Phase 9: Reporting, Dashboards & Security Review – (Online Laptop Booking)

1. Reports

Reports allow users to **analyze and visualize Salesforce data**. For your Laptop Ordering system, several types of reports are used:

a. Tabular Reports

- **Definition:** Simple lists of records in rows and columns.

- **Project Example:**

  - **All Orders Report:** Shows Order Number, Customer, Dealer, Quantity, Status, and Order Date.

- **Use Case:** Quick export or view of all orders.

b. Summary Reports

- **Definition:** Groups records by field(s) and allows subtotal calculations.

- **Project Example:**

  - **Orders by Dealer Report:** Groups orders by Dealer and calculates **total orders, total quantity, and total value** per dealer.

- **Use Case:** Evaluate dealer performance and manage inventory allocation.

c. Matrix Reports

- **Definition:** Groups data by rows and columns for **cross-tab analysis**.

- **Project Example:**

  - **Orders by Customer & Status:** Shows how many orders each customer has, broken down by order status (Pending, Confirmed, Completed).

- **Use Case:** Track customer activity and identify delayed or high-priority orders.

d. Joined Reports

- **Definition:** Combines multiple report blocks into a single view.

- **Project Example:**

  - **Testing & Service Results per Order:** Combines Laptop Testing and Service Testing results for each order.

- **Use Case:** Provides a **holistic view of quality checks and service history** for orders.

2. Report Types

- **Definition:** Define **which objects and relationships** are available for reporting.

- **Project Example:**

  o Custom report type combining **Laptop Orders, Laptop Testing, and Laptop Service Testing**.

- **Impact:**

  o Users can generate **complex reports without writing code**.

 o Supports **joined reports and dashboards** that require data from multiple objects.
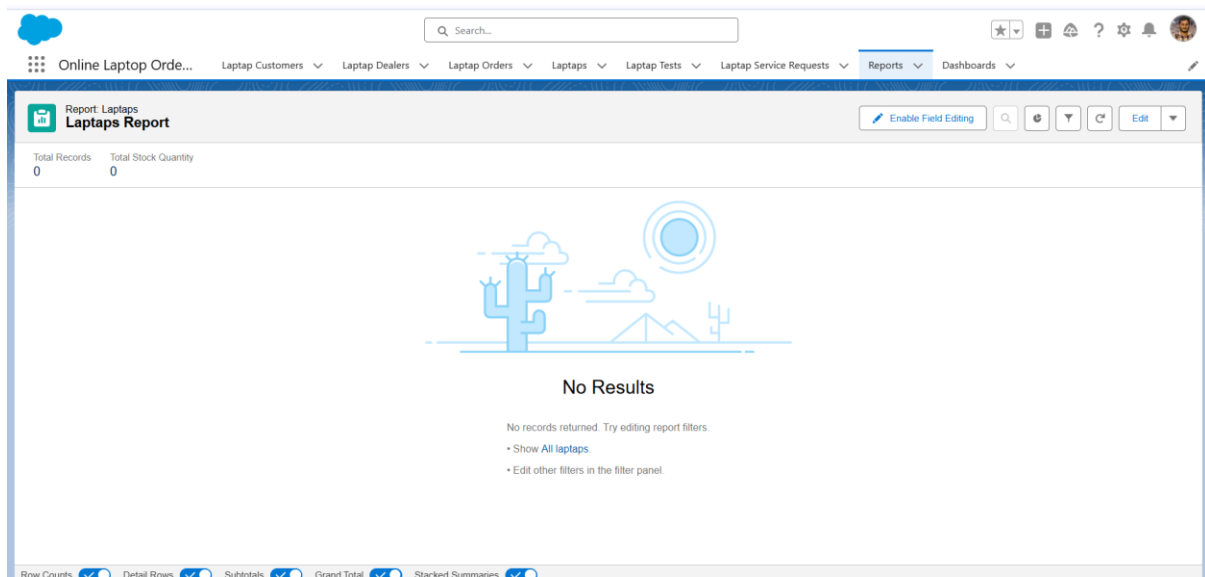
3. Dashboards

Dashboards provide **visual summaries of reports** using charts, tables, and gauges.

Project Dashboards:

1. **Dealer Performance Dashboard:**

   o Charts showing total orders, completed orders, and pending testing per dealer.

   o Allows management to **compare dealer efficiency**.

2. **Customer Order Tracking:**

   o Tracks each customer's orders, their status, and pending service/testing.

   o Helps **sales teams follow up proactively**.

3. **Pending Service Dashboard:**

   o Displays laptops pending testing or service completion.

   o Helps **service teams prioritize work**.
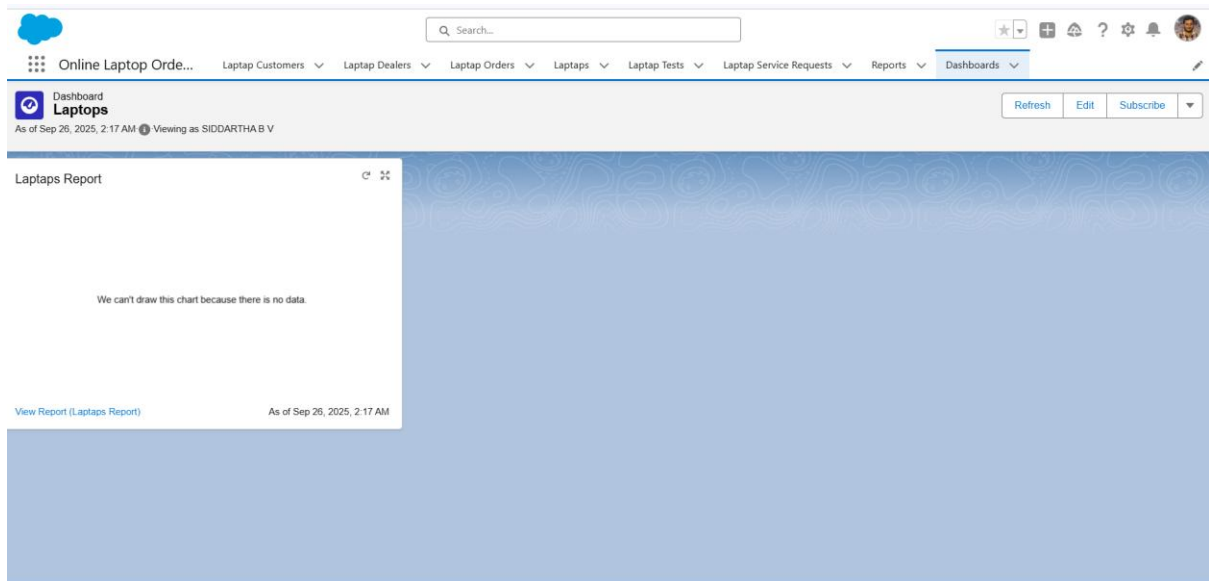
4. Dynamic Dashboards

- **Definition:** Dashboards that **change content based on the viewer's role**.

- **Project Implementation:**

  o **Admin:** Sees all orders, dealer performance, and service metrics.

  o **Dealer:** Sees only orders assigned to them.

  o **Sales:** Sees customer orders and approvals relevant to their territory.

- **Impact:**

  o Ensures **role-based visibility and security** while reducing clutter.

  o Supports **data-driven decision making** for each user type.

5. Field Level Security (FLS) & Sharing Settings

- **Field Level Security:**

  o Restricts sensitive fields based on profile.

  o Example: Only Admin can see **cost price or profit margin**, while Sales sees only **selling price**.

- **Sharing Settings (OWD & Rules):**

  o **Organization-Wide Defaults:** Set core objects (Orders, Customers) to Private.

  o **Sharing Rules:** Dealers see only orders assigned to them; Sales sees only their customers.

- **Impact:**

- o Protects sensitive information
- o Ensures compliance with **internal policies or regulations**

6. Session Settings, Login IP Ranges & Audit Trail

- **Session Settings:**
  - o Configure **timeout periods, session security, and login policies**.
- **Login IP Ranges:**
  - o Restrict logins to trusted networks or locations to prevent unauthorized access.
- **Audit Trail:**
  - o Tracks **metadata changes** like field updates, object creation, or automation deployment.
  - o Provides a history of **who changed what and when**.

Impact:

- Ensures **data security, regulatory compliance, and accountability**.
- Helps track suspicious activity or errors in the system.

Summary of Phase 9

1. **Reports:** Tabular, Summary, Matrix, Joined reports provide **actionable insights**.
2. **Report Types:** Custom report types combine related objects for **complex reporting**.
3. **Dashboards:** Visualize KPIs for dealers, sales, and service teams.
4. **Dynamic Dashboards:** Role-based dashboards improve **data accessibility and security**.
5. **Field Level Security / Sharing Settings:** Protect sensitive data and enforce **role-based access**.
6. **Session Settings / Login IP Ranges / Audit Trail:** Monitor **security, compliance, and system changes**.