

Phase 9: Reporting, Dashboards & Security Review

Project: Groundnut Mill Management

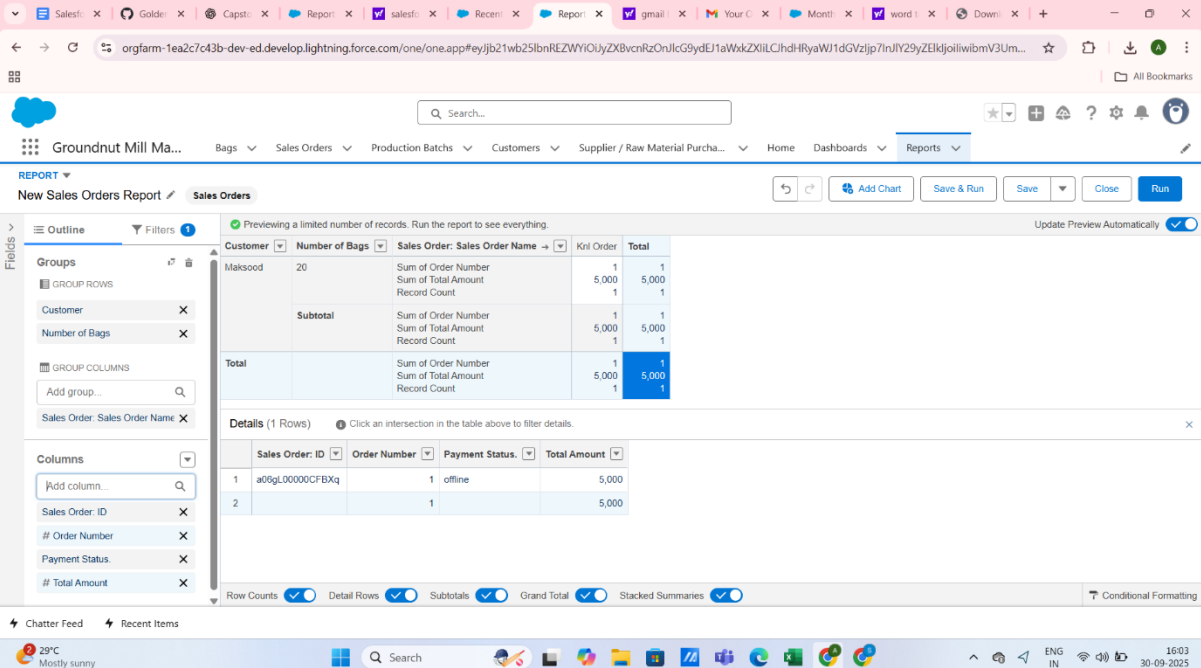
Objective of Phase 9

The goal of this phase is to provide **visibility** into the Groundnut Mill's operations through **reports and dashboards**, and to ensure proper **data security** with Salesforce's security features.

1. Reports

1.1 Tabular Report – *All Sales Orders*

- **Purpose:** To display a simple list of all sales orders.
- **Steps:**
 1. Reports tab → New Report → Select **Sales Orders**.
 2. Add columns: *Order Number, Customer, Order Date, Number of Bags, Total Amount, Payment Status*.
 3. Filters: Show Me = All, Date Range = Current Fiscal Year.
 4. Save report as Sales Orders - Tabular.
 5. Save to folder: Groundnut Mill Reports.



The screenshot displays the Salesforce Reports interface for a new report titled "New Sales Orders Report" under the "Sales Orders" object. The report is in the "Preview" state, showing a limited number of records. The interface includes a sidebar with "Groups" (Customer, Number of Bags) and "Columns" (Sales Order: ID, Order Number, Payment Status, Total Amount). The main table shows a summary of sales orders for the customer "Maksoud", including a subtotal and a total. A "Details" section below the table shows individual sales order records.

Customer	Number of Bags	Sales Order: Sales Order Name	Kn1 Order	Total
Maksoud	20	Sum of Order Number	1	1
		Sum of Total Amount	5,000	5,000
		Record Count	1	1
	Subtotal	Sum of Order Number	1	1
		Sum of Total Amount	5,000	5,000
		Record Count	1	1
Total		Sum of Order Number	1	1
		Sum of Total Amount	5,000	5,000
		Record Count	1	1

Sales Order: ID	Order Number	Payment Status	Total Amount
1	a00gL00000CFBXq	1 offline	5,000
2		1	5,000

REPORT ▼

New Sales Orders Report / **Sales Orders**

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Customer	Number of Bags	Sales Order: Sales Order Name	Knl Order	Total
Maksood	20	Sum of Order Number	1	1
		Sum of Total Amount	5,000	5,000
		Record Count	1	1
	Subtotal	Sum of Order Number	1	1
		Sum of Total Amount	5,000	5,000
		Record Count	1	1
Total		Sum of Order Number	1	1
		Sum of Total Amount	5,000	5,000
		Record Count	1	1

Details (1 Rows) Click an intersection in the table above to filter details.

Sales Order: ID	Order Number	Payment Status	Total Amount
1	a06gl00000CFBXq	offline	5,000
2		1	5,000

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒ Stacked Summaries: ☒ Conditional Formatting: ☐

1.2 Summary Report – Sales Orders by Customer

- **Purpose:** To analyze sales performance per customer.
- **Steps:**
 1. Reports tab → New Report → Select **Sales Orders**.
 2. Add columns: *Order Number, Customer, Order Date, Number of Bags, Total Amount*.
 3. Group by **Customer**.
 4. Summarize **Total Amount** and **Number of Bags** (SUM).
 5. Add a chart (bar chart or donut chart).
 6. Save report as Sales Orders by Customer - Summary.
 7. Save to folder: Groundnut Mill Reports.

The screenshot displays the Salesforce Lightning Reports interface. The top navigation bar includes a search bar and a menu with options like 'Groundnut Mill Ma...', 'Bags', 'Sales Orders', 'Production Batches', 'Customers', 'Supplier / Raw Material Purcha...', 'Home', 'Dashboards', and 'Reports'. The 'Reports' tab is selected.

The main content area shows a 'New Sales Orders Report' with a 'Sales Orders' filter. The report is in 'Preview' mode, showing a table with columns: Customer, Number of Bags, Total Amount, Kni Order, Subtotal, and Total. The data is grouped by Customer (Maksood) and Number of Bags (20). The 'Total' column shows a value of 1. The 'Details' section shows 1 row with columns: Sales Order: ID, Order Number, and Payment Status. The data row shows: 1, a06gl00000CFBXq, 1, offline.

The bottom section shows a 'New Sales Orders with Customer Report' with a 'Sum of Order Number' chart. The chart has a horizontal axis labeled 'Sum of Order Number' ranging from 0 to 1. The vertical axis is labeled 'Order Date' with a value of 9/18/2025. The chart area is currently blank, with a blue bar at the bottom.

2. Dashboards

2.1 Sales Dashboard

- **Purpose:** To visualize overall sales and production performance.
- **Steps:**
 1. Dashboards tab → New Dashboard.
 2. Name: Groundnut Mill Dashboard.

3. Folder: Groundnut Mill Reports.

4. Add Components:

- Component 1 → From *Tabular Report* → Show recent orders (Table).
- Component 2 → From *Summary Report* → Show **Total Sales by Customer** (Bar/Donut Chart).
- Component 3 → Optional → Bags Produced per Batch (if data available).

5. Save.

