# 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**  $\rightarrow$  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.
- 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:

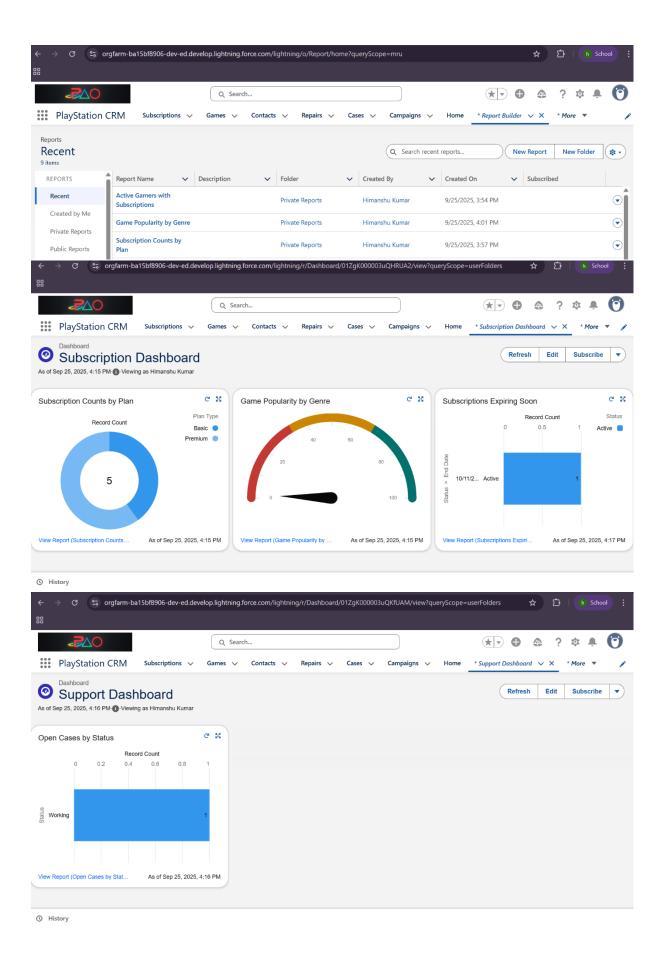
- Sensitive fields such as payment references and discount approvals are only visible to
  System Administrators.
- Support agents see only the fields they need to assist gamers.

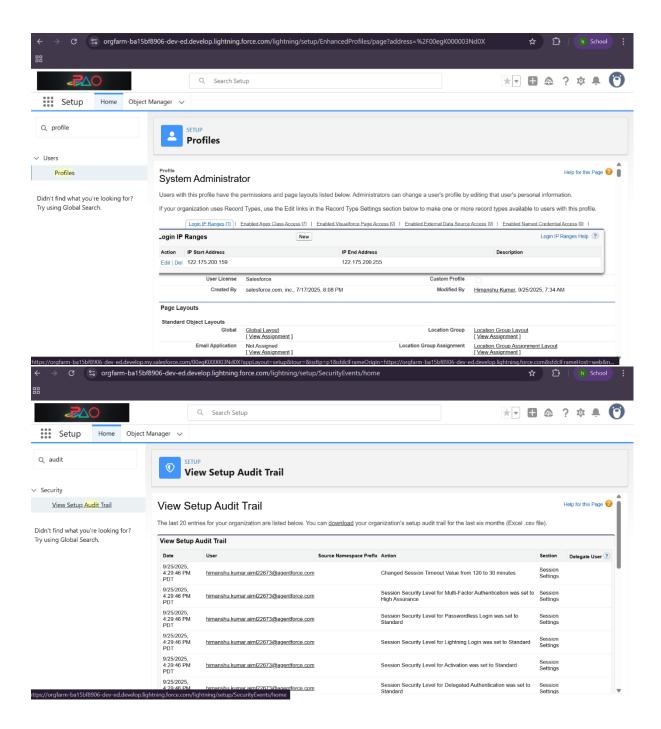
#### Login Security:

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

#### • Audit Trail:

- o 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.





# Phase 10: Final Presentation & Demo Day

#### Overview

This phase focused on **presenting the PlayStation Gaming CRM project** to stakeholders in a clear and structured way. The goal was to showcase the problem addressed, the solution developed, its benefits, and possible future enhancements.

#### 1. Pitch Presentation

# 1.Problem Statement @

- Gamers face difficulties in managing subscriptions, repairs, and support requests.
- PlayStation lacks a centralized CRM system to track gamers, games, and service requests.
- Support agents and marketing teams struggle to get real-time insights into gamer activities.

# 2.Solution 😡

- Built a Salesforce-based PlayStation Gaming CRM to manage:
  - $\circ$  Gamers (Contacts)  $\rightarrow$  Store gamer details.
  - Games & Subscriptions → Track purchases and active plans.
  - Cases & Repairs → Handle gamer issues and service requests.
  - o **Campaigns & Marketing** → Run targeted promotions.
- Added automation (workflows, approvals, flows) to reduce manual effort.
- Created reports & dashboards for actionable insights.
- Ensured data security with role hierarchy, field-level security, and audit trail.

#### 3.Benefits

#### For Gamers:

- Easy tracking of subscriptions and repairs.
- o Faster support through automation.

#### • For Support Team:

- o Automatic case assignment & updates.
- Centralized data access for solving gamer issues.

# For Marketing Team:

- Better campaign targeting using reports.
- Improved engagement insights with dashboards.

#### For Management:

- Secure data visibility with role-based access.
- Real-time performance monitoring.

# 4.Future Enhancements 🔊

- Gamification Features: Reward points and loyalty tracking for gamers.
- Al-Powered Recommendations: Suggest games or subscription upgrades.
- Chatbot Integration: Automated gamer support through Salesforce Einstein Bot.
- Mobile App Access: Extend CRM features to gamers and staff via mobile.
- Third-Party Payment Integration: Enable direct billing and payment tracking.

#### 2. Demo Walkthrough

The demo was structured around a **realistic support and management scenario**:

#### 1. App Launcher & Navigation

- o From the App Launcher, opened PlayStation CRM.
- Navigation bar displayed all required objects: Contacts, Subscriptions, Games, Repairs, Cases, and Campaigns.

#### 2. Gamer Record Page

- o Opened a Contact record (e.g., Alex Johnson).
- o Viewed gamer details in the Highlights Panel.
- o Tabs displayed related Subscriptions, Repairs, and Cases.

#### 3. Subscriptions & Repairs

- o Opened a Subscription record to review fields (Plan Type, Status, Dates).
- o Demonstrated validation rule: End Date must be later than Start Date.
- o Opened a Repair record → attempted to close without cost (error triggered).
- o Entered cost → record successfully closed.

# 4. Reports & Dashboards

- Showed Tabular Report: Active Gamers with Subscriptions.
- Showed Summary Report: Subscriptions grouped by Plan Type.
- Showed Matrix Report: Game popularity by Region.
- Showed Joined Report: Gamers, Subscriptions, and Cases combined.
- Opened Subscription Dashboard (active vs expired subscriptions + new subs in last 30 days).
- Opened Support Dashboard (open vs closed cases + average resolution time).

#### 5. Security Review

- Demonstrated Sharing Settings: Contacts and Subscriptions set to Private, Campaigns set to Public Read-Only.
- o Showed **Field-Level Security**: Sensitive fields hidden from Standard Users.
- Highlighted Login IP Ranges and Audit Trail as additional protections.

Result: The walkthrough demonstrated how agents can serve gamers, how managers can track business metrics, and how security ensures compliance.