

# 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**.

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## 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.

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### 2. Dashboards

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

- **Subscription Dashboard:**
  - Chart: Subscription Counts by Plan.
  - 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.

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### 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.

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PlayStation CRM
Subscriptions
Games
Contacts
Repairs
Cases
Campaigns
Home
**\* Report Builder**
\* More

Reports

Recent

9 items

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						

History

orgfarm-ba15bf8906-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01ZgK000003uQKfUAM/view?queryScope=userFolders

School

PlayStation CRM

Subscriptions

Games

Contacts

Repairs

Cases

Campaigns

Home

\* Support Dashboard

\* More

Search...

Star

+

Refresh

?

Settings

Notifications

Profile

Dashboard

Support Dashboard

As of Sep 25, 2025, 4:16 PM - Viewing as Himanshu Kumar

Refresh

Edit

Subscribe

Open Cases by Status

Record Count

00.20.40.60.801

Status

Working

1

View Report (Open Cases by Stat...

As of Sep 25, 2025, 4:16 PM

<https://orgfarm-ba15bf8906-dev-ed.develop.lightning.force.com/lightning/setup/SecurityEvents/home>

## 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.

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## 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.

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### 2.Solution 💡

- Built a **Salesforce-based PlayStation Gaming CRM** to manage:
  - **Gamers (Contacts)** → Store gamer details.
  - **Games & Subscriptions** → Track purchases and active plans.
  - **Cases & Repairs** → Handle gamer issues and service requests.
  - **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.

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### 3.Benefits ✅

- **For Gamers:**
    - Easy tracking of subscriptions and repairs.
    - Faster support through automation.
  - **For Support Team:**
    - 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.
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#### 4.Future Enhancements

- **Gamification Features:** Reward points and loyalty tracking for gamers.
- **AI-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

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

### 2. Gamer Record Page

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

### 3. Subscriptions & Repairs

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