# **Phase 9: Reporting, Dashboards & Security Review 📈**

**Project:** Supply Chain Traceability & Inventory Management System

**Goal:** Provide actionable insights through standardized reports and dashboards, and finalize data security controls using Field Level Security (FLS).

### **1. Key Business Reports**

Standard Salesforce reports were created to allow managers to track historical performance and inventory distribution.

| **Report Name** | **Type** | **Key Metrics** | **Audience** |
| --- | --- | --- | --- |
| **Product Shipments by Location** | Summary Report | Sum of Quantity\_\_c, Grouped by Retail\_Location\_\_c. | Tracks volume distribution by destination. |
| **Inventory Levels Matrix** | Matrix Report | Average Current\_Inventory\_\_c | Analyzes inventory distribution by Product (Rows) and Store (Columns). |

### **2. Dynamic Dashboard**

A dedicated dashboard was created to serve as the manager's central point of monitoring.

| **Dashboard Name** | **Type** | **Key Components** | **Purpose** |
| --- | --- | --- | --- |
| **Inventory Manager Dashboard** | Dynamic Dashboard | Low-Stock Alerts (from LWC), Real-time Inventory Chart, Shipment Status Gauge. | Provides personalized, actionable, real-time data based on the logged-in user's role/permissions. |

### **3. Field Level Security (FLS) Review**

FLS was implemented to ensure sensitive internal data is only visible to authorized personnel, reinforcing the security model established in Phase 2.

| **Field** | **Object** | **Profile Access (Example)** | **Rationale** |
| --- | --- | --- | --- |
| **Product\_\_c.Origin\_Details\_\_c** | Product\_\_c | Hidden from Inventory Manager; Visible to Quality Assurance Specialist. | Ensures sensitive manufacturing data is restricted to QA/compliance roles only. |
| **Lot\_\_c.Creation\_Timestamp\_\_c** | Lot\_\_c | Read-Only for all users. | Prevents unauthorized modification of audit trail data. |