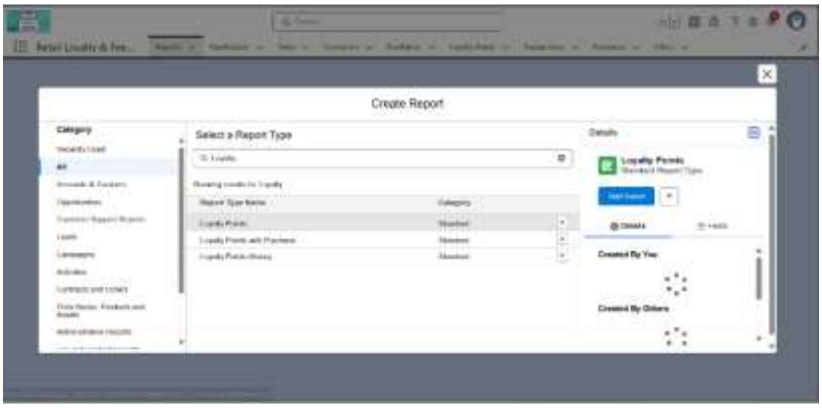
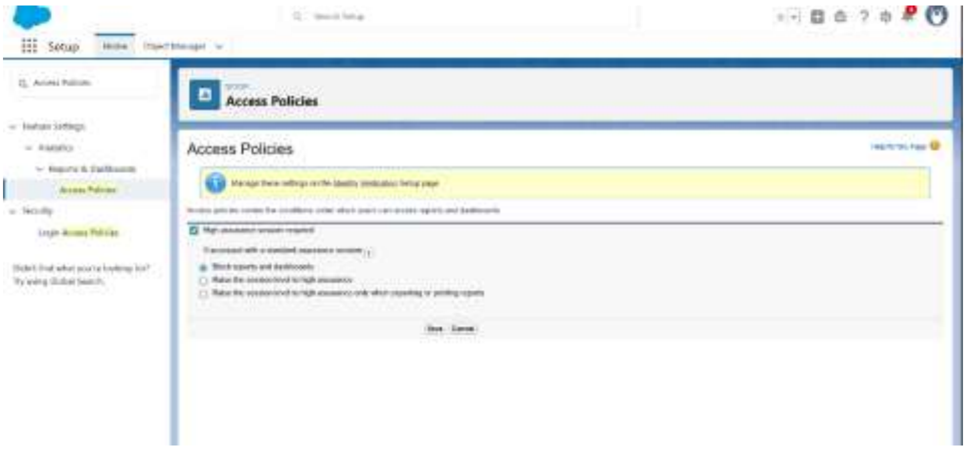
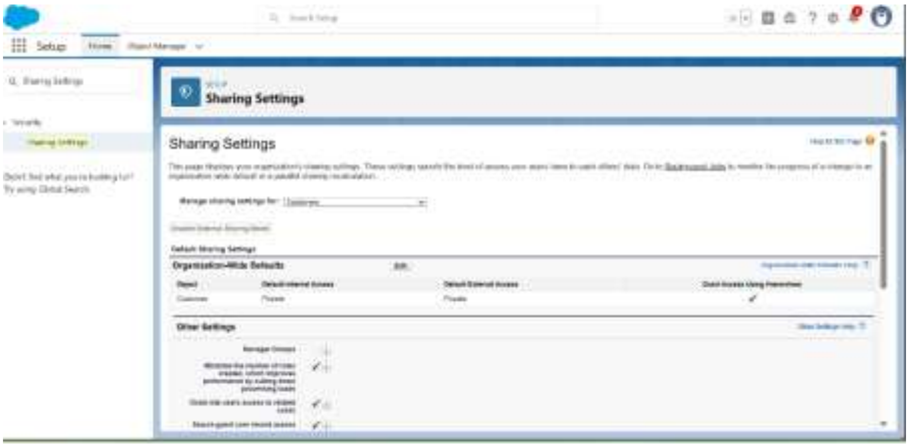
Phase 9: Reporting, Dashboards & Security Review



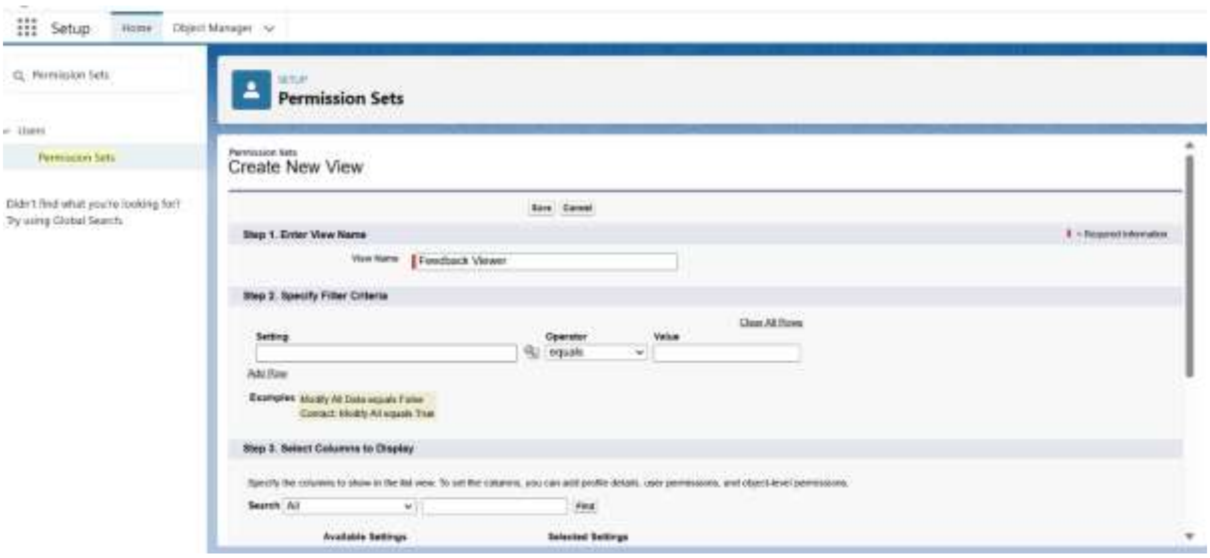
This screenshot shows the Create Report interface in Salesforce, where Vaishnavi has searched for “Loyalty” to generate insights on customer engagement. Three report types are available: *Loyalty Points*, *Loyalty Points with Purchase*, and *Loyalty Points History*. The selected report, *Loyalty Points*, displays a details panel with a green Start Report button, ready to launch the report builder. This setup is ideal for tracking loyalty metrics, analyzing customer behavior, and aligning CRM data with business goals. Perfect for presenting impact-driven insights in stakeholder demos.



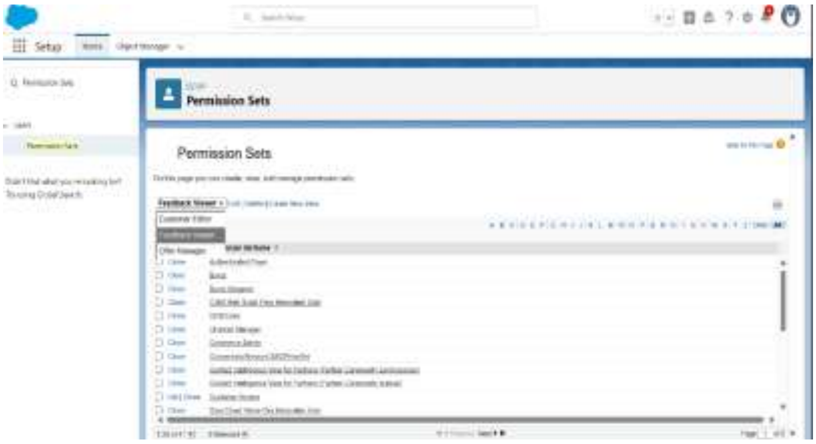
The "Access Policies" section in Salesforce lets you control how securely users interact with reports and dashboards. You can enforce high-assurance sessions for viewing or exporting data, adding an extra layer of protection like MFA. The “Raise session level only when exporting or printing” option balances usability with security—ideal for internal analytics. Blocking exports entirely is best for highly sensitive data. These settings are now managed via the Identity Verification Setup page, streamlining configuration. Use these controls to align access with your organization’s data governance policies.



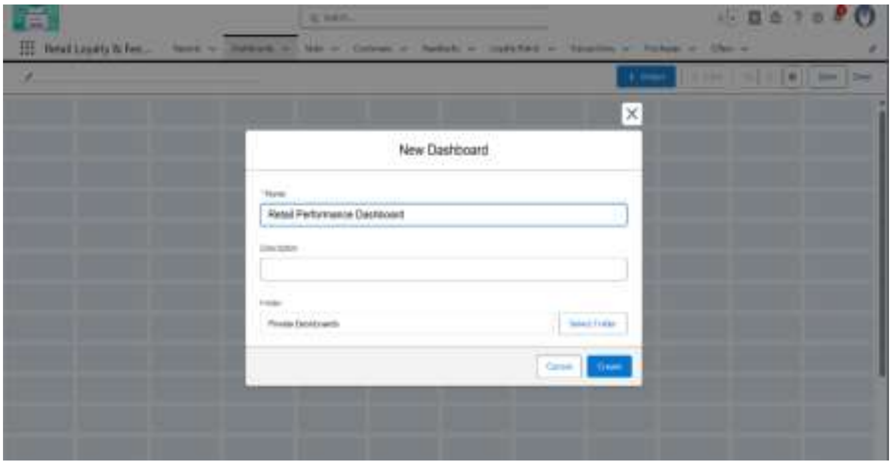
The "Sharing Settings" page in Salesforce lets you define how data is shared across your org. For the "Customer" object, both internal and external access are set to Private, ensuring strict control over visibility. The Grant Access Using Hierarchies checkbox allows managers to view subordinate records, supporting role-based access. Additional options like Manager Groups and Access to records owned by inactive users are enabled, which help maintain continuity in reporting and oversight. These settings are ideal for sensitive customer data, balancing privacy with operational visibility. Use them to align sharing rules with your org’s security and collaboration needs.



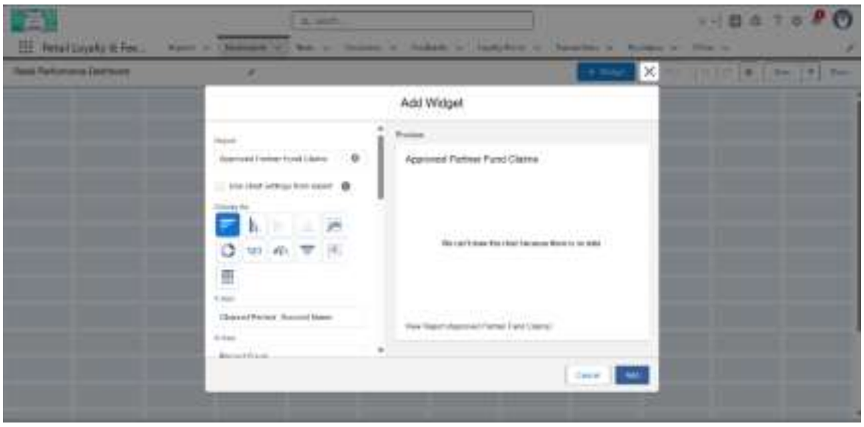
The "Create New View" screen in Salesforce Permission Sets allows you to filter and display specific permission configurations. In this case, the view named "Feedback Viewer" is set to show permission sets where the Setting equals 'View All Data', helping identify users with broad data access. This is useful for auditing or managing feedback-related visibility. The selected columns streamline the view for quick analysis. Creating such targeted views improves clarity when reviewing permission sets and supports better governance over sensitive data access. Ideal for documentation or stakeholder demos focused on access control.



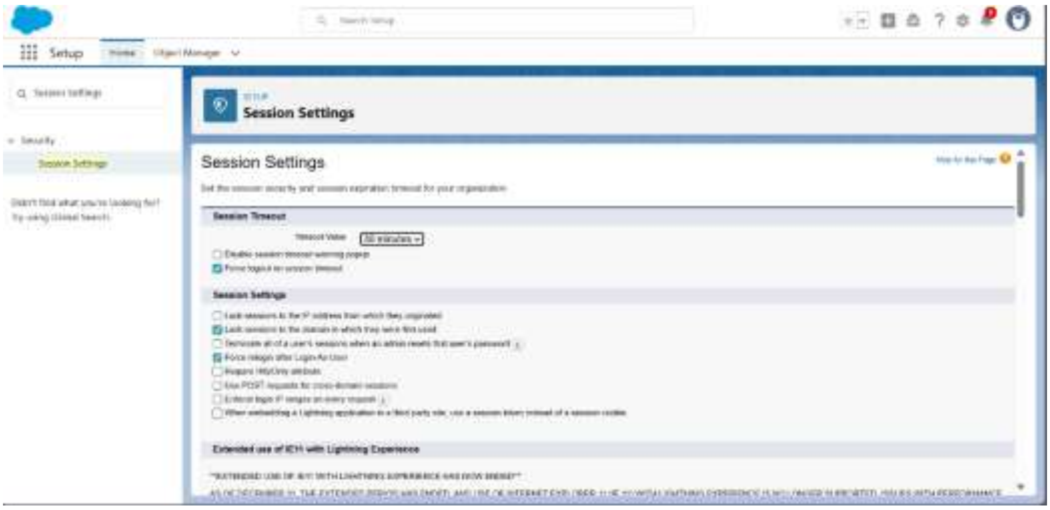
The "Permission Sets" section in Salesforce helps manage user access by assigning specific capabilities. In your setup, the "Facebook Viewer" permission set is selected, alongside others like "Commerce Admin" and "Authenticated Guest User", each tailored for different roles. You can edit, delete, or create filtered views to streamline permission analysis. This interface is especially useful for auditing who has access to sensitive data or features. By organizing permission sets clearly, you ensure compliance and maintain control over user privileges across your org.



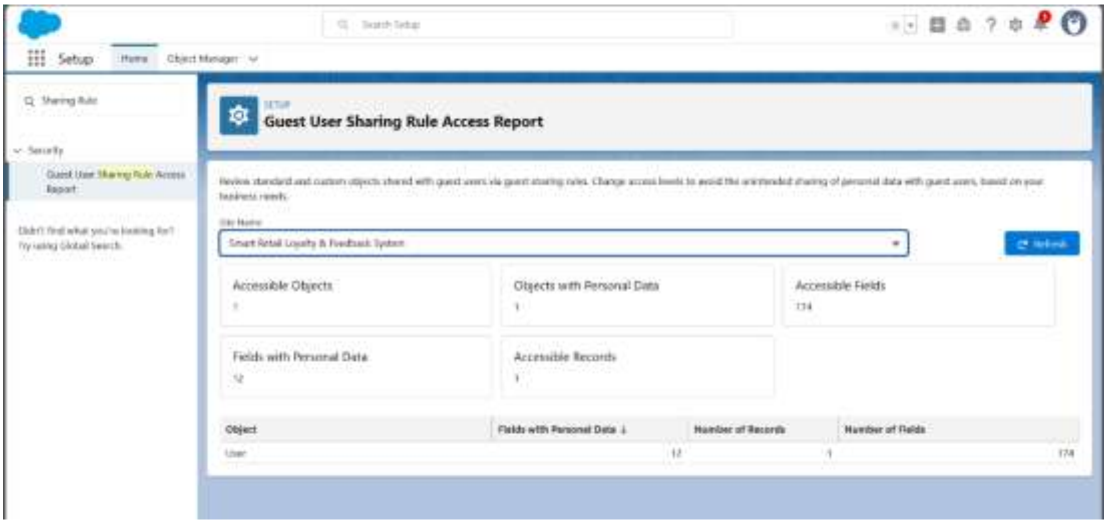
The "Retail Performance Dashboard" setup screen shows you're creating a private dashboard to track key retail metrics. Naming it clearly helps stakeholders quickly identify its purpose. Since it's stored under Private Dashboards, access will be limited unless shared explicitly. You can later move it to a public folder or assign viewing permissions via sharing settings or permission sets. This dashboard will likely pull data from modules like Transactions, Loyalty Points, and Offers, making it ideal for analyzing customer engagement and purchase behavior. Be sure to add a concise description to clarify its scope for future reference.



The widget setup for your Retail Performance Dashboard is targeting the "Approved Partner Fund Claims" report, but the preview shows no data—likely due to missing or filtered records. You're customizing the chart with Channel Partner: Account Name on the Y-axis and Approved Amount on the X-axis, which is ideal for visualizing partner-level fund distribution. The chart type options (bar, pie, donut, etc.) give flexibility once data is available. You might want to verify the report filters or time range to ensure relevant data is included. Once resolved, this widget will offer clear insights into partner fund utilization.



The "Session Settings" page in Salesforce lets you define how long user sessions last and how securely they behave. With a 15-minute timeout and forced logout enabled, your org is prioritizing short, secure sessions to reduce risk. The unchecked popup warning means users won't be alerted before timeout, which can be strict but effective. Additional settings like HTTPS enforcement, domain locking, and session termination on password change further strengthen protection. These configurations are ideal for environments handling sensitive customer or financial data, ensuring compliance and minimizing unauthorized access.



The Guest User Sharing Rule Access Report for your *Smart Retail Loyalty & Feedback System* highlights how guest users interact with data. With 1 object and 3 fields containing personal data exposed, it's crucial to review sharing rules for compliance. The report helps pinpoint which fields are accessible and whether they include sensitive information. Since guest users often access public sites or communities, limiting exposure is key to protecting privacy. Use this report to audit and adjust sharing settings, ensuring only non-sensitive data is shared externally. It's a vital tool for maintaining trust and regulatory alignment.