problem statement : “ CPQ & Order Visibility Hub for Industrial Manufacturing”

Phase9: Reporting, & Security Review

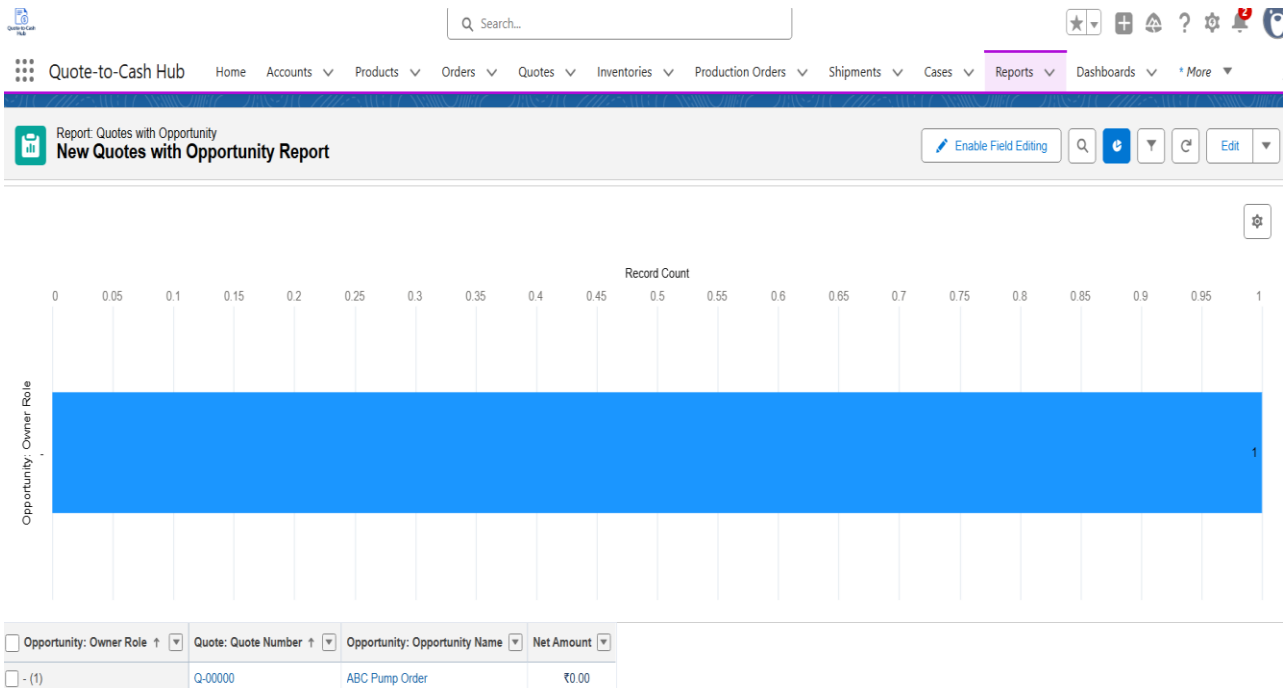
- Reports

Created reports that directly support Sales, Service, and Operations teams.

- Quotes Pipeline (Summary Report)
  - Report Type: Quotes with Opportunities (SBQQ__Quote__c).
  - Grouped by Sales Rep (Owner).
  - Shows Draft, Pending Approval, and Approved quotes.

- Orders vs Shipments (Summary Report)
  - Report Type: Orders with Shipments.
  - Grouped by Shipment Status (Shipped, Pending).
- Inventory Levels (Tabular Report with Filters)
  - Report Type: Inventory__c (custom object).
  - Fields: Name, Stock Level, Reorder Point, Location.
  - Filter: Stock_Level__c < Reorder_Point__c.

- On-Time Delivery (Matrix Report)
  - Rows: Shipment Status.
  - Columns: Region / Sales Rep.



◆ Report Types

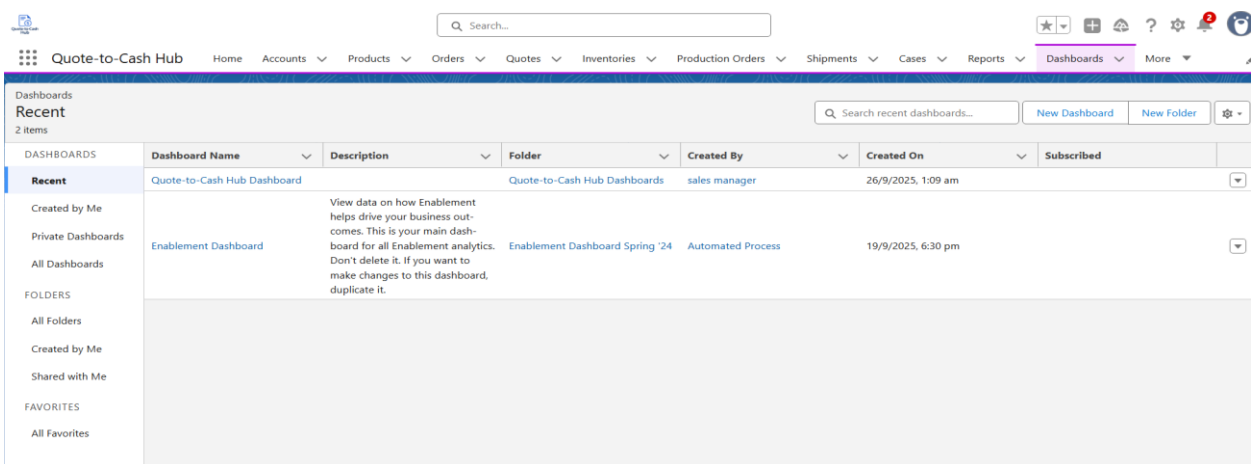
- Used Standard Report Types where available (Quotes with Opportunities, Orders with Shipments).
- Created Custom Report Types for custom objects:
- Inventory__c with Production Orders__c.
- Shipment__c with Orders__c.
- reporting across CPQ → Order → Production → Shipment.

◆ Dashboards

Built an Operations Command Center Dashboard in the Quote-to-Cash Hub Dashboards folder.

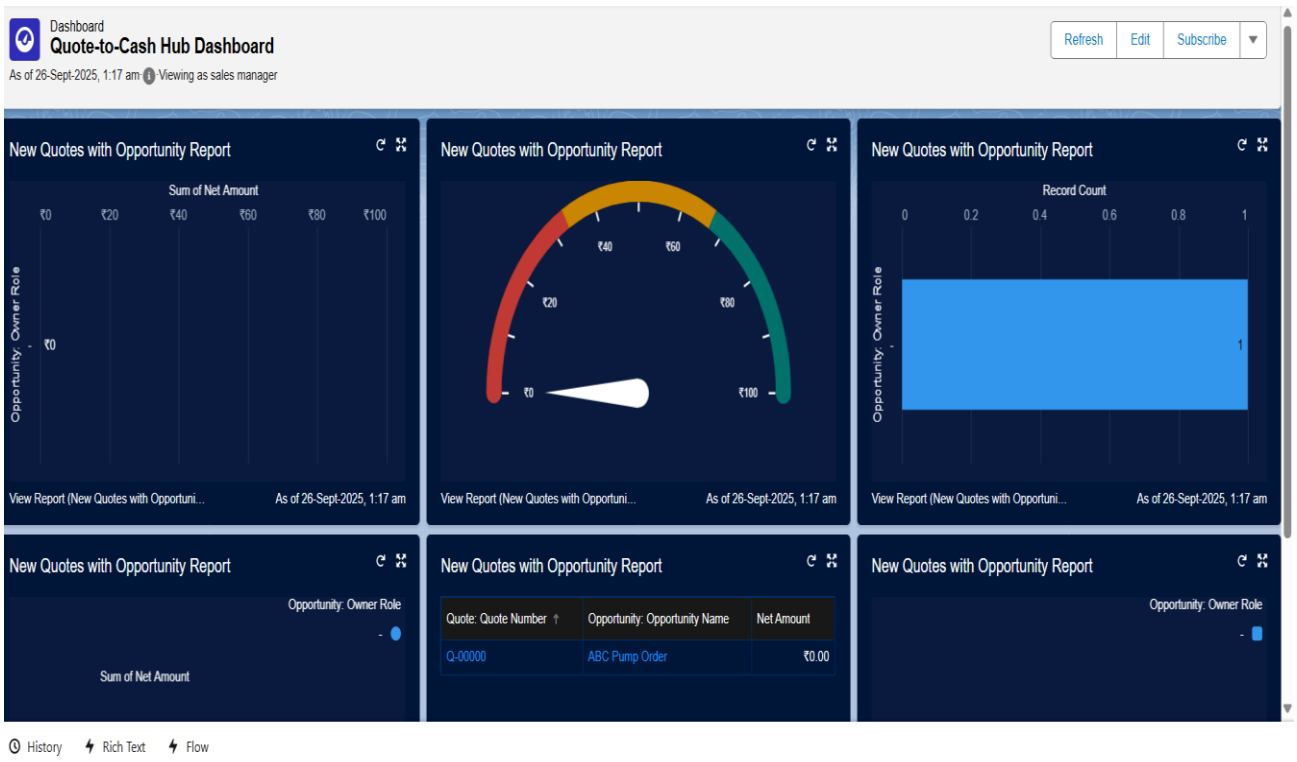
Components:

- Donut Chart: Orders vs Shipments.
- Horizontal Bar: Inventory Levels (low stock).
- Pipeline Funnel: Quotes by Status.



Dynamic Dashboards

- Configured Dynamic Dashboards for Sales Managers →so each manager sees only their team's pipeline without creating multiple dashboards.
- Set "Run Dashboard As: Logged-In User."



Sharing Settings

- Quote-to-Cash Hub Reports:
  - Sales Reps = Viewer.
  - Sales Managers = Editor.
  - Service & Operations = Viewer.
- Quote-to-Cash Hub Dashboards:
  - Executives = Manager.
  - Sales/Service/Operations = Viewer.

Field Level Security

a) Sharing Settings Review

- Quotes, Orders, Shipments, Inventory → confirm Org-Wide Defaults = Private.
- Sharing Rules already applied (Sales Manager sees all Reps,

Service Manager sees Shipments).

b) Field-Level Security Review

- Confirm sensitive fields (e.g., Discount %, Cost Price) visible only to Sales roles.
- Hide from Service/Operations.
- Setup → Object Manager → [Object] → Fields → Field-Level Security.

◆ Audit Trail

- Salesforce Setup Audit Trail enabled → tracks config changes (who changed sharing, reports, approvals).
- Used for compliance and project governance.