

MACK Stores Salesforce CRM Project

Phase 9: Reporting, Dashboards & Security Review

Objective:

To provide actionable insights into sales, inventory, and customer data while ensuring the CRM system remains secure, compliant, and reliable. This phase focuses on designing advanced reports and dashboards for decision-making and reviewing security configurations such as sharing, field-level restrictions, login controls, and audit trails.

1. Reports (Tabular, Summary, Matrix, Joined)

Steps:

- Created **Tabular Report**: Product stock levels for real-time monitoring.
- Designed **Summary Report**: Total Sales grouped by Region and Retail Manager.
- Built **Matrix Report**: Sales by Product vs Month (rows = products, columns = months).
- Implemented **Joined Report**: Combined Sales Orders with Loyalty Program redemptions to track repeat customers.

Report: Products with Inventory
Products Report

Total Records: 22 Total Price: USD 63.82 Total Stock: 3,180

	Product Name	Product ID	Price	Stock	Category
1	PROD-0001	a00gL00000KNPGm	USD 6.99	75	Grocery
2	PROD-0002	a00gL00000KNPGn	USD 1.99	140	Grocery
3	PROD-0003	a00gL00000KNPGo	USD 2.49	110	Beverages
4	PROD-0004	a00gL00000KNPGp	USD 1.25	300	Beverages
5	PROD-0005	a00gL00000KNPGq	USD 9.99	85	Beverages
6	PROD-0006	a00gL00000KNPGr	USD 3.49	120	Beverages
7	PROD-0007	a00gL00000KNPGs	USD 1.99	220	Beverages
8	PROD-0008	a00gL00000KNPGt	USD 3.25	100	Beverages
9	PROD-0009	a00gL00000KNPGu	USD 2.49	180	Beverages
10	PROD-0010	a00gL00000KNPGv	USD 3.49	130	Beverages
11	PROD-0011	a00gL00000KNPGw	USD 2.49	130	Beverages
12	PROD-0012	a00gL00000KPVYG	USD 6.99	75	Grocery
13	PROD-0013	a00gL00000KPVYH	USD 1.99	140	Grocery
14	PROD-0014	a00gL00000KPVYI	USD 2.49	110	Beverages
15	PROD-0015	a00gL00000KPVYJ	USD 1.25	300	Beverages
16	PROD-0016	a00gL00000KPVYK	USD 9.99	85	Beverages
17	PROD-0017	a00gL00000KPVYL	USD 3.49	120	Beverages
18	PROD-0018	a00gL00000KPVYM	USD 1.99	220	Beverages
19	PROD-0019	a00gL00000KPVYN	USD 3.25	100	Beverages
20	PROD-0020	a00gL00000KPVYO	USD 2.49	180	Beverages
21	PROD-0021	a00gL00000KPVYP	USD 3.49	130	Beverages

To Do List

Benefits: Custom reports allow leadership to evaluate revenue trends, stock health, and customer behavior.

2. Report Types

Steps:

- Defined **Custom Report Types** for:
 - Sales Orders with Products
 - Loyalty Program Members with Transactions
- Enabled admins to extend reporting beyond standard Salesforce objects.

Setup

Home

Object Manager

Search Setup

Quick Find

Setup Home

Salesforce Go

Service Setup Assistant

Commerce Setup Assistant

Field Service Setup Home (Beta)

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Subscription Management

> Apps

> Feature Settings

> Analytics

> Apps

> Reports & Dashboards

Access Policies

Historical Trending

Custom Report Types

Sale Orders with Line Items

Preview Layout

Edit Layout

Clone

Delete

Close

Below is the information for this custom report type. You can click the buttons on this to preview or update information for the custom report type

Details

Display Label

Sale Orders with Line Items

API Name

Sale_Orders_with_Line_Items

Description

Reports on Sales Orders and their related Order Line Items including product, quantity, and totals.

Created By

Abdulla Shaik Mahammad, 26/09/25, 10:35 am

Store in Category

other

Deployment Stat...

Deployed

Modified By

Abdulla Shaik Mahammad, 26/09/25, 10:35 am

Fields

Source Object	Included Fields
Sale Orders	15
Order Line Items	12

Object Relationships

Sale Orders (A)

with at least one related record from Order Line Items (B)

A

B

A

B

Custom Report Types

Customers with Sale Orders and Loyalty

Preview Layout

Edit Layout

Clone

Delete

Close

Below is the information for this custom report type. You can click the buttons on this to preview or update information for the custom report type

Details

Display Label

Customers with Sale Orders and Loyalty

API Name

Customers_with_Sale_Orders_and_Loyalty

Description

Reports on Customers along with their Sales Orders and Loyalty Program details.

Created By

Abdulla Shaik Mahammad, 26/09/2025, 10:39 am

Store in Category

other

Deployment Status

Deployed

Modified By

Abdulla Shaik Mahammad, 26/09/2025, 10:39 am

Fields

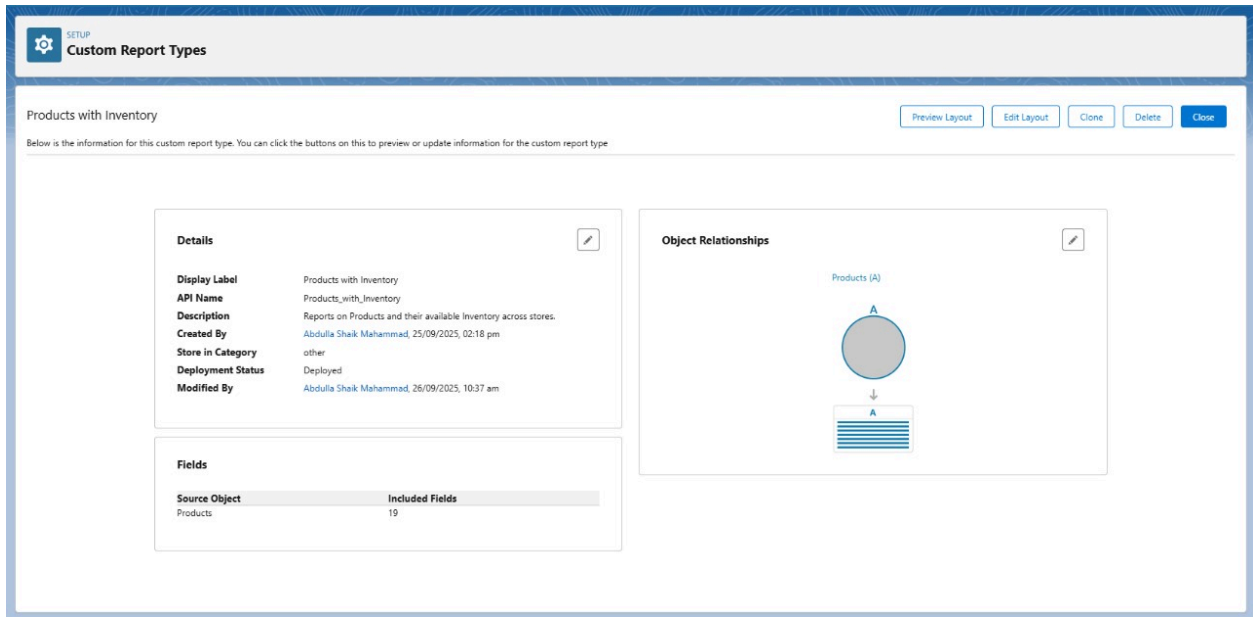
Source Object	Included Fields
Customers	9

Object Relationships

Customers (A)

A

A



Benefits: Flexibility to create tailored reports matching MACK Stores' business model.

3. Dashboards

Steps:

- Created **Executive Dashboard**:
 - Sales Revenue (by month, by product)
 - Inventory Status (low-stock alerts)
 - Customer Loyalty Redemptions
- Built **Operations Dashboard** for Retail Managers with store-wise performance.

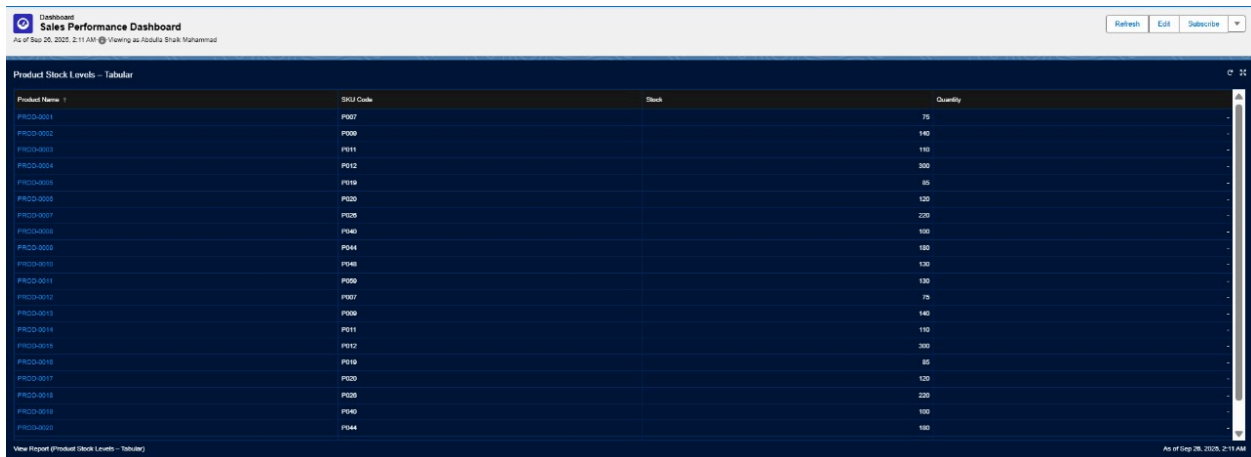
Product Name	Product ID	Price	Stock	Category
PROD-0001	af09j_000000Hf0m	USD 8.99	75	Grocery
PROD-0002	af09j_000000Hf0n	USD 1.99	140	Grocery
PROD-0003	af09j_000000Hf0o	USD 2.49	110	Beverages
PROD-0004	af09j_000000Hf0p	USD 1.25	300	Beverages
PROD-0005	af09j_000000Hf0q	USD 6.99	85	Beverages
PROD-0006	af09j_000000Hf0r	USD 3.49	120	Beverages
PROD-0007	af09j_000000Hf0s	USD 1.99	220	Beverages
PROD-0008	af09j_000000Hf0t	USD 3.25	100	Beverages
PROD-0009	af09j_000000Hf0u	USD 2.49	180	Beverages
PROD-0010	af09j_000000Hf0v	USD 3.49	130	Beverages
PROD-0011	af09j_000000Hf0w	USD 2.49	130	Beverages
PROD-0012	af09j_000000Hf0x	USD 8.99	75	Grocery
PROD-0013	af09j_000000Hf0y	USD 1.99	140	Grocery
PROD-0014	af09j_000000Hf10	USD 2.49	110	Beverages
PROD-0015	af09j_000000Hf11	USD 1.25	300	Beverages
PROD-0016	af09j_000000Hf12	USD 6.99	85	Beverages
PROD-0017	af09j_000000Hf13	USD 3.49	120	Beverages
PROD-0018	af09j_000000Hf14	USD 1.99	220	Beverages
PROD-0019	af09j_000000Hf15	USD 3.25	100	Beverages
PROD-0020	af09j_000000Hf16	USD 2.49	180	Beverages
PROD-0021	af09j_000000Hf17	USD 3.49	130	Beverages
PROD-0022	af09j_000000Hf18	USD 2.49	130	Beverages

Benefits: Single-screen visibility into KPIs and trends.

4. Dynamic Dashboards

Steps:

- Configured dashboards to display **user-specific data** (e.g., Retail Manager only sees their store's sales).
- Limited number of dynamic dashboards to licensed capacity.



Sales Performance Dashboard
As of Sep 26, 2025, 2:11 AM @ viewing as Abdul Shakh Mohammad

Refresh Edit Subscribe

Product Stock Levels - Tabular

Product Name	SKU Code	Stock	Quantity
PROD-0001	PS07		75
PROD-0002	PS09		140
PROD-0003	PS11		150
PROD-0004	PS12		300
PROD-0005	PS19		85
PROD-0006	PS20		120
PROD-0007	PS25		220
PROD-0008	PS40		100
PROD-0009	PS44		100
PROD-0010	PS46		120
PROD-0011	PS59		130
PROD-0012	PS67		75
PROD-0013	PS69		140
PROD-0014	PS11		150
PROD-0015	PS12		300
PROD-0016	PS19		85
PROD-0017	PS20		120
PROD-0018	PS25		220
PROD-0019	PS40		100
PROD-0020	PS44		100

View Report (Product Stock Levels - Tabular) As of Sep 26, 2025, 2:11 AM

Benefits: Role-based visibility without duplicating dashboards.

5. Sharing Settings

Steps:

- Configured **Organization-Wide Defaults (OWD)**:
 - Sales Orders = Private
 - Products = Public Read-Only
- Created **Sharing Rules**: Retail Managers can see Orders of their team.
- Used **Manual Sharing** for exceptional cases.

Sharing Settings

Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Inventory	Public Read/Write	Private	✓
Loyalty Program	Public Read/Write	Private	✓
Order Line Item	Controlled by Parent	Controlled by Parent	
Product	Public Read/Write	Public Read/Write	✓
Relief Case	Public Read/Write	Private	✓
Sale Order	Private	Private	✓

Other Settings

Manager Groups ☐ [1]

Secure guest user record access ☒ [1]

Require permission to view record names in lookup fields ☐ [1]

Sharing Rules

Lead Sharing Rules [New](#) [Recalculate](#) [Lead Sharing Rules Help](#)

Benefits: Ensures correct access control and prevents data leakage.

6. Field-Level Security (FLS)

Steps:

- Configured FLS so sensitive fields (e.g., Customer Email, Loyalty Points Balance) are hidden for non-admin profiles.
- Applied FLS on both standard and custom fields.

Benefits: Compliance with data privacy and regulatory standards.

7. Session Settings

Steps:

- Reduced **session timeout** to 2 hours.
- Enabled **Login-As user session logging**.
- Implemented **Require secure connections (HTTPS)**.

Session Settings

Set the session security and session expiration timeout for your organization.

Session Timeout

Timeout Value: 2 hours

☐ Disable session timeout warning popup

☒ Force logout on session timeout

Session Settings

☐ Lock sessions to the IP address from which they originated

☒ Lock sessions to the domain in which they were first used

☐ Terminate all of a user's sessions when an admin resets that user's password

☒ Force relogin after Login-As-User

☐ Require HttpOnly attribute

☐ Use POST requests for cross-domain sessions

☐ Enforce login IP ranges on every request

☐ When embedding a Lightning application in a third-party site, use a session token instead of a session cookie.

Extended use of IE11 with Lightning Experience

EXTENDED USE OF IE11 WITH LIGHTNING EXPERIENCE HAS NOW ENDED

AS OF DECEMBER 31, THE EXTENDED PERIOD HAS ENDED, AND USE OF INTERNET EXPLORER 11 (IE 11) WITH LIGHTNING EXPERIENCE IS NO LONGER SUPPORTED. ISSUES WITH PERFORMANCE OR FUNCTIONALITY THAT AFFECT ONLY IE 11 WILL NOT BE FIXED. PLEASE SWITCH TO A SUPPORTED BROWSER.

Caching

☒ Enable caching and autocomplete on login page

☒ Enable secure and persistent browser caching to improve performance

☒ Enable user switching

☐ Remember me until logout

☒ Enable Content Delivery Network (CDN) for Lightning Component framework

Identity Verification

[Manage these settings on the Identity Verification Setup page.](#)

Benefits: Minimizes risk of unauthorized or prolonged access.

8. Login IP Ranges

Steps:

- Restricted system administrators to company's corporate IP range.
- Allowed Retail Managers to log in from store networks only.
- Blocked suspicious/unregistered IPs automatically.

Benefits: Prevents unauthorized logins from external locations.

9. Audit Trail

Steps:

- Enabled **Setup Audit Trail** to log all admin configuration changes.
- Downloaded monthly audit reports for governance.
- Combined with **Field History Tracking** on Orders and Products.

SETUP

View Setup Audit Trail

View Setup Audit Trail

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, 11:33:36 PM PDT	22ht1a6150357@agentforce.com		Finished Organization-Wide Defaults update	Sharing Defaults	
9/25/2025, 11:33:31 PM PDT	22ht1a6150357@agentforce.com		Changed default external access for Product from Private to Public Read/Write	Sharing Defaults	
9/25/2025, 11:33:29 PM PDT	22ht1a6150357@agentforce.com		Changed default internal access for Sale Order from Public Read/Write to Private	Sharing Defaults	
9/25/2025, 11:33:12 PM PDT	22ht1a6150357@agentforce.com		Started default external access update for Sale Order from Public Read/Write to Private	Sharing Defaults	
9/25/2025, 11:33:12 PM PDT	22ht1a6150357@agentforce.com		Started default external access update for Product from Private to Public Read/Write	Sharing Defaults	
9/25/2025, 11:33:10 PM PDT	22ht1a6150357@agentforce.com		Started Organization-Wide Defaults update	Sharing Defaults	
9/25/2025, 11:14:03 PM PDT	22ht1a6150357@agentforce.com		Changed Product Trigger code: ProductTrigger	Apex Trigger	
9/25/2025, 11:14:02 PM PDT	22ht1a6150357@agentforce.com		Changed ReliefCaseController Apex Class code	Apex Class	
9/25/2025, 11:14:02 PM PDT	22ht1a6150357@agentforce.com		Changed ProductTriggerTest Apex Class code	Apex Class	
9/25/2025, 11:14:02 PM PDT	22ht1a6150357@agentforce.com		Changed ProductTriggerHandler Apex Class code	Apex Class	
9/25/2025, 11:14:02 PM PDT	22ht1a6150357@agentforce.com		Changed ProductSyncBatch Apex Class code	Apex Class	
9/25/2025, 11:14:02 PM PDT	22ht1a6150357@agentforce.com		Changed ProductService Apex Class code	Apex Class	
9/25/2025, 11:14:02 PM PDT	22ht1a6150357@agentforce.com		Changed reliefCaseIntakeForm Lightning Web Component	Lightning Components	
9/25/2025, 11:14:02 PM PDT	22ht1a6150357@agentforce.com		Changed InventoryDashboard Lightning Web Component	Lightning Components	
9/25/2025, 11:14:02 PM PDT	22ht1a6150357@agentforce.com		Changed discountCalculator Lightning Web Component	Lightning Components	
9/25/2025, 11:10:33 PM PDT	22ht1a6150357@agentforce.com		Changed Product Trigger code: ProductTrigger	Apex Trigger	
9/25/2025, 11:10:32 PM PDT	22ht1a6150357@agentforce.com		Changed ReliefCaseController Apex Class code	Apex Class	
9/25/2025, 11:10:32 PM PDT	22ht1a6150357@agentforce.com		Changed ProductTriggerTest Apex Class code	Apex Class	
9/25/2025, 11:10:32 PM PDT	22ht1a6150357@agentforce.com		Changed ProductTriggerHandler Apex Class code	Apex Class	
9/25/2025, 11:10:32 PM PDT	22ht1a6150357@agentforce.com		Changed ProductSyncBatch Apex Class code	Apex Class	

Download setup audit trail for last six months (Excel .csv file)

Benefits: Full transparency and traceability for compliance audits.

Outcome of Phase 9

- Reports and dashboards deliver real-time, role-specific insights for business leaders and store managers.
- Security policies (sharing, FLS, session control, IP ranges) protect sensitive data from misuse.
- Audit trail and history tracking ensure accountability and compliance with regulatory standards.
- MACK Stores CRM is now equipped with **data-driven intelligence** while maintaining **enterprise-grade security**.