Phase 9 Report: Reporting, Dashboards & Security Review

Project: Return Flow – Efficient Reverse Logistics and Return Management System

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1. Introduction

This phase focuses on enhancing operational visibility and data security for the Return Flow system. By implementing comprehensive reports, dashboards, and security measures, the organization can monitor return workflows, analyze customer satisfaction, and ensure compliance with data protection policies.

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2. Reports

Objective: To track key metrics related to returns, refunds, and inspection results for informed decision-making.

Reports Created:

1. **Return Volume by Product Category**

   o **Purpose:** Monitor the distribution of returns across different product categories.

   o **Key Metrics:** Number of returns per category, trends over time.

   o **Usage:** Helps identify products with high return rates for quality improvements or policy adjustments.
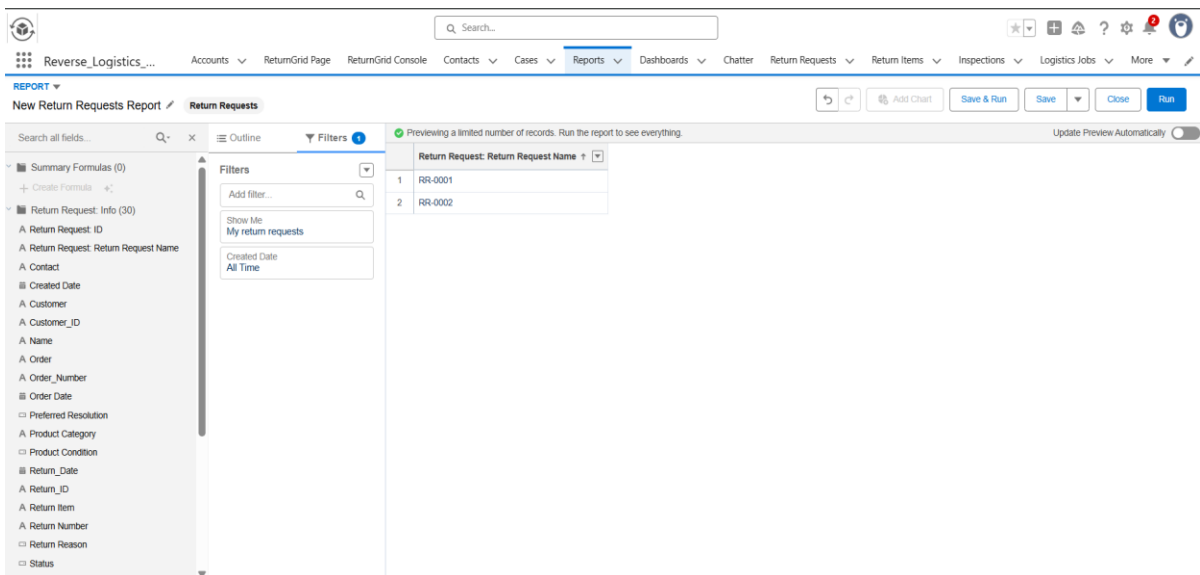
3. Dashboards

Objective: Provide a 360° view of return workflows, customer satisfaction, and operational bottlenecks.

Dashboard Features:

- **Components:** tables.

- **Metrics Visualized:**

    o Return volumes by category

- **Outcome:** A comprehensive dashboard available to management and operational teams for real-time insights.
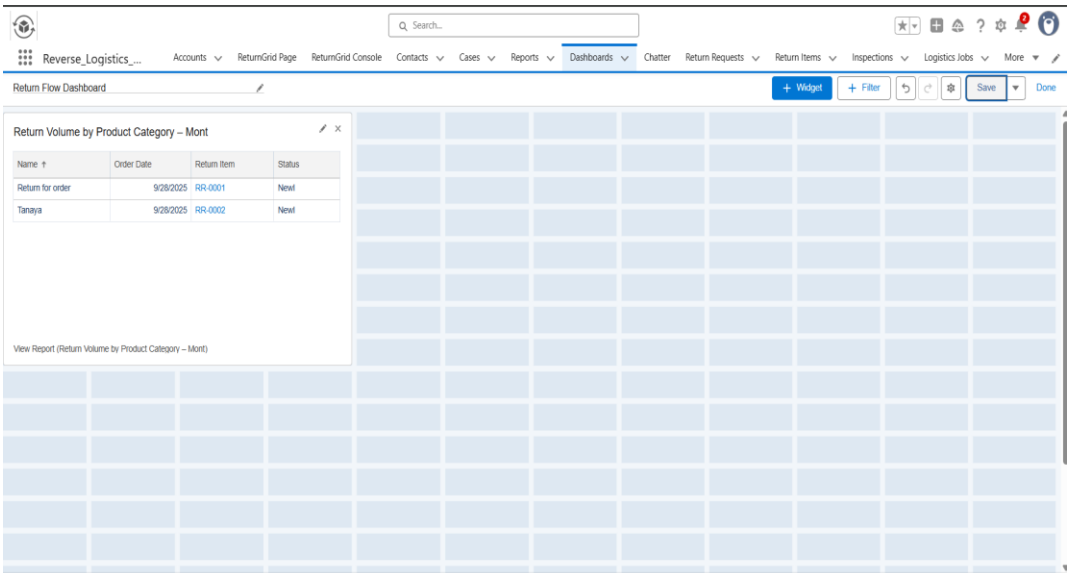
4. Security Review

Objective: Ensure data privacy, compliance, and controlled access to sensitive information.

Key Actions:

1. **Field-Level Security (FLS)**

    o Restricted access to sensitive fields such as customer personal information and refund amounts.

o   Verified visibility for different profiles to prevent unauthorized access.

2. **Login IP Ranges**

   o   Configured IP restrictions for profiles to limit access to approved networks.

   o   Prevented external unauthorized logins.

3. **Audit Trail**

   o   Enabled tracking of changes in return, refund, and inspection records.

   o   Monitored user activity for compliance and accountability.

5. Validation & Testing

- Reports and dashboards were verified against actual data to ensure accuracy.

- Security measures were tested by logging in with different profiles and from different IP ranges.

- Audit trail logs confirmed proper tracking of changes.

6. Deliverables

- **Reports:**

  1. Return Volume by Product Category

- **Dashboard:** 360° Return Workflow & Customer Metrics

- **Security Documentation:** Field-level security, login IP ranges, and audit trail setup.

7. Conclusion

Phase 9 ensures that the Return Flow system provides actionable insights while maintaining high standards of data security and compliance. The reports, dashboards, and security measures enable operational efficiency, transparency, and informed decision-making across all return management processes.