

Phase 9 Report: Reporting, Dashboards & Security Review

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

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.

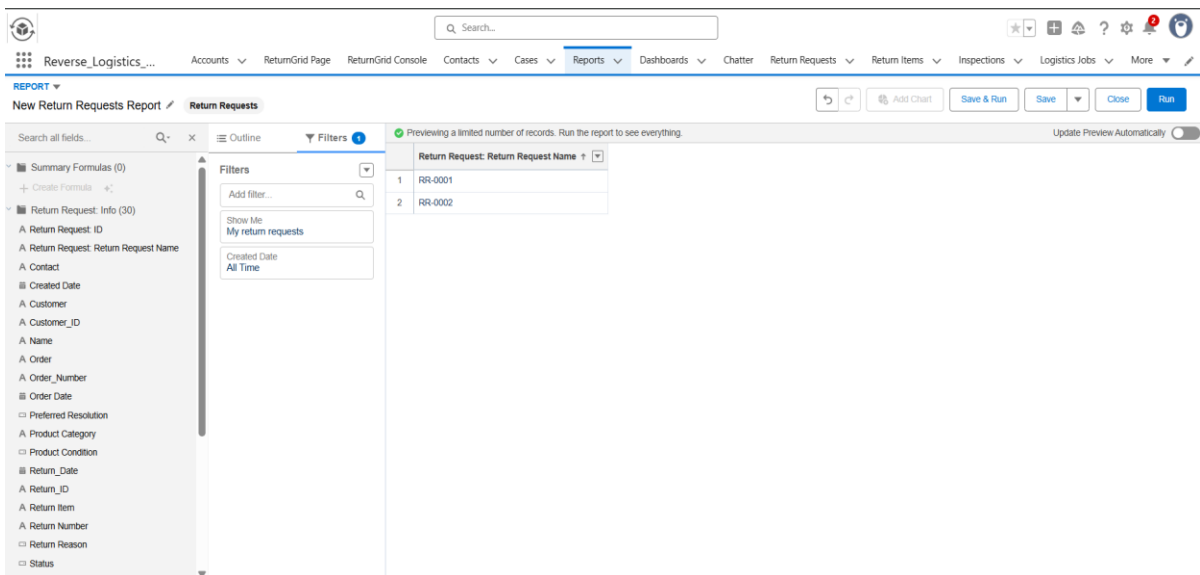
2. Reports

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

Reports Created:

1. Return Volume by Product Category

- **Purpose:** Monitor the distribution of returns across different product categories.
- **Key Metrics:** Number of returns per category, trends over time.
- **Usage:** Helps identify products with high return rates for quality improvements or policy adjustments.

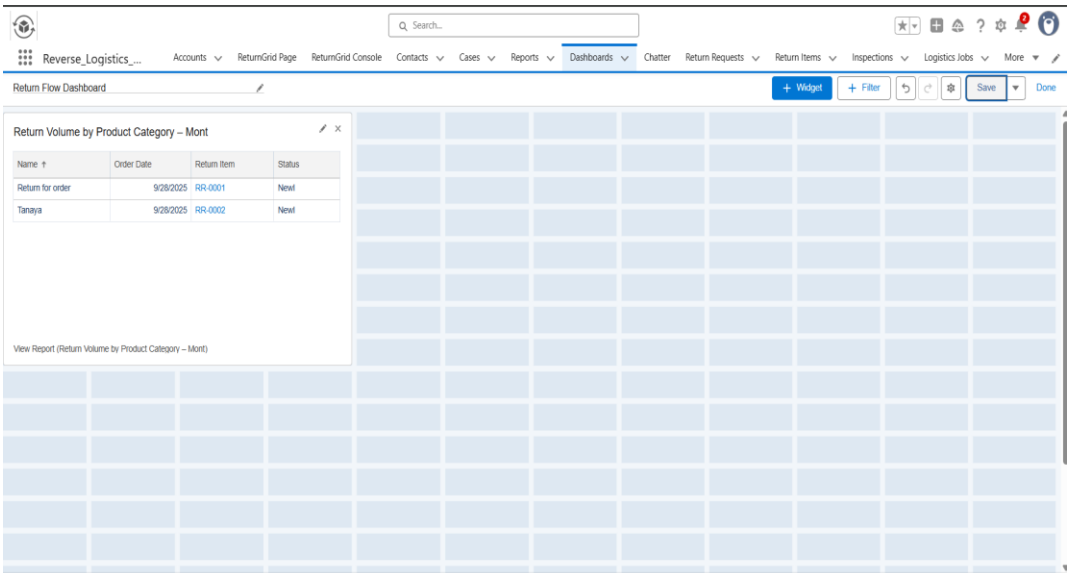


3. Dashboards

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

Dashboard Features:

- **Components:** tables.
- **Metrics Visualized:**
 - 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)**
 - Restricted access to sensitive fields such as customer personal information and refund amounts.

- Verified visibility for different profiles to prevent unauthorized access.

2. Login IP Ranges

- Configured IP restrictions for profiles to limit access to approved networks.
- Prevented external unauthorized logins.

3. Audit Trail

- Enabled tracking of changes in return, refund, and inspection records.
- Monitored user activity for compliance and accountability.

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The top navigation bar includes a 'SETUP' icon and the 'Profiles' title. Below the title, there are several configuration sections:

- Password Policies:** Includes checkboxes for 'Require a minimum 1 day password lifetime' and 'Don't immediately expire links in forgot password emails'. Below these are buttons for 'Edit', 'Clone', and 'View Users'.
- Login Hours:** A section with an 'Edit' button and a 'Login Hours Help' link. The current status is 'No login hours specified'.
- Login IP Ranges:** A section with a 'New' button and a 'Login IP Ranges Help' link. Below this is a table with columns for 'Action', 'IP Start Address', 'IP End Address', and 'Description'. The table contains one entry with '47.11.5.132' in both the start and end address fields.
- Enabled Apex Class Access:** A section with an 'Edit' button and an 'Enabled Apex Class Access Help' link. Below this is a table with columns for 'Apex Class Name' and 'AppExchange Package Name'. The table contains two entries: 'devedapp_DeveloperEditionUtils' and 'devedapp_PostInstallScript'.

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.

Reverse_Logistics_...

Accounts

ReturnGrid Page

ReturnGrid Console

Contacts

Cases

Reports

Dashboards

Chatter

Return Requests

Return Items

Inspections

Logistics Jobs

More

Q Search...

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Report: Return Requests with Return Items

Return Volume by Product Category – Mont

Enable Field Editing

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Add Chart

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Edit

▼

Total Records
2

	Return Item	Name	Return Reason	Return Number
1	RR-0001	Return for order	Damaged	RN-0001
2	RR-0002	Tanaya	Damaged	-

⚡ Report Chart 🗣️ Omni-Channel

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.