

Phase 9: Reporting, Dashboards & Security Review

Objective:

- Provide actionable insights via reports and dashboards.
- Analyze customer behavior, purchase trends, and high-value customers.
- Ensure proper data security and user access via profiles.
- Validate the accuracy of data and automation used in the project.

Step 1: Customer Reports

1a. Customer Sales Summary Report

- Purpose:
Understand the overall customer distribution and loyalty points. Helps identify which tier has the highest number of customers.
- Fields Included:
 - Customer Name
 - Email
 - Tier (Gold, Silver, Bronze)
 - Loyalty Points
- Report Type: Summary Report
- Grouping: Tier → necessary for visualization in a Bar Chart
- Filters: None (all customers included)
- Dashboard Component: Bar Chart
- Report Name: Customer Sales Summary Report
- Summary reports allow grouping, which is essential for charts.
- Bar chart clearly shows how many customers are in each Tier.
- Useful for management to see distribution and plan loyalty programs.

Smart Retail Tracker

Customers Products Purchases Reports Dashboards

Report: Customers
Customer Sales Summary

Enable Field Editing Add Chart

Loyalty Points	Tier	Customers: ID	Customers: Customer Name	Email
- (5)	Gold (2)	a00f00000V1qva	Rohit Verma	rohit.verma@example.com
		a00f00000V1qvc	Vikram Singh	vikram.singh@example.com
	Subtotal			
	Silver (2)	a00f00000V1qvZ	Ananya Sharma	ananya.sharma@example.com
		a00f00000V1qvD	Sneha Reddy	sneha.reddy@example.com
	Subtotal			
	Bronze (1)	a00f00000V1qvb	Meera Nair	meera.nair@example.com
	Subtotal			
Subtotal				
500 (4)	Gold (4)	a00f00000UZICU	customer 1	pusariamaswini@gmail.com
		a00f00000UagM1	cust 2	pusariamaswini@gmail.com
		a00f00000UagM1	Gold Tier Customer	pusariamaswini@gmail.com

Row Counts Detail Rows Subtotals Grand Total

1b. Gold Tier Customer Report

- Purpose: Focus on high-value customers, analyze their loyalty points, and track their engagement.
 - Fields Included: Customer Name
 - Email
 - Tier (Gold, Silver, Bronze)
 - Loyalty Points
- Report Type: Summary Report
- Grouping: Tier
- Filters: Tier = Gold
- Dashboard Component: Pie Chart
- Report Name: Gold Tier Customer Report
- Pie chart shows proportion of Gold-tier customers among all Gold customers (or within a filtered dataset).
- Helps in targeted marketing campaigns or rewards programs.


The screenshot shows a web application interface for 'Smart Retail Tracker'. The top navigation bar includes a search bar and several icons. The main menu has 'Customers', 'Products', 'Purchases', 'Reports', and 'Dashboards'. The 'Reports' section is active, displaying a 'Customer report for gold tier'. The report header shows 'Total Records: 6' and 'Total Loyalty Points: 2,000'. The table below lists customer details and their loyalty points. At the bottom, there are toggle switches for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total', all of which are currently enabled.

Tier	Customers: Customer Name	Loyalty Points
Gold (6)	customer 1	500
	cust 2	500
	Gold Tier Customer	500
	customer 11	500
	Rohit Verma	-
	Vikram Singh	-
Subtotal		2,000
Total (6)		2,000

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒

Step 2: Purchase Report

- Purpose: Track all purchases, total revenue, and individual customer contributions.
- Fields Included:
 - Purchase Name / Order Name
 - Customer Name (lookup from Customer)
 - Total Amount
 - Purchase Date
- Report Type: Tabular Report
- Filters: Optional – Total Amount > 0 or Recent Purchases
- Dashboard Component: Table
- Report Name: Purchase Summary Report
- Tabular report is best for detailed lists of records.
- Provides a raw view of purchases and revenue for auditing or verification.
- Useful for operational teams to track recent transactions.



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Smart Retail Tracker

Customers

Products

Purchases

Reports

Dashboards

Report: Purchases

Purchase Summary Report

Enable Field Editing

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Add Chart

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Edit

⌵

Total Records

12

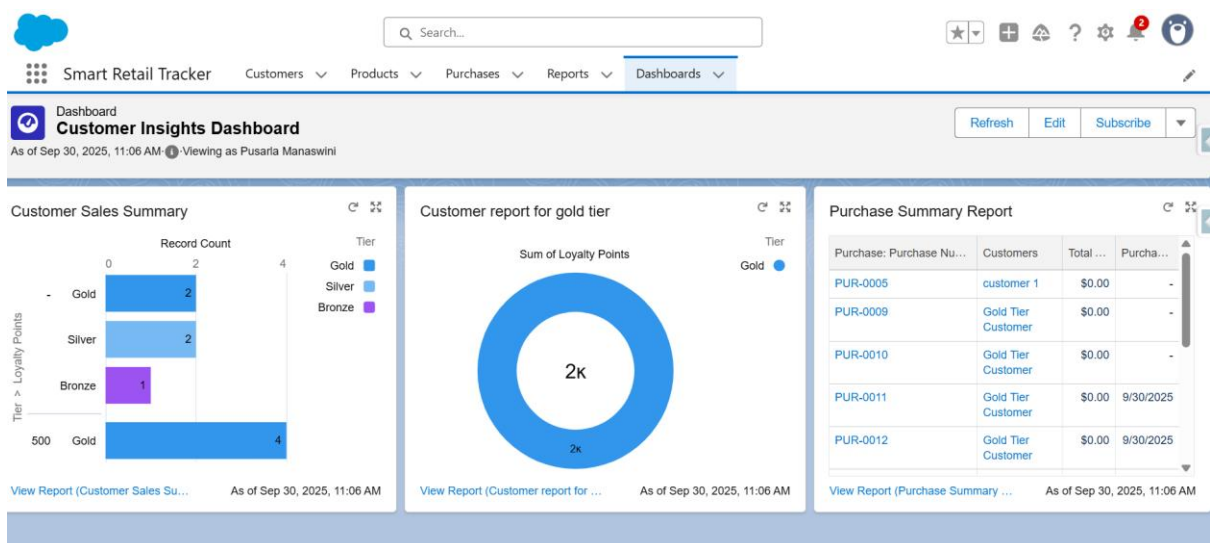
Total Total Amount

\$0.00

	Purchase: Purchase Number	Customers	Total Amount	Purchase Date
1	PUR-0005	customer 1	\$0.00	-
2	PUR-0012	Gold Tier Customer	\$0.00	9/30/2025
3	PUR-0015	Gold Tier Customer	\$0.00	-
4	PUR-0013	Gold Tier Customer	\$0.00	-
5	PUR-0010	Gold Tier Customer	\$0.00	-
6	PUR-0009	Gold Tier Customer	\$0.00	-
7	PUR-0011	Gold Tier Customer	\$0.00	9/30/2025
8	PUR-0014	Gold Tier Customer	\$0.00	-
9	PUR-0018	Gold Tier Customer	\$0.00	-
10	PUR-0016	customer 11	\$0.00	-
11	PUR-0017	Gold Tier Customer	\$0.00	-

Step 3: Dashboard Setup

- Customer Insights Dashboard:
 - Bar Chart → Customer Sales Summary Report → Customer count by Tier
 - Pie Chart → Gold Tier Customer Report → Focused view on Gold customers
 - Table → Purchase Summary Report → Shows all purchase records
- Dashboard allows interactive filtering: by Tier, Date, or Customer.
- Charts make it easy for stakeholders to interpret trends without reading raw data.
- Tables ensure detailed information is also accessible.
- Combining Bar, Pie, and Table gives a balanced view: overview + detail.



Step 4: Security Review

Profiles:

- Verify read/write access for Customer and Purchase objects.
- Restrict sensitive fields if necessary (e.g., Total Amount may be sensitive).

Sharing Rules:

- Ensure only authorized users can access customer or purchase records.

Testing:

- Use “Login as User” to confirm access and visibility.
- Test dashboards and reports to ensure users see only allowed data.
- Security review ensures data integrity and compliance.
- Helps in understanding how profiles control access in Salesforce.

Step 5: Outcome & Benefits

- Reports Created:
 - Customer Sales Summary (Bar Chart)
 - Gold Tier Customer (Pie Chart)
 - Purchase Summary (Table)
- Dashboards Functional: Bar, Pie, Table components visualizing customer and purchase data.
- Security Verified: Profiles provide correct access; sensitive data is protected.
- Business Impact:
 - Helps management identify high-value customers.
 - Allows tracking revenue and purchase trends.
 - Supports data-driven decisions and reporting.