# Phase 9: Reporting, Dashboards & Security Review

#### Introduction

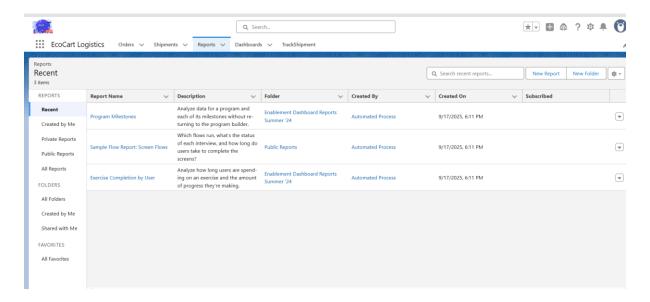
This phase ensures that managers and stakeholders can **monitor logistics performance** through reports and dashboards, while maintaining **data security** with Salesforce's robust access controls. EcoCart Logistics CRM uses Salesforce's **Reports & Dashboards** to provide insights on orders, shipments, and agent performance, and applies **field-level security, session controls, and audit trails** to safeguard sensitive data.

## **Objectives**

- Build meaningful **Reports** (shipment status, revenue, agent performance).
- Design **Dashboards** for managers and agents.
- Enable **Dynamic Dashboards** so users see only their data.
- Review **Sharing Settings** to align with business hierarchy.
- Configure Field-Level Security (FLS) to protect sensitive fields.
- Apply Session Settings and Login IP Restrictions for secure access.
- Enable Audit Trail to track changes and compliance.

## 1. Reports

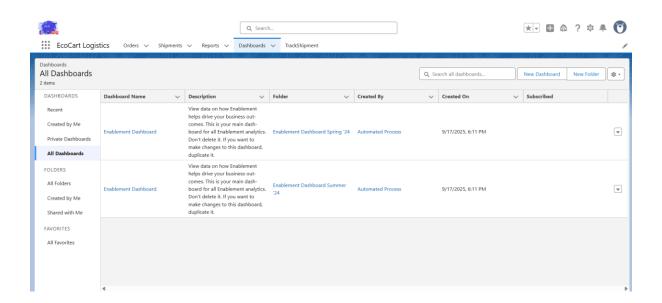
- Path: App Launcher → Reports → New Report.
- Created custom report types combining Orders + Shipments.
- Examples:
  - **Pending Shipments Report**: Filter Status = Pending.
  - **Delayed Shipments by Agent**: Group by Assigned Agent.
  - Revenue by Customer: Summarize Order Amount.



#### 2. Dashboards

- Path: App Launcher → Dashboards → New Dashboard.
- Examples:
  - Delivery Performance Dashboard: % Delivered on Time, Delayed Shipments.
  - Revenue Dashboard: Total Revenue by Month/Customer.

 Agent Productivity Dashboard: Shipments completed by each agent.



## 6. Field-Level Security (FLS)

- Path: Setup → Object Manager → [Object] → Fields & Relationships.
- Example:
  - Hide Customer ID Proof field from Agents.
  - · Managers can see/edit it.

## 7. Session Settings

- Path: Setup → Session Settings.
- Configured:
  - Session Timeout: 30 minutes.
  - Forced logout after timeout.

## 8. Login IP Ranges

- Path: Setup → Profiles → [Agent Profile] → Login IP Ranges.
- Restricted access so agents can only log in from office network
  IP range.

#### 9. Audit Trail

- Path: Setup → View Setup Audit Trail.
- Tracks changes made to org setup (e.g., new objects, fields, or sharing rules).
- Provides accountability for system admins.

#### **Results Achieved**

- Reports created for pending, delayed, and completed shipments.
- Dashboards provide managers with real-time insights into delivery performance and revenue.
- Dynamic dashboards ensure data visibility matches user role.
- Sensitive data protected with FLS, session controls, and IP restrictions.
- Audit Trail ensures compliance and accountability for system changes.

## **Next Steps**

- Move to Phase 10: Final Presentation & Demo Day.
- Prepare pitch presentation (Problem → Solution → Benefits).
- Showcase live demo (order creation → shipment update → dashboard report).
- Deliver handoff documentation (system design + user guide).
- Publish project to LinkedIn/Portfolio.