

Reports

Reports were created to provide insights into key operational metrics.

- **Daily Bookings:**
 - **Report Type:** Bookings
 - **Configuration:** Grouped by Created Date (grouped by Calendar Day). Shows columns like Booking Number, Station, Slot, Status, Total Price. Filtered by date as needed.
 - **Purpose:** To track the volume of bookings created each day.
- **Revenue by Station:**
 - **Report Type:** Bookings
 - **Configuration:** Grouped by Station. Summarizes the Total Price field (Sum). Filtered to include only Completed Bookings.
 - **Purpose:** To analyze revenue generation per charging station.
- **Slot Utilization:**
 - **Report Type:** Slots
 - **Configuration:** Grouped first by Station, then by Availability. Shows Slot Name. Optionally includes a stacked bar chart (X-Axis: Station, Y-Axis: Record Count, Stack By: Availability).
 - **Purpose:** To visualize the current status (Available, Unavailable, etc.) of slots across different stations.

Recent | Reports | Salesforce x Duplicate Rules | Salesforce x Charging Slot | Salesforce x +

orgfarm-fd852816e-dev-ed.develop.lightning.force.com/lightning/r/Report/home?queryScope=mrui

EV Charging CRM Accounts Contacts Vehicles Charging Stations Charging Slots Bookings Payments Cases Slot Utilization by Station

Reports Recent 5 Items

Search recent reports... New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Bookings Report		Private Reports	Uppari Pedda Venkatesh	10/17/2025, 5:28 AM	
Created by Me	Slot Utilization by Station		Private Reports	Uppari Pedda Venkatesh	10/17/2025, 5:35 AM	
Private Reports	Revenue by Station		Private Reports	Uppari Pedda Venkatesh	10/17/2025, 5:32 AM	
Public Reports	Daily Bookings		Public Reports	Uppari Pedda Venkatesh	10/17/2025, 5:30 AM	
All 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	10/5/2025, 7:57 PM	

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

29°C Mostly cloudy 11:33 18-10-2025

Slot Utilization by Station | Sale x Duplicate Rules | Salesforce x Charging Slot | Salesforce x +

orgfarm-fd852816e-dev-ed.develop.lightning.force.com/lightning/r/Report/000gl000005yCDPLUA2/view?queryScope=userFolders

EV Charging CRM Accounts Contacts Vehicles Charging Stations Charging Slots Bookings Payments Cases Slot Utilization by Station

Report: Charging Slots Slot Utilization by Station

Enable Field Editing Search Add Chart Edit

Total Records: 3

Station	Availability	Available	Total
STN-0001	Record Count	1	1
STN-0002	Record Count	1	0
Total	Record Count	2	1

Details (3 Rows) Click an intersection in the table above to filter details.

Charging Slot: Slot Number
1 SLO-001
2 SLO-003
3 SLO-002
4

Row Counts Detail Rows Grand Total Stacked Summaries

29°C Mostly cloudy 11:33 18-10-2025

New Bookings Report | Sale x Duplicate Rules | Salesforce x Charging Slot | Salesforce x +

orgfarm-fd852816e-dev-ed.develop.lightning.force.com/lightning/r/Report/000gl000005yCGLUA2/view?queryScope=userFolders

EV Charging CRM Accounts Contacts Vehicles Charging Stations Charging Slots Bookings Payments Cases New Bookings Report

Report: Bookings New Bookings Report

Enable Field Editing Search Add Chart Edit

Total Records: 1 Total Total Price: \$6,000

Booking: Created Date	Booking: Booking Number	Charging Station	Charging Slot	Start Time	Status	Total Price
10/17/2025 (1)	BK-00012	-	-	10/17/2025, 12:00 PM	-	\$6,000
Subtotal						\$6,000
Total (1)						\$6,000

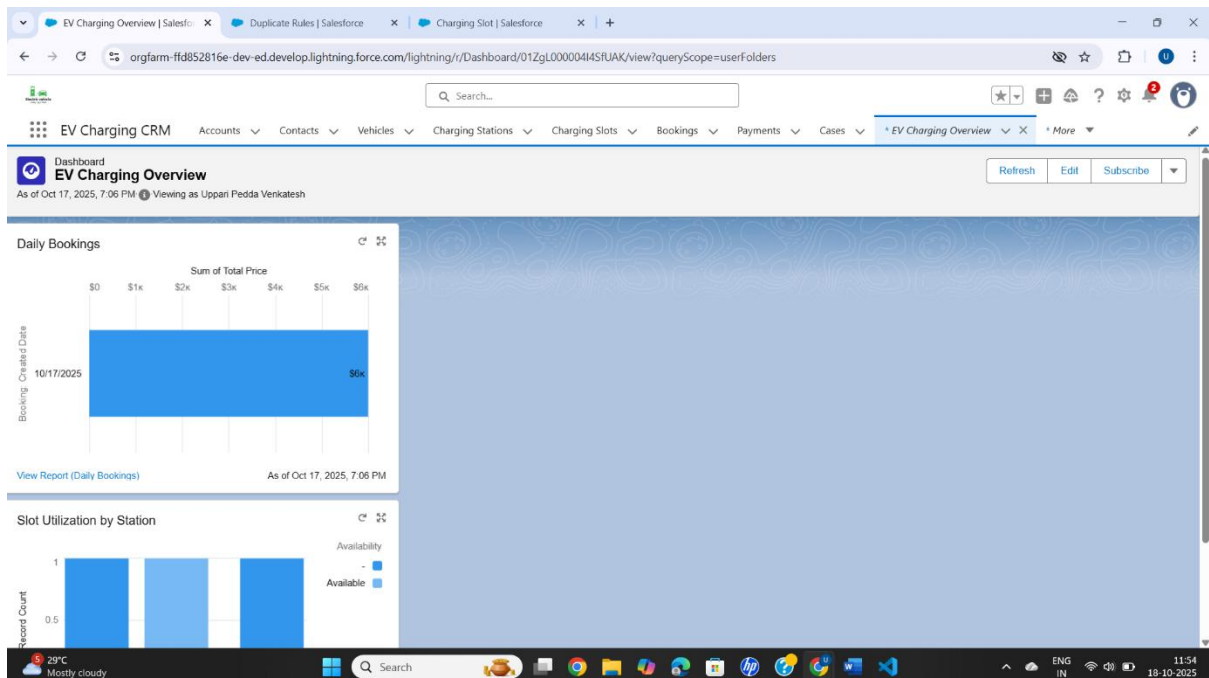
Row Counts Detail Rows Subtotals Grand Total

29°C Mostly cloudy 11:33 18-10-2025

Dashboard

A central dashboard was created to provide a high-level overview of key performance indicators (KPIs).

- **Dashboard Name:** EV Charging Overview
- **Components Added:**
 1. **Total Bookings Today:** Uses the Daily Bookings report (filtered for Today), displayed as a **Metric** component showing the Record Count.
 2. **Revenue by Station:** Uses the Revenue by Station report, displayed as a **Bar Chart** showing the Sum of Total Price per Station.
 3. **Overall Slot Utilization:** Uses the Slot Utilization by Station report, displayed as a **Gauge** component showing Record Count against defined thresholds, or using the report's built-in chart.



Security Review

The security model was configured using a layered approach to ensure users have appropriate access.

- **Organization-Wide Defaults (OWD):**
 - Set the baseline access for objects.
 - Booking: Private
 - Payment: Private
 - Station: Public Read Only
 - Slot: Controlled by Parent (inherits from Station due to Master-Detail relationship)
 - Account/Contact: Private (or as per organizational requirements)
- **Role Hierarchy:**
 - Established a vertical structure (e.g., CEO \rightarrow Operations Manager \rightarrow Station Manager \rightarrow Station Staff).
 - Enables managers to view records owned by subordinates when OWD is Private.
- **Profiles:**
 - Define object permissions (Create, Read, Edit, Delete), field permissions, app access, etc.
 - A custom profile Station Staff was cloned from Standard User and configured with specific permissions needed for the role (e.g., Read/Create/Edit on Bookings, Read-Only on Stations).
- **Sharing Rules:**
 - Used to grant additional record access laterally or based on criteria when OWD is restrictive.

- Example: A criteria-based rule (Share Bookings within Station) shares Booking records with users in the same Station Staff role or group based on the Station associated with the Booking, granting Read access.

- **Permission Sets:**

- Used to grant *additional* permissions to specific users without changing their profile.
- Example: A Manage Payments permission set grants Edit/Delete access on the Payment__c object and is assigned only to users in the finance team.

- **Field-Level Security (FLS):**

- Controls visibility and editability of specific fields for different profiles.
- Example: The Hourly_Rate__c field on the Slot__c object was made Read-Only or Hidden for the Station Staff profile via Field-Level Security settings on the field itself.

The screenshot displays the Salesforce 'Sharing Settings' page. The left sidebar shows the 'Setup' menu with 'Security' expanded and 'Sharing Settings' selected. The main content area is titled 'Sharing Settings' and lists several categories of sharing rules: Booking, Case, Charging Slot, Charging Station, Payment, and Vehicle. The 'Charging Slot Sharing Rules' category is expanded, revealing a table of rules. The table has four columns: 'Action', 'Criteria', 'Shared With', and 'Access Level'. A single rule is listed with the criteria '(Charging \$Slot: Total \$lots EQUALS 100) AND (Charging \$Slot: \$lot Number CONTAINS pending)', shared with the 'Station Staff' role, and set to 'Read Only' access. The bottom of the screen shows a Windows taskbar with the date and time as 18-10-2025, 10:42.

Action	Criteria	Shared With	Access Level
Edit Del	(Charging \$Slot: Total \$lots EQUALS 100) AND (Charging \$Slot: \$lot Number CONTAINS pending)	Role: Station Staff	Read Only

Recently Viewed | Accounts | Setup | Permission Sets | Salesforce | Charging Slot | Salesforce | New Tab

orgfarm-ffd852816e-dev-ed.develop.my.salesforce-setup.com/lightning/setup/PermSets/0PSgL0000080N5//PermissionSetAssignment/home

Search Setup

Setup Home Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for? Try using Global Search.

Manage Payments

Current Assignments

Full Name ↑

Active

Role

Profile

User License

Expires On

Uppari Pedda Venkatesh

✓

System Administrator

Salesforce

Add Assignment

Watchlist Ideas

Search

ENG IN

09:47

18-10-2025

EV Charging Overview | Salesfo | Activations | Salesforce | Charging Slot | Salesforce

orgfarm-ffd852816e-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ActivatedIpAddressAndClientBrowsersPage/home

Search Setup

Setup Home Object Manager

Quick Find

Setup Home

Salesforce Go

Service Setup Assistant

Commerce Setup Assistant

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

Users

Data

Email

PLATFORM TOOLS

Subscription Management

Apps

Feature Settings

29°C Mostly cloudy

Activations

Login IP

The list below shows login IP addresses of the browser or application that the user used to log in.

View: All Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Username ↑

Login IP

Created Date

Is Authenticated

Challenge Completed Date

upparivenkatesh08771@agentforce.com

117.213.146.33

10/13/2025, 6:10 PM

✓

upparivenkatesh08771@agentforce.com

139.167.130.38

10/16/2025, 11:23 PM

✓

upparivenkatesh08771@agentforce.com

117.192.50.39

10/17/2025, 1:01 AM

✓

upparivenkatesh08771@agentforce.com

157.50.79.126

10/17/2025, 11:18 PM

✓

Remove

Activated Client Browsers

The list below shows activated browser agent information stored when a user verifies identity during login.

View: All Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Username ↑

User Agent String

Proxy Info

Created Date

Last Update

upparivenkatesh08771@agentforce.com

Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/141.0.0.0 Safari/537.36

10/13/2025, 6:10 PM

10/17/2025, 11:18 PM

upparivenkatesh08771@agentforce.com

Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/140.0.0.0 Safari/537.36

10/15/2025, 7:11 AM

10/15/2025, 7:11 AM

Remove

ENG IN

12:02

18-10-2025