

Phase 9: Reporting, Dashboards & Security Review

Objective:

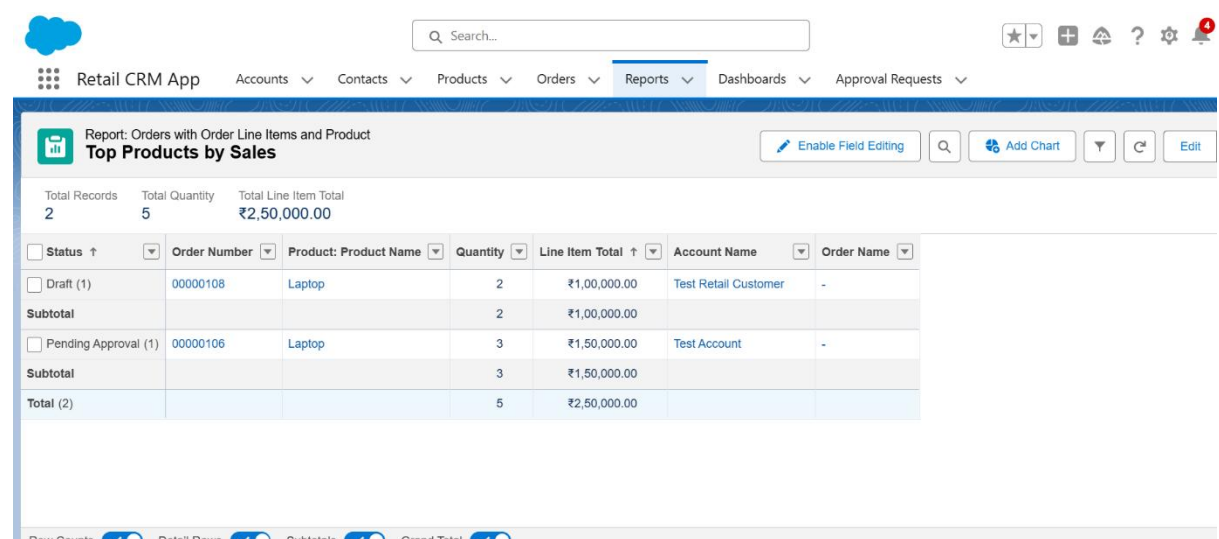
- Provide actionable insights via reports and dashboards.
- Analyze customer behavior, purchase trends, and high-value customers.
- Ensure proper data security and user access via profiles.
- Validate the accuracy of data and automation used in the project.

Reports

1. Top-Selling Products by Revenue

Report Type: Orders with Order Line Items and Product
Fields:

- Product Name (from Order Line Items or Product)
- Line Item Total (formula field)
- Quantity
- Group Rows: Product Name
- Summary: Sum of Line Item Total
- Purpose: Identify products generating highest revenue



The screenshot displays the 'Retail CRM App' interface. At the top, there is a search bar and navigation tabs for Accounts, Contacts, Products, Orders, Reports (selected), Dashboards, and Approval Requests. The main content area shows a report titled 'Report: Orders with Order Line Items and Product' and 'Top Products by Sales'. The report includes summary statistics: Total Records (2), Total Quantity (5), and Total Line Item Total (₹2,50,000.00). Below this is a table with columns: Status, Order Number, Product: Product Name, Quantity, Line Item Total, Account Name, and Order Name. The table contains two data rows for 'Laptop' products, each with a subtotal, and a final total row. The status of the first row is 'Draft (1)' and the second is 'Pending Approval (1)'. The account names are 'Test Retail Customer' and 'Test Account' respectively.

Status	Order Number	Product: Product Name	Quantity	Line Item Total	Account Name	Order Name
Draft (1)	00000108	Laptop	2	₹1,00,000.00	Test Retail Customer	-
Subtotal			2	₹1,00,000.00		
Pending Approval (1)	00000106	Laptop	3	₹1,50,000.00	Test Account	-
Subtotal			3	₹1,50,000.00		
Total (2)			5	₹2,50,000.00		

2. Customer Order Summary

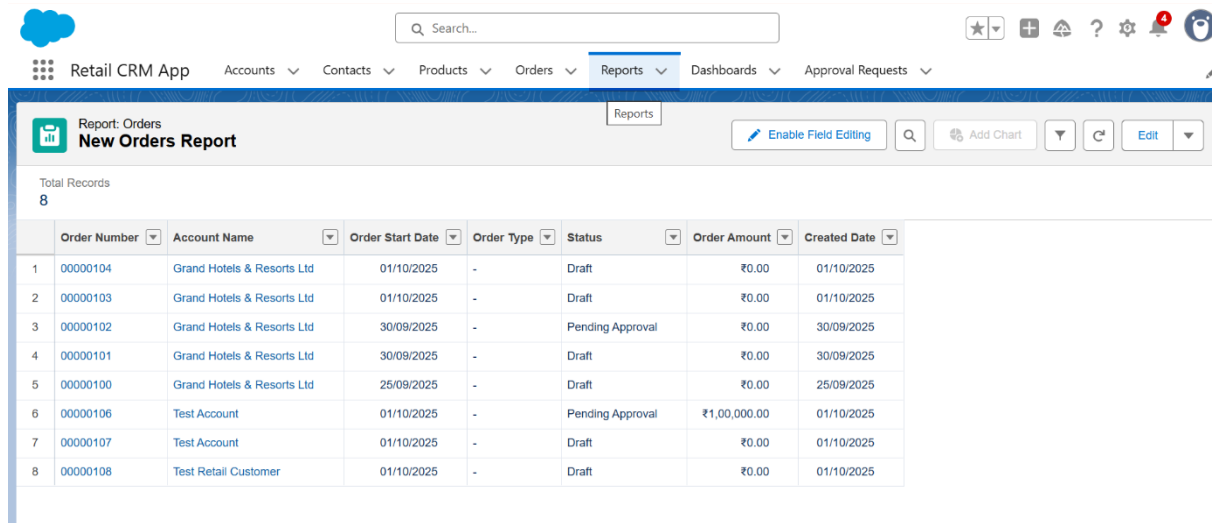
Report Type: Orders

Fields:

- Order Name
- Account Name
- Created Date

- Status
- Total Value

Purpose: See how many and what kind of orders each customer placed



The screenshot shows the 'Retail CRM App' interface. The top navigation bar includes 'Accounts', 'Contacts', 'Products', 'Orders', 'Reports' (selected), 'Dashboards', and 'Approval Requests'. The 'Reports' section is active, displaying the 'New Orders Report'. The report shows 8 total records. The table columns are: Order Number, Account Name, Order Start Date, Order Type, Status, Order Amount, and Created Date.

	Order Number	Account Name	Order Start Date	Order Type	Status	Order Amount	Created Date
1	00000104	Grand Hotels & Resorts Ltd	01/10/2025	-	Draft	₹0.00	01/10/2025
2	00000103	Grand Hotels & Resorts Ltd	01/10/2025	-	Draft	₹0.00	01/10/2025
3	00000102	Grand Hotels & Resorts Ltd	30/09/2025	-	Pending Approval	₹0.00	30/09/2025
4	00000101	Grand Hotels & Resorts Ltd	30/09/2025	-	Draft	₹0.00	30/09/2025
5	00000100	Grand Hotels & Resorts Ltd	25/09/2025	-	Draft	₹0.00	25/09/2025
6	00000106	Test Account	01/10/2025	-	Pending Approval	₹1,00,000.00	01/10/2025
7	00000107	Test Account	01/10/2025	-	Draft	₹0.00	01/10/2025
8	00000108	Test Retail Customer	01/10/2025	-	Draft	₹0.00	01/10/2025

3. Inventory/Product Catalog Report

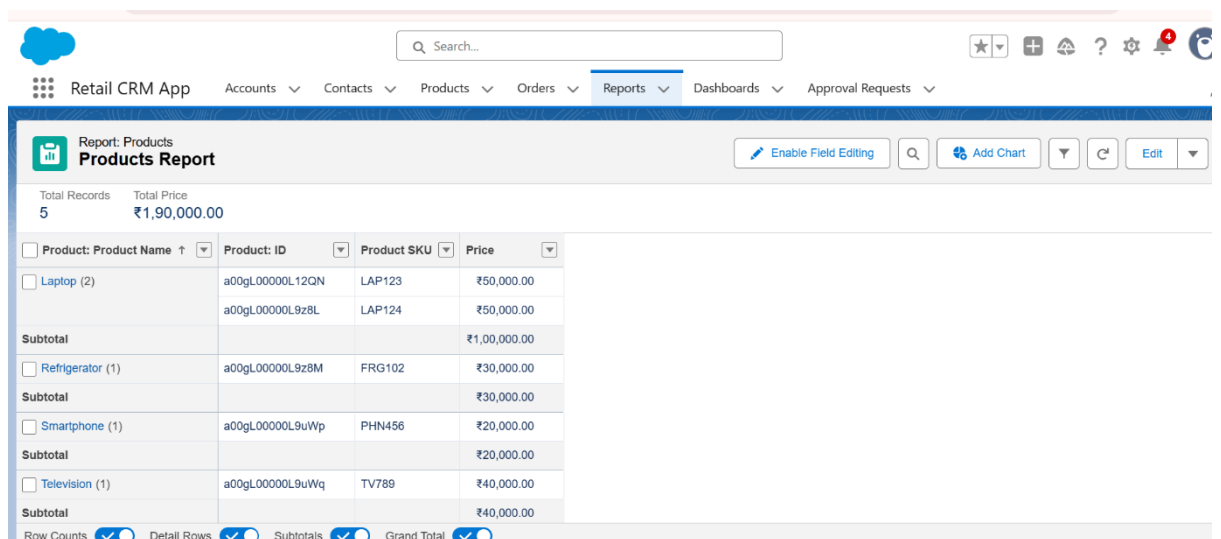
Report Type:

- If custom: Use the Custom Report Type you created on Product__c

Fields:

- Product Name
- Product Code or SKU
- Category__c
- Price / Unit Price
- Quantity in Stock

Purpose: Show current catalog with pricing and availability



The screenshot shows the 'Retail CRM App' interface. The top navigation bar includes 'Accounts', 'Contacts', 'Products', 'Orders', 'Reports' (selected), 'Dashboards', and 'Approval Requests'. The 'Reports' section is active, displaying the 'Products Report'. The report shows 5 total records with a total price of ₹1,90,000.00. The table columns are: Product Name, Product ID, Product SKU, and Price.

Product Name	Product ID	Product SKU	Price
Laptop (2)	a00gL00000L12QN	LAP123	₹50,000.00
	a00gL00000L9z8L	LAP124	₹50,000.00
Subtotal			₹1,00,000.00
Refrigerator (1)	a00gL00000L9z8M	FRG102	₹30,000.00
Subtotal			₹30,000.00
Smartphone (1)	a00gL00000L9uWp	PHN456	₹20,000.00
Subtotal			₹20,000.00
Television (1)	a00gL00000L9uWq	TV789	₹40,000.00
Subtotal			₹40,000.00

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

Dashboards

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.

Create the Dashboard

1. App Launcher → Retail CRM → Dashboards
2. Click New Dashboard
3. Enter Dashboard Name
4. Click Create

Click + Component

Choose one of your reports (Inventory, Customer Summary, Top-Selling)

Select a component type:

- Product Catalog → Table or Vertical Bar Chart
- Customer Order Summary → Bar Chart (e.g. number of orders per customer)
- Top-Selling Products → Pie Chart or Bar Chart showing revenue by product

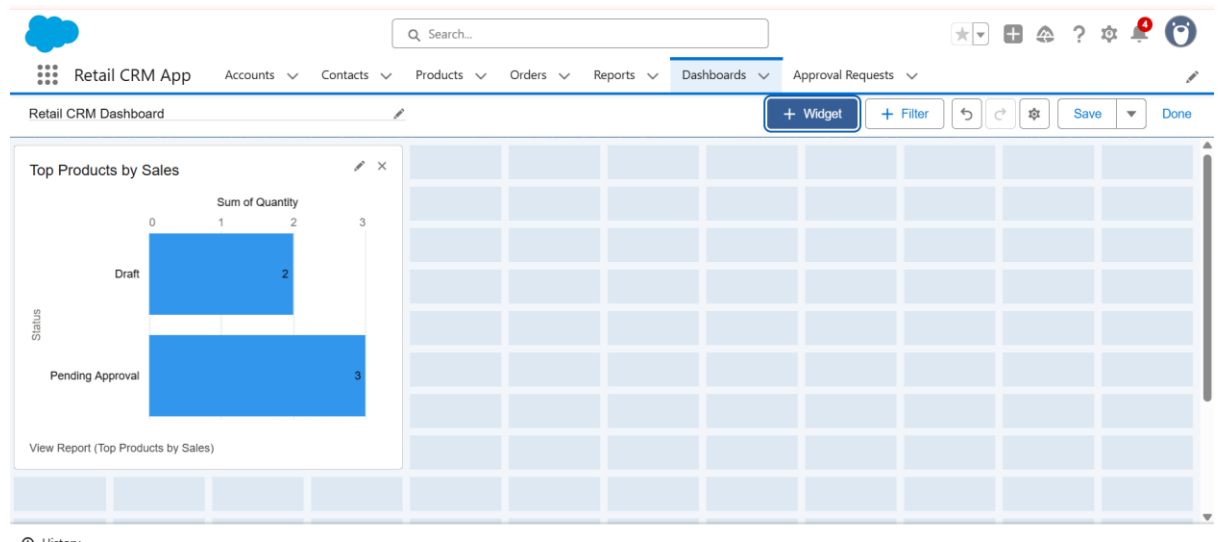
Configure axes and values accordingly

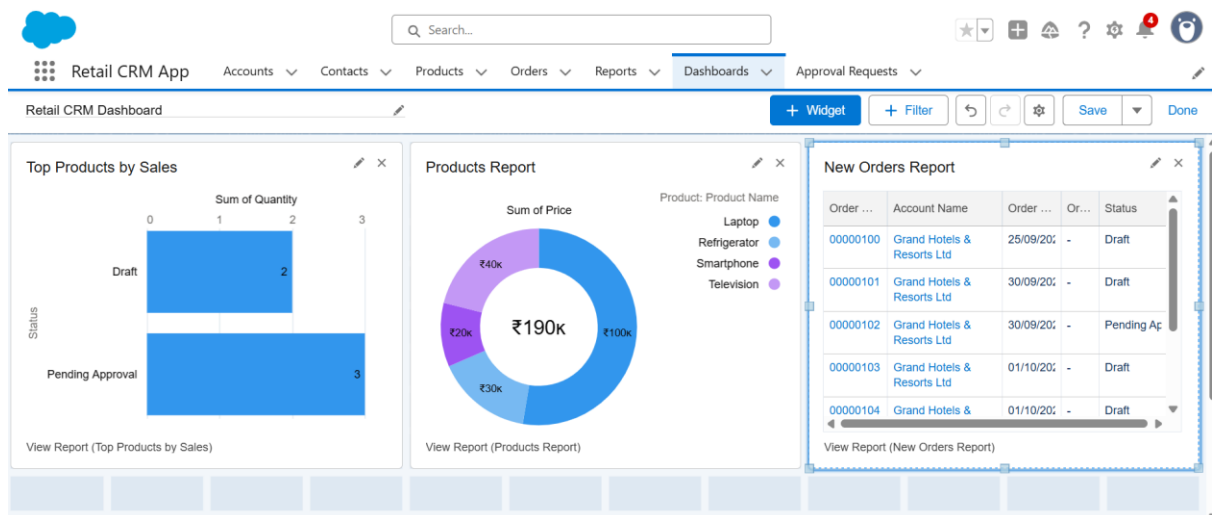
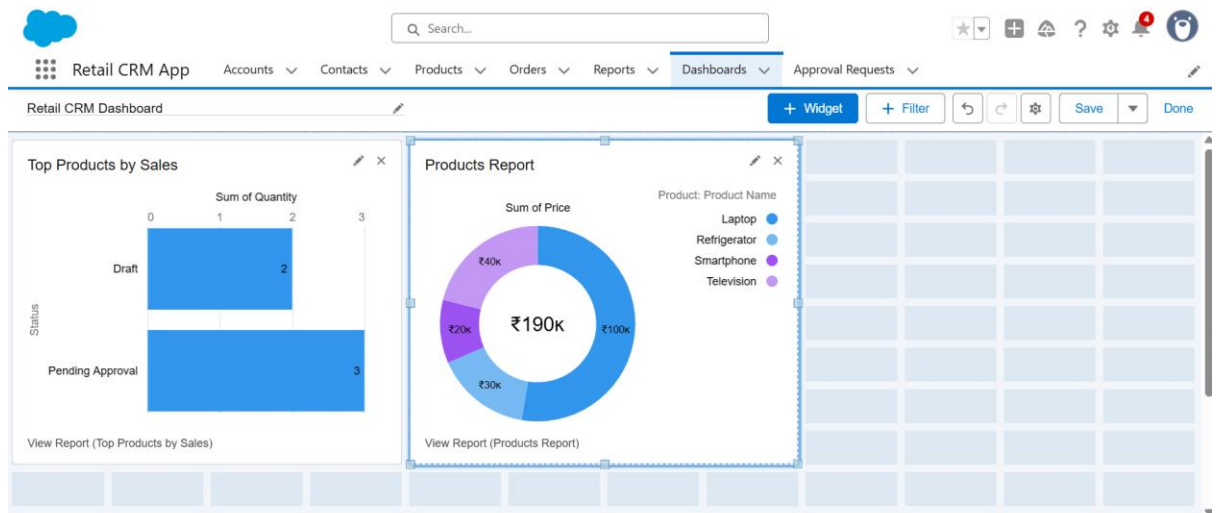
Click **Add**

Position components on the dashboard as you want

Save & View

1. Click Save
2. Click Done or Refresh
3. The dashboard should now show all three visualizations together





Security Review

Objectives

- Verify users have appropriate access to data based on their role
- Enforce least privilege principle using Profiles and Permission Sets
- Protect sensitive data fields using Field-Level Security (FLS)
- Ensure auditability with Login History and Setup Audit Trail
- Validate secure Apex coding practices (if custom code is used)
- **Key Areas Reviewed**

1. Profiles and Permission Sets

- Created custom profiles: Sales Agent, Service Agent
- Assigned object permissions for Accounts, Orders, Products, Order Line Items
- Created permission set: "Export Reports" for report access without editing rights
- Ensured only relevant users have CRUD access to sensitive data

2. Role Hierarchy

Created a role hierarchy representing the Retail CRM team

Verified that higher roles (e.g., Sales Manager) can view subordinate data

Ensured no excessive data visibility to non-managers

Field-Level Security

Set FLS for sensitive fields like Primary Contact Email, Total Order Value

Verified that only necessary profiles can view/edit these fields

Outcome

- The Retail CRM Salesforce application complies with platform security best practices.
- All roles and profiles are appropriately configured to protect data.
- Field and object access is restricted to minimize data exposure.
- The system is audit-ready with full tracking of admin actions.