
- Verified object-level, field-level, and record-level security.
- Configured sharing rules for sales, customer support, and delivery teams.
- Ensured external API callouts comply with Salesforce security policies.

Tools & Technologies Used

• Salesforce Reports & Dashboards – Visualization and analytics
• Profiles & Permission Sets – Security configuration
• Sharing Rules & Role Hierarchy – Controlled access
• Lightning App Builder – Dashboard placement and customization