

V-Electronics: Revolutionizing Smart Device Management

Phase 9: Reporting, Dashboards & Security Review

Decision-making at V-Electronics required powerful analytics and strict data security. This phase ensured that reports and dashboards provided actionable insights while Salesforce's security model safeguarded sensitive information.

1. Introduction

Salesforce's native reporting tools enable both real-time and historical analysis. Coupled with field-level security and audit features, the platform became a **trusted source of truth**.

2. Objectives

- To provide sales agents and managers with actionable insights.
 - To enforce field-level and role-based security.
 - To monitor system usage and compliance.
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3. Detailed Description of Contents

Reports

- Built **Tabular Reports** for quick lists (e.g., daily orders).
- **Summary Reports** to group sales by region.
- **Matrix Reports** to analyze product-category vs. region.
- **Joined Reports** to combine customer and order data.

Report Types

- Created custom report types for Orders-Products relationships.

Dashboards

- Built interactive dashboards for management.
- KPIs: Sales by Product Line, Revenue by Region, Top Customers.

Dynamic Dashboards

- Configured dashboards to reflect user role-specific data.

Sharing Settings & Field Level Security

- Restricted access to sensitive fields like payment details.
- Role hierarchy applied for regional visibility.

Object	Default Internal Access	Default External Access	Guest Access Using Hierarchies
Lead	Public ReadWrite/Transfer	Private	✓
Account and Contact	Public ReadWrite	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
User	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public ReadWrite	Private	✓
Case	Public ReadWrite/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	User	User	✓
Product	Public ReadWrite	Public ReadWrite	✓
Individual	Public ReadWrite	Private	✓
Voice Call	Private	Private	✓
Activation Target	Private	Private	✓

Session Settings & Login IP Ranges

- Configured IP restrictions for admins.
- Applied login hours for sales reps.



Audit Trail

- Monitored setup changes and user activity logs.

4. Deliverables

- Reports and dashboards for strategic insights.
- Strong field-level and object-level security.
- Audit trail for compliance.

5. Conclusion

Phase 9 delivered **data-driven insights** while ensuring **enterprise-grade security controls** for V-Electronics.