Salesforce Project Phase-9 :- Reporting, Dashboards & Security Review

Title :- Dairy Management System Private Limited Using Salesforce CRM

Reports

Reports were created to provide insights on **milk production, orders, and quality control**. The specific reports developed are:

- **Quality Test Report**

    - **Type**: Summary Report

    - **Purpose**: Tracks results of milk quality tests for each batch of milk collected.

    - **Use**:

        - Shows **Cattle ID, Collection Date, Milk Quality Score, and Test Result**.

        - Helps identify batches that fail quality standards for timely action.

- **New Orders Report**

  o **Type**: Tabular Report

  o **Purpose**: Lists all recent orders placed by customers.

  o **Use**:

    ▪ Displays **Order Number, Customer, Order Date, Product, Quantity, and Total Amount**.

    ▪ Helps track sales activity and manage order fulfillment efficiently.
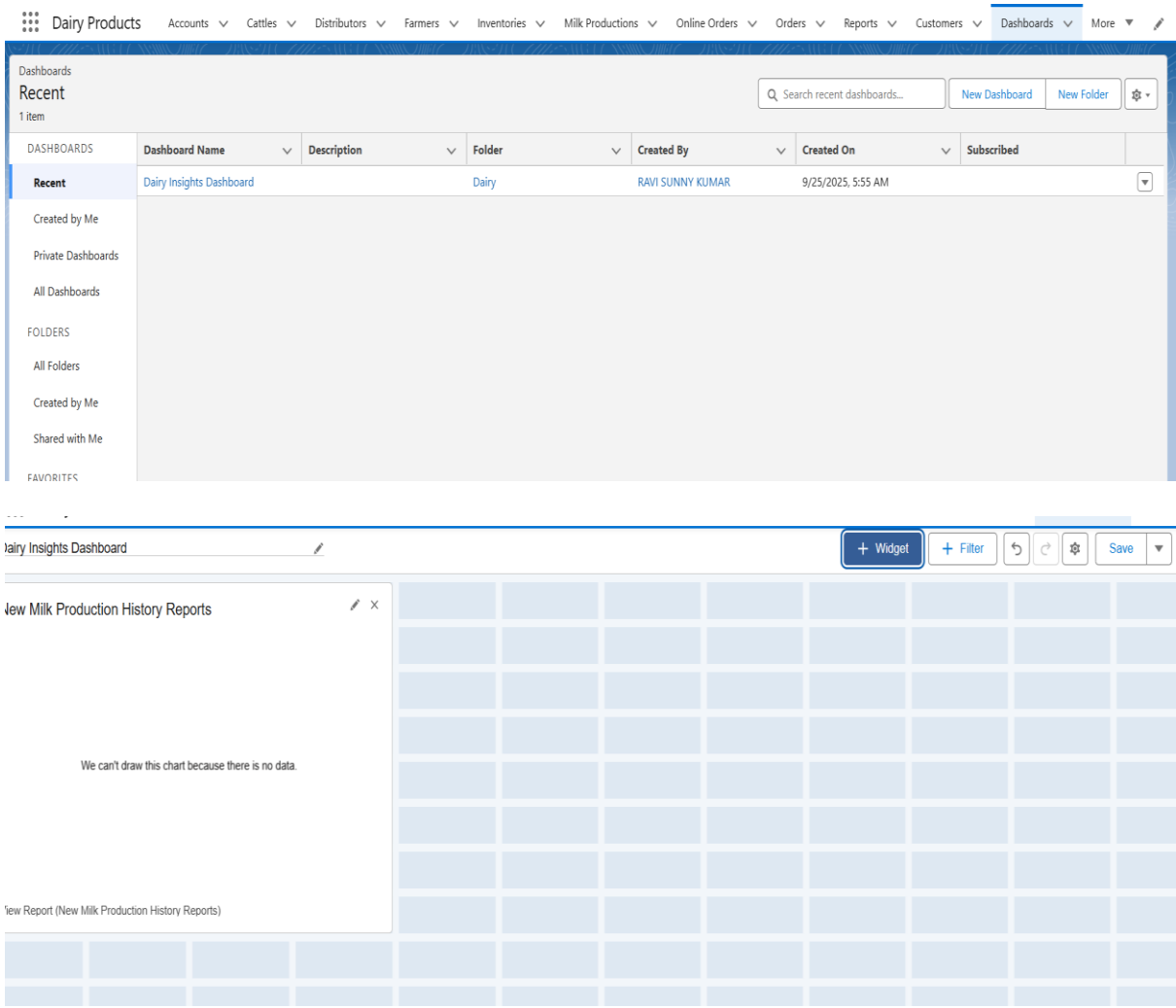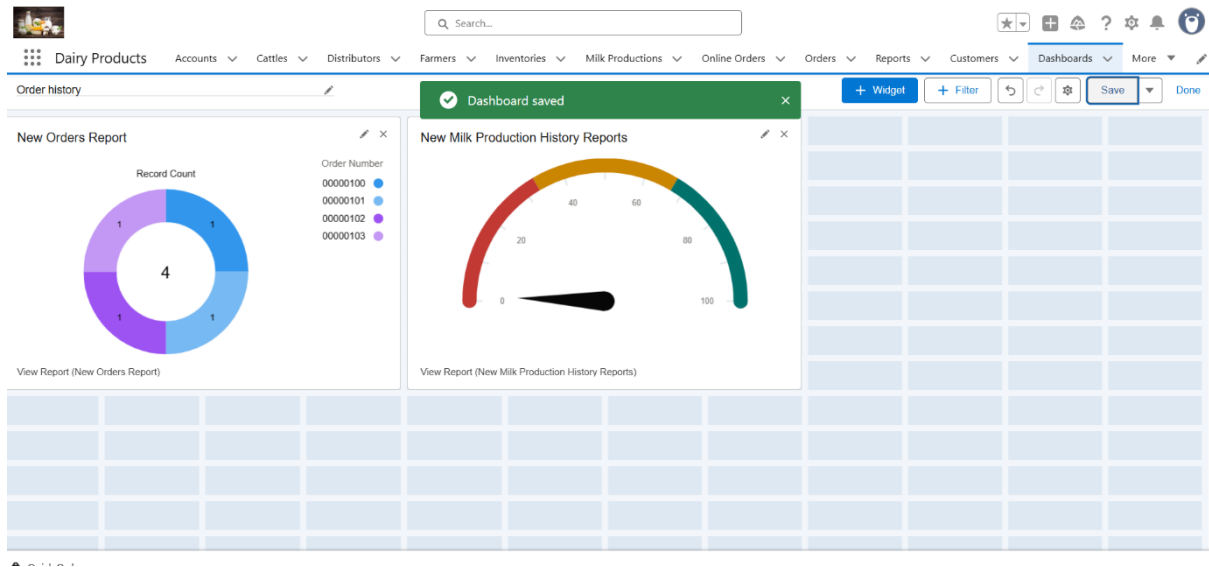

- **New Milk Production History Report**

  o **Type**: Summary Report

  o **Purpose**: Monitors milk production trends for each cattle over time.

  o **Use**:

    ▪ Shows **Cattle ID, Date, Milk Quantity, and Total Daily Production**.

    ▪ Enables identification of high and low-producing cattle and supports farmer performance evaluation.

Report Types

Custom report types were used to enable accurate reporting:

- **Milk Production Report Type**: Links **Cattle** with **Milk Production History**.

- **Order Report Type**: Links **Orders** with **Customers**.

- **Quality Test Report Type**: Links **Milk Production** with **Quality Test records**.

Dashboard

- **Dairy Insights Dashboard**

  - Created a consolidated dashboard that brings together all the important reports.

  - **Components Included**:

    - **Bar/Line Chart (Milk Production Trends)** – From *New Milk Production History Report*.

    - **Table/Chart of New Orders** – From *New Orders Report*.

    - **Donut Chart of Quality Results (Pass/Fail %)** – From *Quality Test Report*.

  - **Purpose**: Provides a single-page overview of production, quality, and sales performance for managers and stakeholders.

Audit Trail

- **Purpose**: Tracks all administrative and data changes.

- **Implementation in Project**:

    o Monitored changes made to **Reports, Dashboards, Farmer, Milk Production, and Orders**.

    o Setup Audit Trail in Salesforce was enabled and reviewed regularly.

- **Outcome**: Provided transparency, accountability, and ensured data integrity.