

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.

Reports							
Recent							
5 items							
REPORTS	Report Name ▾	Description ▾	Folder ↑ ▾	Created By ▾	Created On ▾	Subscribed	
Recent	Quality Test		Dairy Reports	RAVI SUNNY KUMAR	9/25/2025, 10:59 PM		▾
Created by Me	New Orders Report		Dairy Reports	RAVI SUNNY KUMAR	9/25/2025, 10:52 PM		▾
Private Reports	New Milk Production History Reports		Public Reports	RAVI SUNNY KUMAR	9/25/2025, 6:15 AM		▾
Public Reports	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	9/15/2025, 7:46 PM		▾
All Reports							
FOLDERS	New Milk Production History Report		Dairy Reports	RAVI SUNNY KUMAR	9/25/2025, 6:10 AM		▾
All Folders							
Created by Me							
Shared with Me							
FAVORITES							
All Favorites							

- **New Orders Report**

- **Type:** Tabular Report
- **Purpose:** Lists all recent orders placed by customers.
- **Use:**
 - Displays **Order Number, Customer, Order Date, Product, Quantity, and Total Amount.**
 - Helps track sales activity and manage order fulfillment efficiently.

Report: Orders

New Orders Report

Enable Field Editing

Q

Add Chart

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Edit

▼

Total Records

2

<input type="checkbox"/> Order Number ↑	<input type="checkbox"/> Status ↑	<input type="checkbox"/> Order Type ↑	<input type="checkbox"/> Account Name	<input type="checkbox"/> Account Owner	<input type="checkbox"/> Order Start Date	<input type="checkbox"/> Order Amount	<input type="checkbox"/> Created Date
<input type="checkbox"/> 00000100 (1)	Draft (1)	- (1)	fogf	RAVI SUNNY KUMAR	9/22/2025	₹0.00	9/23/2025
		Subtotal					
		Subtotal					
		Subtotal					
<input type="checkbox"/> 00000101 (1)	Draft (1)	- (1)	gvjgfu	RAVI SUNNY KUMAR	9/23/2025	₹0.00	9/23/2025
		Subtotal					
		Subtotal					
		Subtotal					
		Total (2)					

Row Counts

Detail Rows

Subtotals

Grand Total

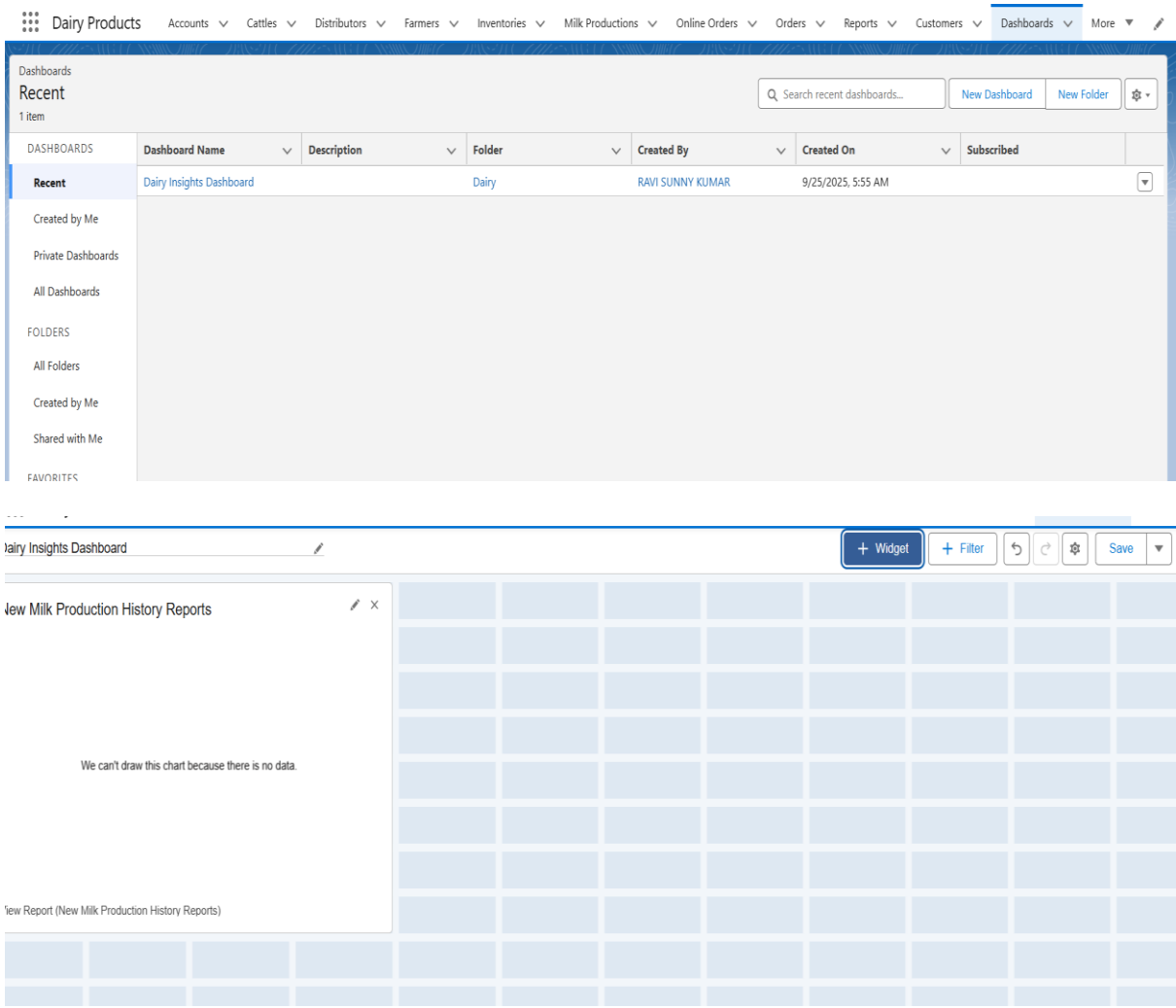
Quick Order

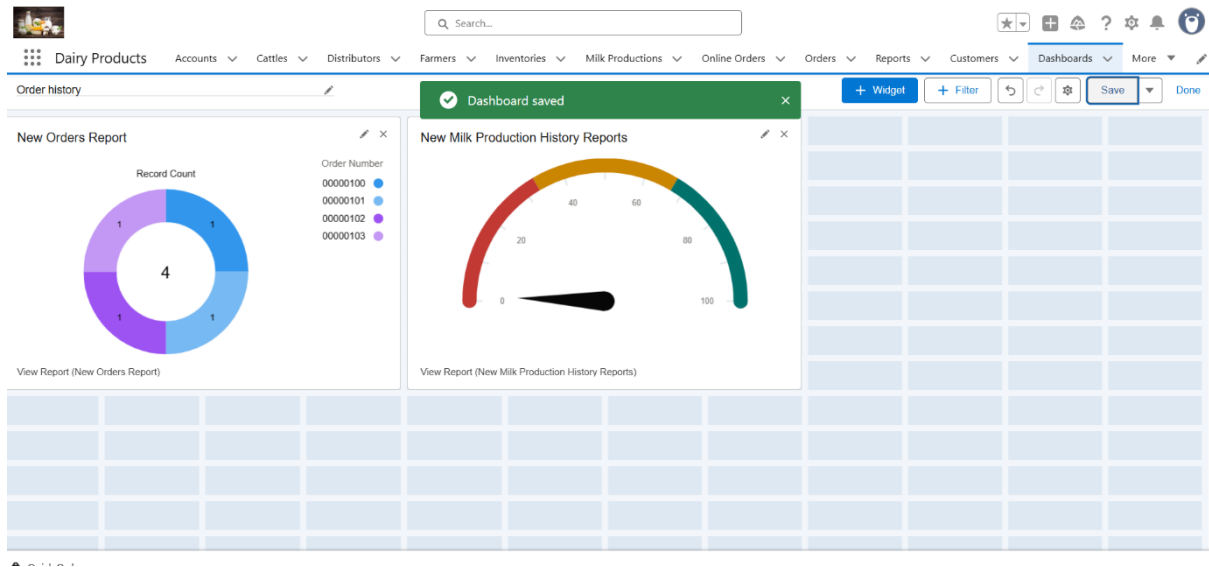
- **New Milk Production History Report**

- **Type:** Summary Report
- **Purpose:** Monitors milk production trends for each cattle over time.
- **Use:**
 - Shows **Cattle ID, Date, Milk Quantity, and Total Daily Production.**
 - Enables identification of high and low-producing cattle and supports farmer performance evaluation.

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:**
 - Monitored changes made to **Reports, Dashboards, Farmer, Milk Production, and Orders.**
 - Setup Audit Trail in Salesforce was enabled and reviewed regularly.
- **Outcome:** Provided transparency, accountability, and ensured data integrity.

View Setup Audit Trail					
Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/25/2025, 11:37:44 PM PDT	30rsunnykumar573@agentforce.com		For user 30rsunnykumar573@agentforce.com, the User Verified Email status changed to verified	Manage Users	
9/25/2025, 10:07:50 PM PDT	30rsunnykumar573@agentforce.com		For duplicate rule Cattle_Tag1__c, changed matching rules.	Duplicate Rule	
9/25/2025, 10:07:50 PM PDT	30rsunnykumar573@agentforce.com		Created new 01gL000002l8Ar duplicate rule "Cattle_Tag1__c". Set "Record-Level Security" to "Enforce sharing rules"	Duplicate Rule	
9/25/2025, 10:05:40 PM PDT	30rsunnykumar573@agentforce.com		For matching rule Cattle_Tag__c, added matching criteria where matching method is Exact, the field is Name and match blank fields is "Does Not Match if Null"	Matching Rule	
9/25/2025, 10:05:40 PM PDT	30rsunnykumar573@agentforce.com		For matching rule Cattle_Tag__c, matching engine set to Exact Match Engine.	Matching Rule	
9/25/2025, 10:05:39 PM PDT	30rsunnykumar573@agentforce.com		Created new Cattle matching rule Cattle_Tag__c	Matching Rule	
9/25/2025, 10:05:05 PM PDT	30rsunnykumar573@agentforce.com		Created new 01gL000002l8Ar duplicate rule "Cattle_Tag__c". Set "Record-Level Security" to "Enforce sharing rules"	Duplicate Rule	
9/25/2025, 9:42:02 PM PDT	30rsunnykumar573@agentforce.com		Changed MilkProductionBatchTest Apex Class code	Apex Class	
9/25/2025, 9:42:02 PM PDT	30rsunnykumar573@agentforce.com		Changed MilkProductionBatch Apex Class code	Apex Class	
9/25/2025, 9:40:31 PM PDT	30rsunnykumar573@agentforce.com		Changed MilkProductionBatchTest Apex Class code	Apex Class	
9/25/2025, 9:40:22 PM PDT	30rsunnykumar573@agentforce.com		Changed Cattle page layout Cattle Layout	Custom Objects	