Phase 9: Reporting, Dashboards & Security Review

Overview

After completing **data management and deployment (Phase 8)**, the focus of Phase 9 was on **turning CRM data into insights** and ensuring **gamer information is protected through security controls**.

This phase had two main goals:

1. Build **reports and dashboards** that allow support agents, marketing teams, and managers to analyze data such as gamer activity, subscription performance, and support cases.

2. Conduct a **security review** to ensure sensitive PlayStation gamer data remains private, while still allowing teams to collaborate effectively.

By the end of this phase, PlayStation CRM became a **decision-making tool**, not just a data repository, while also meeting **security and compliance standards**.

Activities Done

1. Reports

Multiple report types were created to provide insights from different angles:

- **Tabular Report**:
  A simple list showing all **Contacts (Gamers)** who currently have an active subscription. This helps the support team quickly find who is eligible for services.

- **Summary Report** :
  Grouped Subscriptions by **Plan_Type__c** (e.g., Basic, Premium). This gave management a clear view of which subscription tiers are most popular.

- **Matrix Report**:
  Rows = **Games**, Columns = **Regions** → values = total subscriptions or cases. This report highlighted which games were trending in specific regions, guiding marketing campaigns.

☑ Together, these reports connected the CRM's **data model (Phase 3)** with real-world analysis.

---

2. Dashboards

Dashboards were built on top of these reports for visual insights:

- **Subscription Dashboard**:

  o Chart: Subscription Counts by Plan.

  o Chart Game Popularity by Genre.

  o Chart: Subscriptions Expiring Soon.

- **Support Dashboard**:
  - Chart: Open Cases by Status.

- **Dynamic Dashboards**:
  Configured so that managers automatically see **only their team's data**, without having to create separate dashboards for each user.

☑ These dashboards provided **at-a-glance visibility**, ensuring leadership can monitor business health in real time.

---

3. Security Review

To protect sensitive gamer data, several security layers were reviewed and updated:

- **Sharing Settings**:
  - **Contacts (Gamers)** and **Subscriptions** set to **Private** → only record owners and admins can view or edit.
  - **Campaigns** set to **Public Read-Only** → marketing teams can collaborate without editing rights.

- **Field-Level Security**:
  - Sensitive fields such as payment references and discount approvals are only visible to **System Administrators**.
  - Support agents see only the fields they need to assist gamers.

- **Login Security**:
  - Defined **Login IP Ranges** for admin users, ensuring only trusted networks are used for system administration.
  - Adjusted **Session Settings** (timeouts, logout policies) for additional protection.

- **Audit Trail**:
  - Setup Audit Trail enabled to track configuration and user changes.
  - This provides transparency and compliance evidence in case of disputes.

☑ The security review ensured the CRM complies with **data protection principles** while still being usable by day-to-day teams.

PlayStation CRM

Q Search...

Subscriptions ∨ | Games ∨ | Contacts ∨ | Repairs ∨ | Cases ∨ | Campaigns ∨ | Home | * Report Builder ∨ ✕ | * More ∨

Reports
Recent
9 items

Q Search recent reports...   New Report   New Folder   ⚙ ▾

REPORTS	Report Name ∨	Description ∨	Folder ∨	Created By ∨	Created On ∨	Subscribed
Recent	Active Gamers with Subscriptions		Private Reports	Himanshu Kumar	9/25/2025, 3:54 PM	▾
Created by Me	Game Popularity by Genre		Private Reports	Himanshu Kumar	9/25/2025, 4:01 PM	▾
Private Reports	Subscription Counts by Plan		Private Reports	Himanshu Kumar	9/25/2025, 3:57 PM	▾
Public Reports						

PlayStation CRM

Q Search...

Subscriptions ∨ | Games ∨ | Contacts ∨ | Repairs ∨ | Cases ∨ | Campaigns ∨ | Home | * Subscription Dashboard ∨ ✕ | * More ∨

Dashboard
Subscription Dashboard
As of Sep 25, 2025, 4:15 PM · ⓘ ·Viewing as Himanshu Kumar

Refresh | Edit | Subscribe | ▾

Subscription Counts by Plan
Record Count

Plan Type
● Basic
● Premium

5

View Report (Subscription Counts...   As of Sep 25, 2025, 4:15 PM

Game Popularity by Genre

View Report (Game Popularity by ...   As of Sep 25, 2025, 4:15 PM

Subscriptions Expiring Soon
Record Count
0   0.5   1

Status
● Active

Status > End Date
10/11/2... Active   1

View Report (Subscriptions Expiri...   As of Sep 25, 2025, 4:17 PM

History

PlayStation CRM

Q Search...

Subscriptions ∨ | Games ∨ | Contacts ∨ | Repairs ∨ | Cases ∨ | Campaigns ∨ | Home | * Support Dashboard ∨ ✕ | * More ∨

Dashboard
Support Dashboard
As of Sep 25, 2025, 4:16 PM · ⓘ ·Viewing as Himanshu Kumar

Refresh | Edit | Subscribe | ▾

Open Cases by Status
Record Count
0   0.2   0.4   0.6   0.8   1

Status
Working   1

View Report (Open Cases by Stat...   As of Sep 25, 2025, 4:16 PM

History

Setup | Home | Object Manager ∨

🔍 profile

SETUP
Profiles

∨ Users

Profiles

Didn't find what you're looking for?
Try using Global Search.

Profile
System Administrator

Help for this Page ❓

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [1] | Enabled Apex Class Access [7] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] |

Login IP Ranges   [New]

Login IP Ranges Help ❓

Action	IP Start Address	IP End Address	Description
Edit | Del	122.175.200.159	122.175.200.255	

User License	Salesforce	Custom Profile	☐
Created By	salesforce.com, inc., 7/17/2025, 8:08 PM	Modified By	Himanshu Kumar, 9/25/2025, 7:34 AM

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Location Group	Location Group Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]

Setup | Home | Object Manager ∨

🔍 audit

SETUP
View Setup Audit Trail

∨ Security

View Setup Audit Trail

Didn't find what you're looking for?
Try using Global Search.

View Setup Audit Trail

Help for this Page ❓

The last 20 entries for your organization are listed below. You can download your organization's setup audit trail for the last six months (Excel .csv file).

View Setup Audit Trail

Date	User	Source	Namespace Prefix	Action	Section	Delegate User ❓
9/25/2025, 4:29:46 PM PDT	himanshu.kumar.aiml22673@agentforce.com			Changed Session Timeout Value from 120 to 30 minutes	Session Settings	
9/25/2025, 4:29:46 PM PDT	himanshu.kumar.aiml22673@agentforce.com			Session Security Level for Multi-Factor Authentication was set to High Assurance	Session Settings	
9/25/2025, 4:29:46 PM PDT	himanshu.kumar.aiml22673@agentforce.com			Session Security Level for Passwordless Login was set to Standard	Session Settings	
9/25/2025, 4:29:46 PM PDT	himanshu.kumar.aiml22673@agentforce.com			Session Security Level for Lightning Login was set to Standard	Session Settings	
9/25/2025, 4:29:46 PM PDT	himanshu.kumar.aiml22673@agentforce.com			Session Security Level for Activation was set to Standard	Session Settings	
9/25/2025, 4:29:46 PM	himanshu.kumar.aiml22673@agentforce.com			Session Security Level for Delegated Authentication was set to Standard	Session Settings	