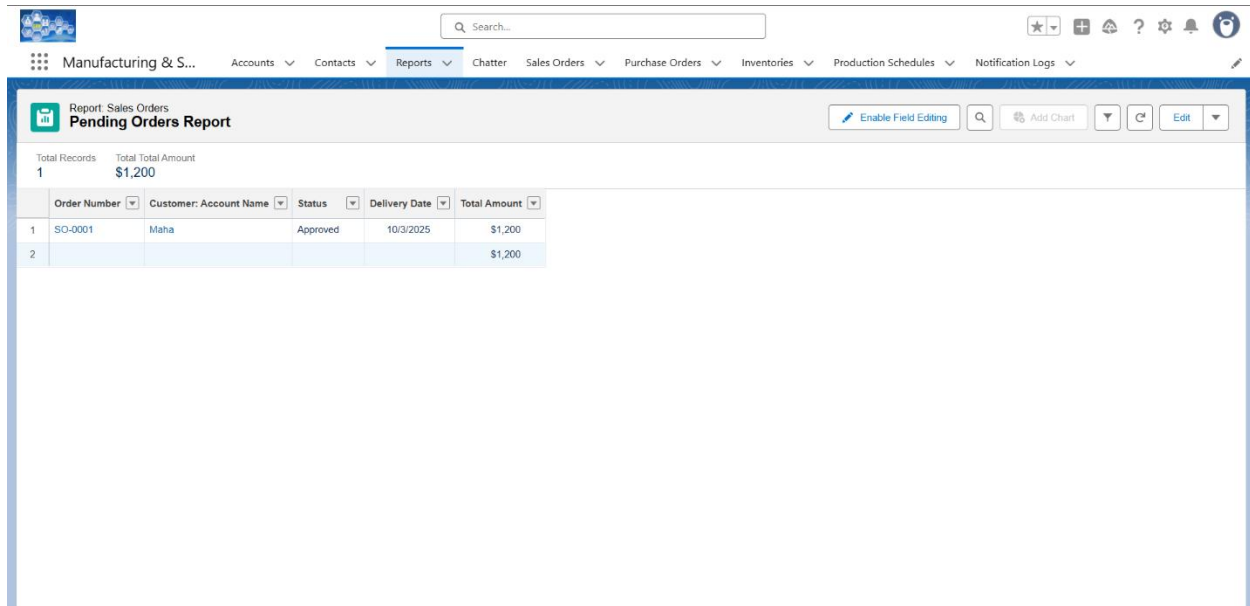


PHASE 9: DASHBOARDS AND REPORTS

Name: Alekhya Nam

Step 1: Reports Creation - Designed custom reports for Orders, Customers, and Production Schedules. - Reports include metrics such as: - Total Orders - Orders by Status - Customer Segments - Production Schedule Status



The screenshot shows a Salesforce report interface. At the top, there's a navigation bar with tabs for Manufacturing & S..., Accounts, Contacts, Reports (selected), Chatter, Sales Orders, Purchase Orders, Inventories, Production Schedules, and Notification Logs. A search bar is also present. Below the navigation bar, the report title 'Report: Sales Orders Pending Orders Report' is displayed. To the right of the title are buttons for 'Enable Field Editing', 'Add Chart', and 'Edit'. Below the title, the report summary shows 'Total Records: 1' and 'Total Total Amount: \$1,200'. The main content area contains a table with the following data:

	Order Number	Customer: Account Name	Status	Delivery Date	Total Amount
1	SO-0001	Maha	Approved	10/3/2025	\$1,200
2					\$1,200

Step 2: Dashboards Design - Built interactive dashboards to visualize the report data. - Dashboards include charts, tables, and key performance indicators (KPIs). - Added filters for dynamic data analysis, e.g., date range, production line, customer segment.

Monthly Orders Analysis | Sales

orgfarm-f498a3fd9-dev-ed.develop.lightning.force.com/one/app#eyJjb21wb25lbnREZWY0a2kZXRndG9wRGZaGjVhYXkczpkYXNoYm9hcmQlCjdhbRyaWJ1dGVzZjlp7mRhc2hib2FyZElkji...

Search...

Manufacturing & S... Accounts Reports Chatter Sales Orders Purchase Orders Inventories Production Schedules Notification Logs Dashboards

Monthly Orders Analysis

+ Widget + Filter Save Done

Pending Orders Report

Order Number	Customer Account Name	Status	Delivery Date	Total Amount
SO-0001	Maha	Approved	10/3/2025	\$1k

View Report (Pending Orders Report)

Delivered Orders Report

Delivery Date	Sum of Total Amount	Record Count
10/3/2025	\$1k	1

View Report (Delivered Orders Report)

Step 3: Filters and Interactivity - Added filters to allow dynamic exploration of data. - Users can select different time periods, production lines, or customer segments. - All dashboard components respond dynamically to filter changes.

Add Filter

* Select Field to Filter By (Required)

Order Date

2 equivalent fields ⓘ

Display Name

Order Date

Filter Values (0)

1 [New Filter Value](#)

[Add Filter Value](#)

Operator

equals ▼

Date Type

☒ Calendar ☐ Relative

Value

9/26/2025 📅

[Add More Date](#)

Display Text

9/26/2025

[Cancel](#) [Apply](#)

Step 5: Saving and Sharing - Dashboard saved in a shared folder for team access. - Permissions set to allow team members to view and interact with the dashboard. - Ensured that reports feeding the dashboard are scheduled for regular updates.

Tools & Technologies Used

- Salesforce Reports & Dashboards – Visualization and analytics
- Profiles & Permission Sets – Security configuration
- Remote Site Settings – Secure API access
- Lightning App Builder – Dashboard placement and layout