

Smart E-Commerce CRM – Customer Engagement & Order Management System

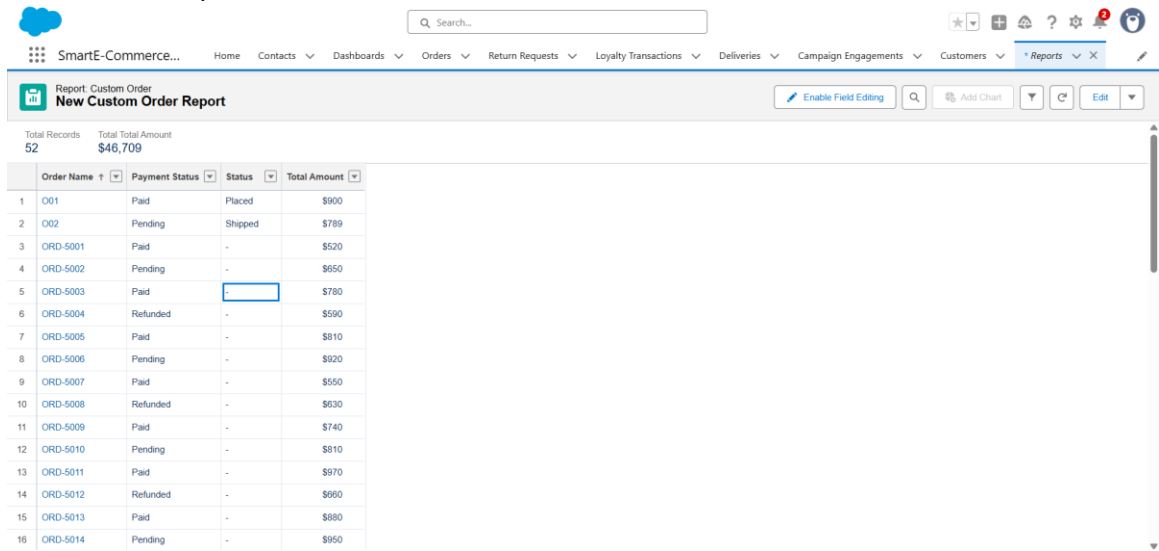
Phase 9: Reports, Dashboards, and Security Review

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

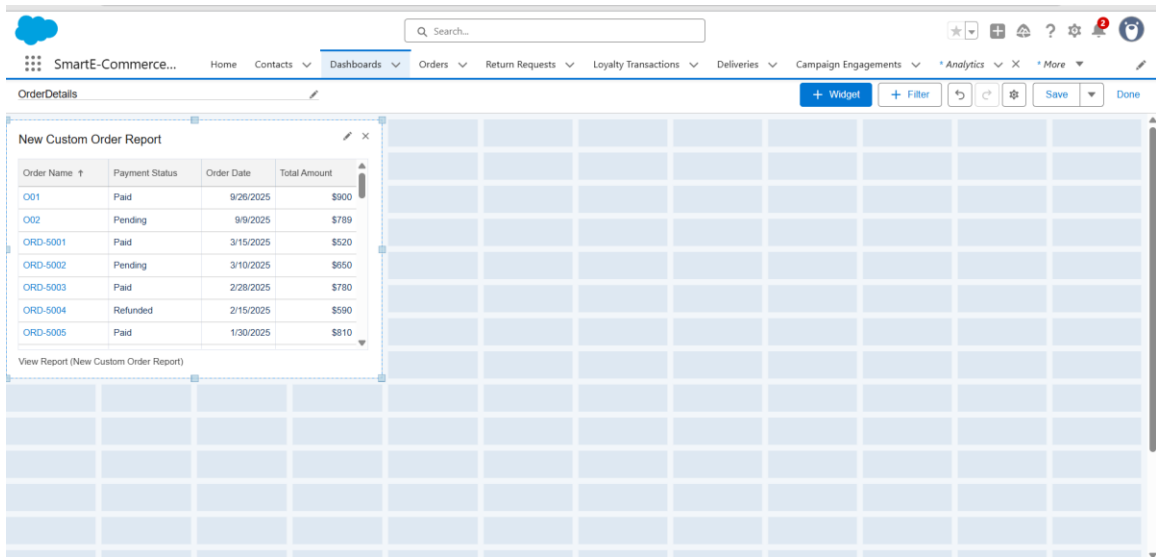


The screenshot displays the 'SmartE-Commerce...' application interface. At the top, there is a navigation bar with a search bar and several menu items: Home, Contacts, Dashboards, Orders, Return Requests, Loyalty Transactions, Deliveries, Campaign Engagements, Customers, and Reports. The 'Reports' menu is currently selected. Below the navigation bar, the main content area shows a 'Report: Custom Order' titled 'New Custom Order Report'. This report includes a table with the following data:

	Order Name	Payment Status	Status	Total Amount
1	001	Paid	Placed	\$900
2	002	Pending	Shipped	\$789
3	ORD-5001	Paid	-	\$520
4	ORD-5002	Pending	-	\$650
5	ORD-5003	Paid	-	\$780
6	ORD-5004	Refunded	-	\$590
7	ORD-5005	Paid	-	\$810
8	ORD-5006	Pending	-	\$920
9	ORD-5007	Paid	-	\$550
10	ORD-5008	Refunded	-	\$630
11	ORD-5009	Paid	-	\$740
12	ORD-5010	Pending	-	\$810
13	ORD-5011	Paid	-	\$970
14	ORD-5012	Refunded	-	\$660
15	ORD-5013	Paid	-	\$880
16	ORD-5014	Pending	-	\$950

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.



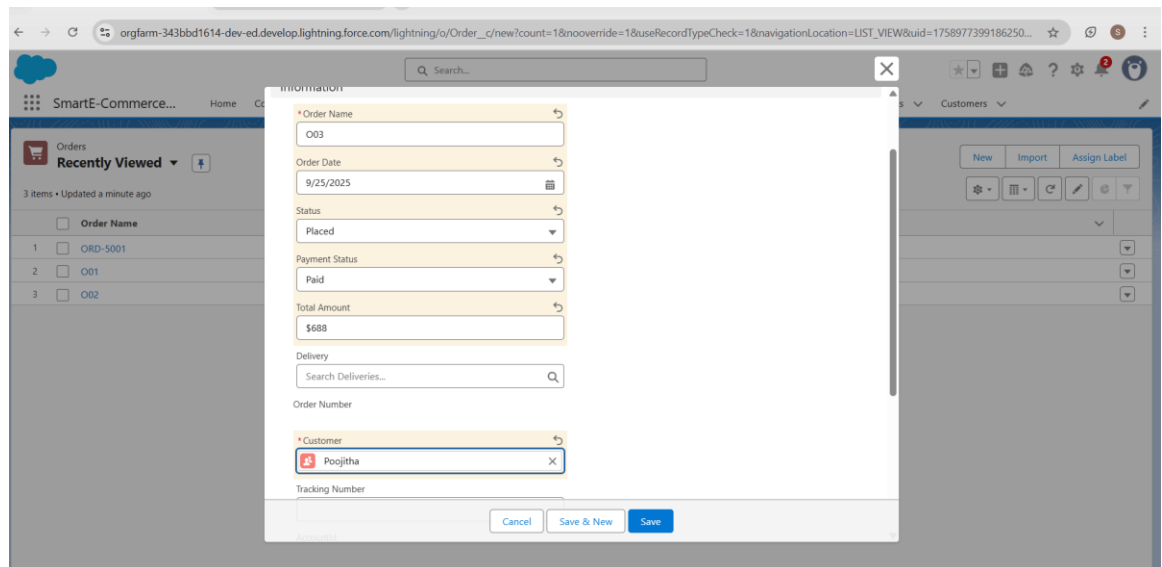
The screenshot shows a Salesforce dashboard for 'SmartE-Commerce...'. The 'Dashboards' tab is active, displaying a 'New Custom Order Report' widget. The widget contains a table with the following data:

Order Name	Payment Status	Order Date	Total Amount
O01	Paid	9/26/2025	\$900
O02	Pending	9/9/2025	\$789
ORD-5001	Paid	3/15/2025	\$520
ORD-5002	Pending	3/10/2025	\$650
ORD-5003	Paid	2/28/2025	\$780
ORD-5004	Refunded	2/15/2025	\$590
ORD-5005	Paid	1/30/2025	\$810

Below the table, there is a link that says 'View Report (New Custom Order Report)'.

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.



The screenshot shows a Salesforce Lightning App Builder interface. A 'New' button is visible in the top right. The main content area displays a form for creating a new order. The form fields are as follows:

- Order Name:** O03
- Order Date:** 9/25/2025
- Status:** Placed
- Payment Status:** Paid
- Total Amount:** \$688
- Delivery:** Search Deliveries...
- Order Number:**
- Customer:** Poojitha
- Tracking Number:**

At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

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