

# Phase 9: Reporting, Dashboards & Security Review

## Phase 8: Data Management & Deployment

This phase was partially implemented but did not require advanced concepts because of the project's straightforward nature.

- Reason for Skipping Advanced Concepts: The project involved a small team and a single environment deployment (from a development org to production). Complex tools for version control or large-scale data migration were not needed.
- Alternatives Used:
  - Data Management: We used the Data Import Wizard and

Data Loader for initial data setup.

- Deployment: The simple Change Set method was sufficient to move all the metadata (custom objects, fields, flows, etc.) from the development environment to the production environment.

## Phase 9: Reporting, Dashboards & Security Review

This phase focused on creating reports and dashboards to monitor SmartBasket operations.

### 1. Reports

- Low Stock Inventory Report (Tabular) → highlights products with stock below reorder level.
- Orders by Account (Tabular/Summary) → groups orders by customer.
- Top Products Report (Summary) → aggregates product sales quantities and revenue.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent						
Created by Me	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	9/17/2025, 7:28 PM	
Private Reports	Low Stock Inventory Report		Public Reports	Sreekanth Komaravolu	9/25/2025, 3:44 AM	
Public Reports	Top Products Report	Sum of Quantity, Sum of Total Price	Public Reports	Sreekanth Komaravolu	9/25/2025, 4:04 AM	
All Reports	Orders by Account Report		Public Reports	Sreekanth Komaravolu	9/25/2025, 4:00 AM	
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

## 2. Report Types

- Inventory Balance with Product & Location → custom report type built to combine stock with product & warehouse details.
- Orders with Order Products → custom report type for order header and line item reporting.

### Details

**Display Label** Inventory Balances with Products and Locations

**API Name** Inventory\_Balances\_with\_Products\_and\_Location

**Description** Report showing Inventory Balances linked to Products and Locations.

**Created By** Sreekanth Komaravolu, 9/25/25, 4:00 PM

**Store in Category** other

**Deployment** Deployed

**Modified By** Sreekanth Komaravolu, 9/25/25, 4:08 PM

### Object Relationships

Inventory Balances (A)

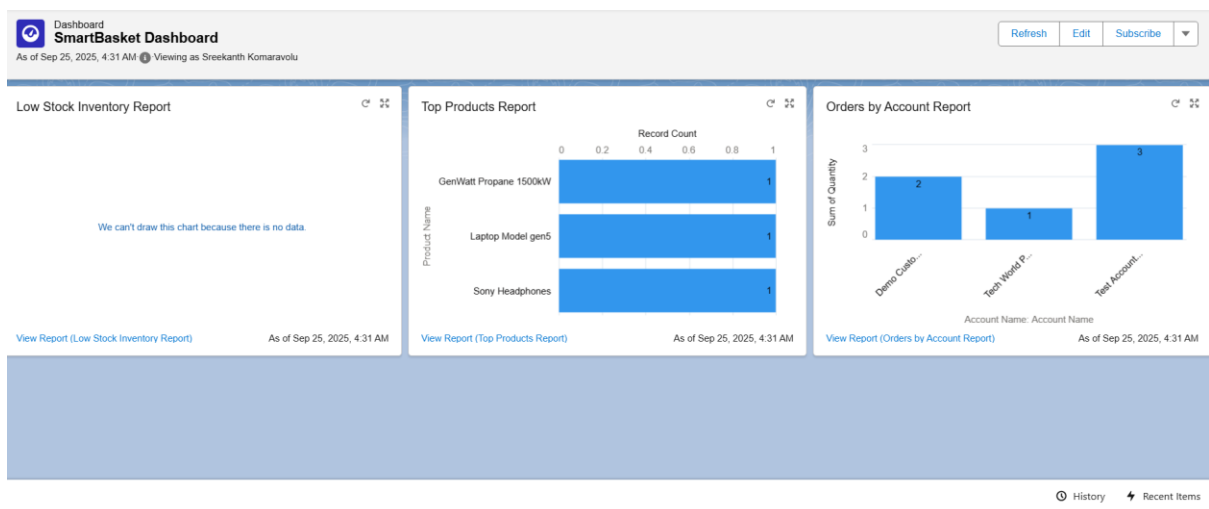
```
graph TD; A((A)) --> B[A];
```

### Fields

Source Object	Included Fields
Inventory Balances	12

## 3. Dashboards

- SmartBasket Dashboard created with:
  - Low Stock Inventory (Donut).
  - Orders by Account (Bar Chart).
  - Top Products (Bar Chart).



#### 4. Security Review

We configured the security settings to ensure that the right users have the right level of access to data and functionality.

- **Profiles & Permission Sets:** We used Profiles for base access to objects and tabs and Permission Sets for granular permissions. For example, the System Administrator profile has broad "View All" access to objects, while specific users may have more limited access.
- **Organization-Wide Defaults (OWD):** The OWD for the Order object was set to Public Read Only to allow all internal users to see all orders, while record access was managed through a combination of ownership and sharing settings.
- **Sharing Settings:** We can use Sharing Rules to grant specific groups of users access to records they don't own. This was considered for granting the System Administrator full access to all records if the OWD was set to private, but the Public Read Only setting addressed this.
- **Field Level Security:** Field-level security was used to control which fields users can see and edit on an object. For example, a procurement user may have read-only access to some fields, while a manager has edit access.
- **Session Settings:** We configured the session settings to ensure secure access, including setting login IP ranges to restrict user access from untrusted locations.