Phase 9: Reporting, Dashboards & Security Review

Objective:

• Provide actionable insights via reports and dashboards.

• Analyze customer behavior, purchase trends, and high-value customers.

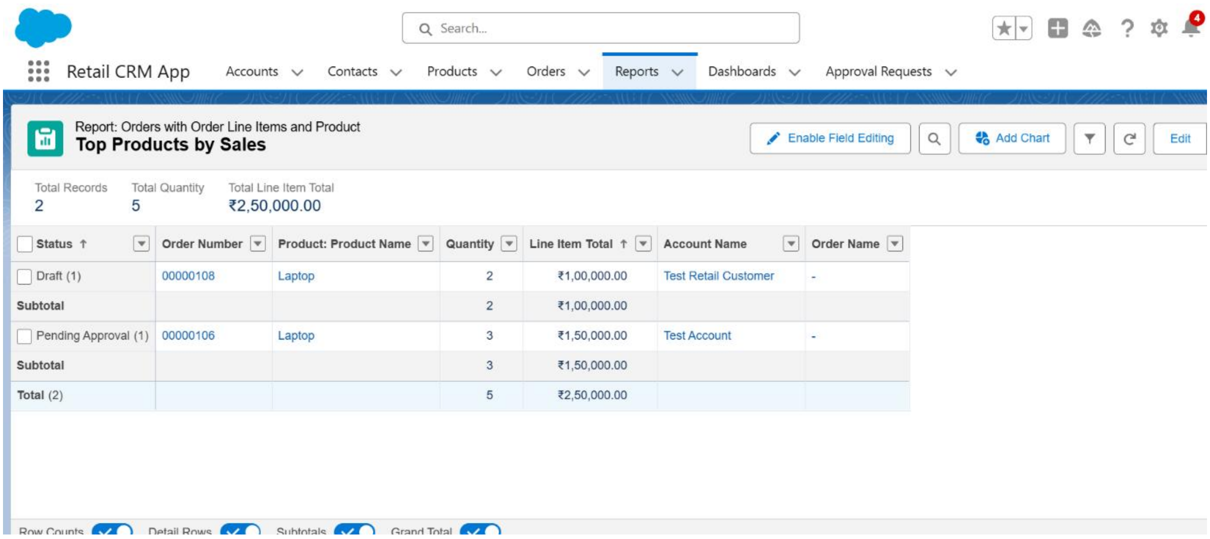
• Ensure proper data security and user access via profiles.

• 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

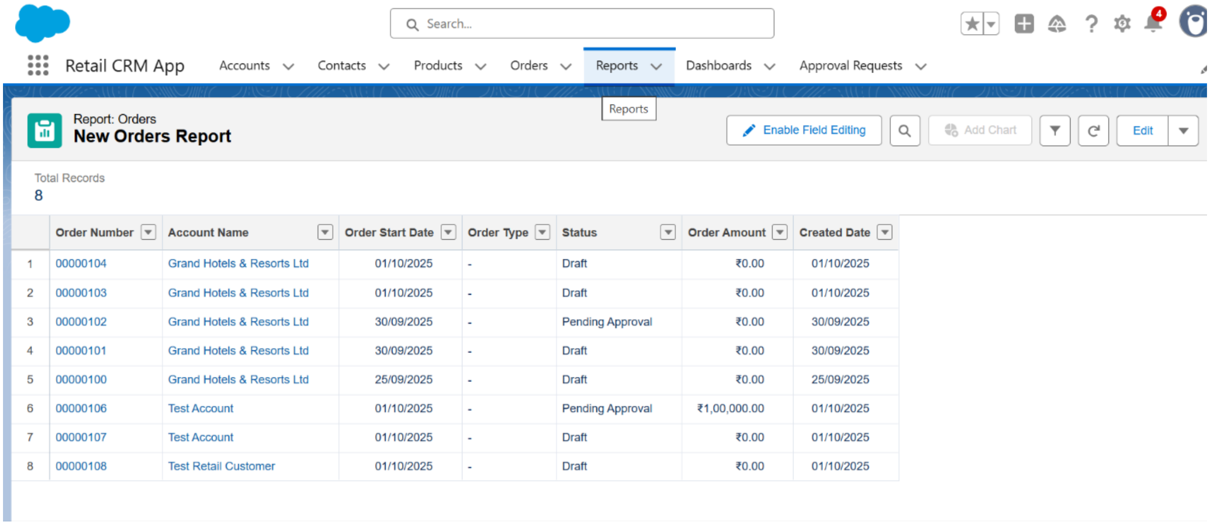


2. **Customer Order Summary**
   Report Type: Orders
   Fields:

- Order Name
- Account Name
- Created Date

- Status
- Total Value

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



	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**

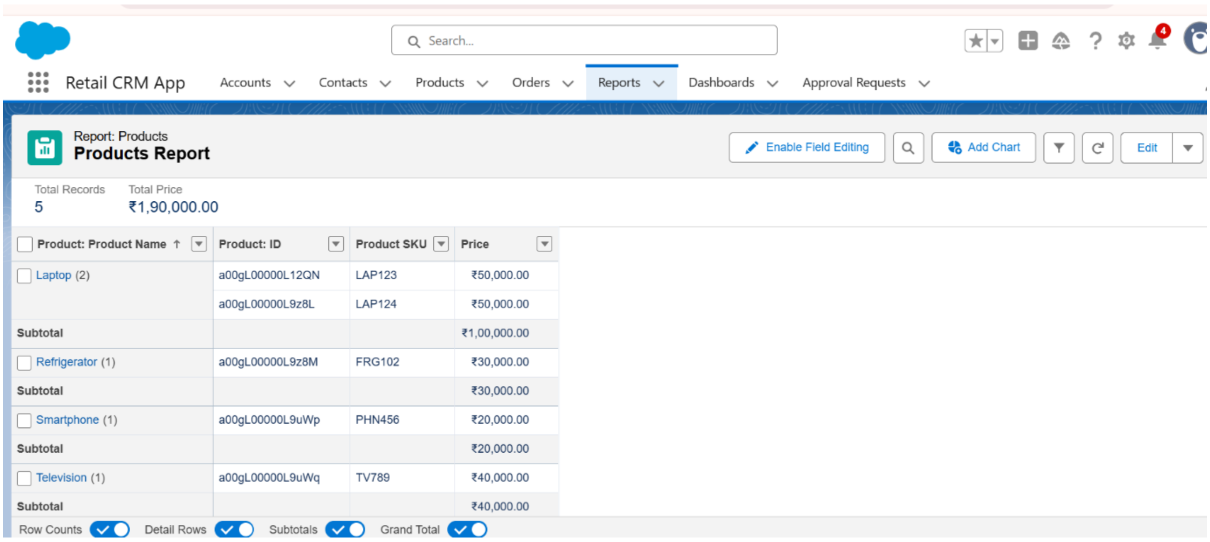
Report Type:

- 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



Product: 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

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

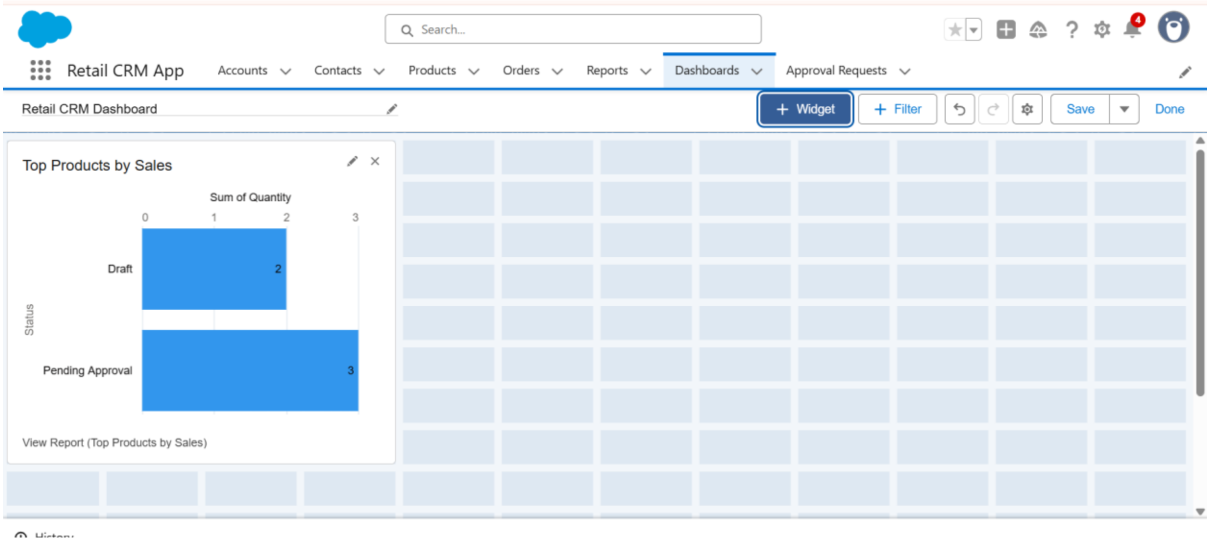
Configure axes and values accordingly

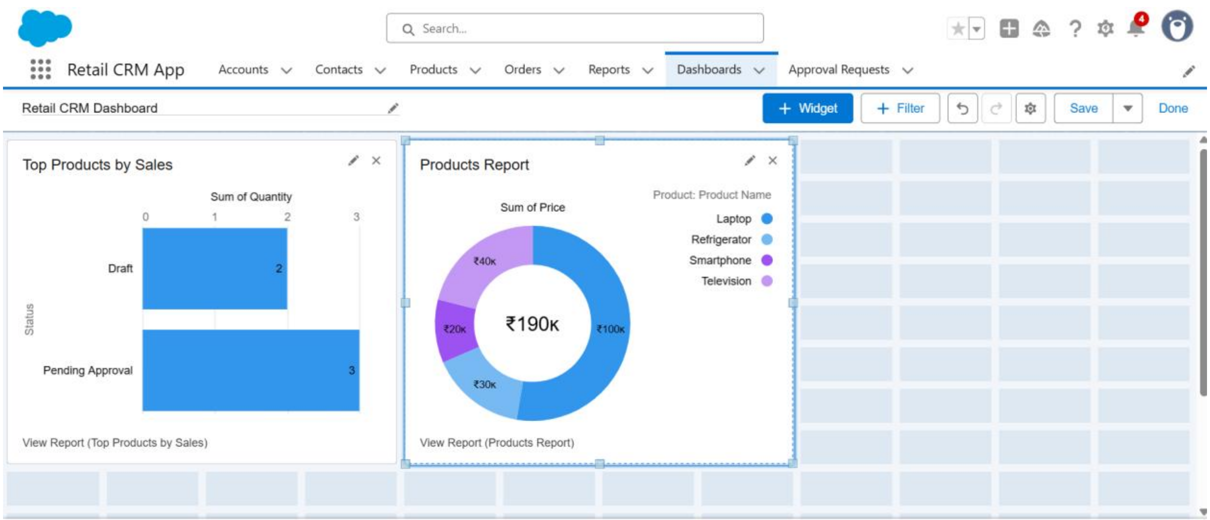
Click **Add**

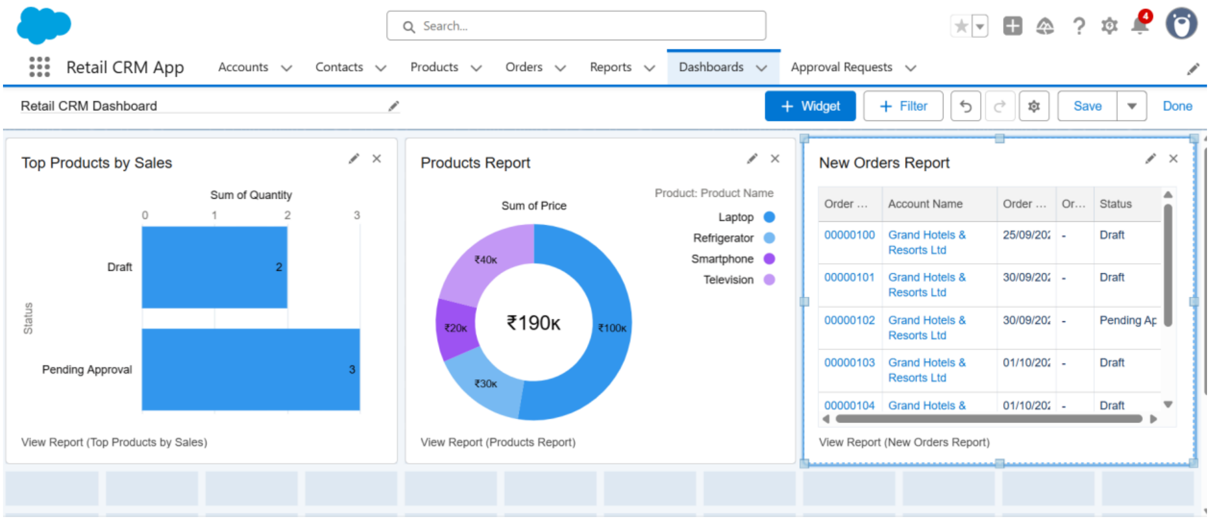
Position components on the dashboard as you want

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.