

## Smart Waste Management Tracker – Salesforce Project

### Phase 7: Reports & Dashboards

#### Objective:

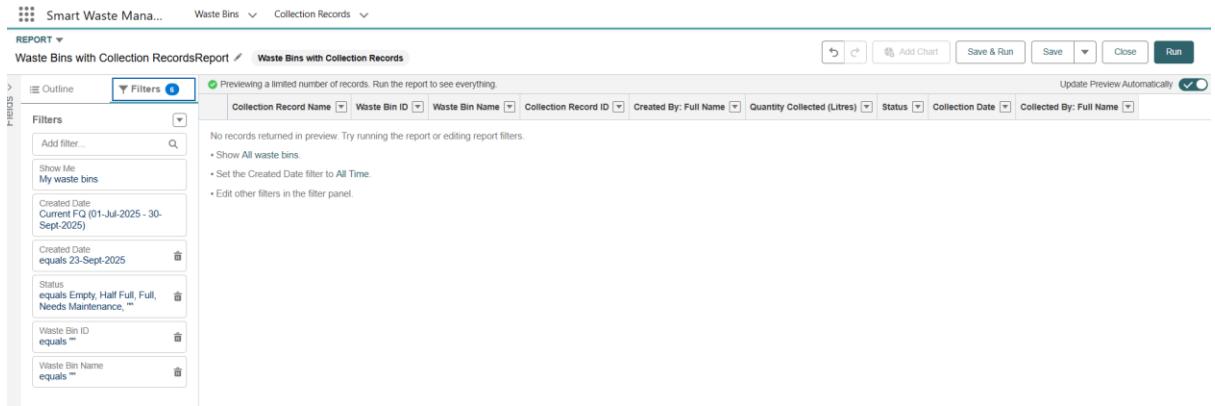
Create reports and dashboards to monitor Waste Bin status, collection quantities, and trends. Visual insights for management.

#### Step 1: Use Existing Custom Report Type

- Go to **Setup → Report Types**
- Search and open **Waste Bins with Collection Records**
- Confirm fields included:
  - Waste Bin Name
  - Status
  - Capacity
  - Collection Date
  - Quantity Collected
- Existing report type reused for Phase 7

The screenshot shows the Salesforce Setup interface with the 'Custom Report Types' page selected. The search bar at the top has 'repo' typed into it. The main area displays a list of custom report types, each with a label, name, description, category, creation date, and edit/delete icons. The 'Report Types' section in the sidebar is expanded, showing sub-options like 'Reporting Snapshots' and 'Reports and Dashboards'. The 'Analytics' section is also visible. A message at the bottom left says 'Didn't find what you're looking for? Try using Global Search.'

Label	Name	Description	Category	Created
Bot Metrics Daily Spring '24	Bot_Metrics_Daily_v6	Einstein Bot metrics aggregated by day.	Other Repor...	17/09/2025, 11:05 pm
Bot Metrics Hourly Spring '24	Bot_Metrics_Hourly_v6	Einstein Bot metrics aggregated by hour.	Other Repor...	17/09/2025, 11:05 pm
Login History for Experience Cloud Site Users	prm_total_portal_login_crt	Report on the login history of your Experience Cloud site users.	Other Repor...	17/09/2025, 11:05 pm
Orchestration Run Logs Spring '24	flow_orchestration_log_oottb_crt_two_four_eight	Find out which orchestration run logs were created and what hap...	Other Repor...	17/09/2025, 11:05 pm
Orchestration Runs Spring '24	flow_orchestration_run_oottb_crt_two_four_eight	Find out which orchestration runs were created.	Other Repor...	17/09/2025, 11:05 pm
Orchestration Stage Runs Spring '24	flow_orchestration_stage_run_oottb_crt_two_four_eight	Find out which orchestration stage runs were created and the curr...	Other Repor...	17/09/2025, 11:05 pm
Orchestration Step Runs Spring '24	flow_orchestration_step_run_oottb_crt_two_four_eight	Find out which orchestration step runs were created and the curr...	Other Repor...	17/09/2025, 11:05 pm
Orchestration Work Items Spring '24	flow_orchestration_work_item_oottb_crt_two_four_eig...	Find out which orchestration work items were created, who's the a...	Other Repor...	17/09/2025, 11:05 pm
Partner Fund Requests	prm_partner_fund_request_crt	Report on market development fund requests from partners.	Other Repor...	17/09/2025, 11:05 pm
Partner Fund Requests and Partner Fund Claims	MDF_Claim_Request_Crt	Report on market development fund requests and fund claims fro...	Other Repor...	17/09/2025, 11:05 pm
Partner Marketing Budgets	prm_partner_marketing_budget_crt	Report on your partner marketing budgets, including budget amo...	Other Repor...	17/09/2025, 11:05 pm
Program Definition Spring '24	Program_Definition_sfdcSESV60	Review your analytics with a program-like structure. See each prog...	Other Repor...	17/09/2025, 11:05 pm
Program Definition Summer '24	Program_Definition_sfdcSESV61	Review your analytics with a program-like structure. See each prog...	Other Repor...	17/09/2025, 11:05 pm
Program Item Progress Spring '24	Program_Task_Progress_sfdcSESV60	Report on tasks like exercises, milestones, and outcomes progress...	Other Repor...	17/09/2025, 11:05 pm
Program Item Progress Summer '24	Program_Task_Progress_sfdcSESV61	Report on tasks like exercises, milestones, and outcomes progress...	Other Repor...	17/09/2025, 11:05 pm



## Step 2: Create Report

- App Launcher → Reports → **New Report**
- Select Report Type: **Waste Bins with Collection Records**
- Add Columns:
  - Waste Bin Name
  - Status
  - Capacity
  - Collection Date
  - Quantity Collected
  - Collected By
- Filters: Created Date = All Time
- Run report to verify data

**Screenshot Placeholder:** Phase7\_Report\_Columns.png

*Caption: Figure 1 – Columns added to report*

**Custom Report Types**

**Waste Bins with Collection Records**

Below is the information for this custom report type. You can click the buttons on this to preview or update information for the custom report type.

**Details**

- Display Label:** Waste Bins with Collection Records
- API Name:** Waste\_Bins\_with\_Collection\_Records
- Description:** This report type allows users to view Waste Bins along with their related Collection Records, including status, location, and quantities collected.
- Created By:** Kiran kumar Thati, 9/23/25, 6:17 PM
- Store in Category:** other
- Deployment Status:** Deployed
- Modified By:** Kiran kumar Thati, 9/24/25, 9:44 PM

**Object Relationships**

Waste Bins (A) with or without related records from Collection Records (B)

A Venn diagram showing overlapping sets A and B. Below it is a diagram showing two parallel horizontal bars labeled A and B.

**REPORT**

**Waste Bins with Collection Records Report**

**Fields**

- Groups**: Add group...
- Columns**: Add column...
- Collection Record Name**
- Waste Bin ID**
- Waste Bin Name**
- Collection Record ID**
- Created By: Full Name**
- # Quantity Collected (Litres)**
- Status**
- Collection Date**
- Collected By: Full Name**

**Filters**

- Collection Record Name
- Waste Bin ID
- Waste Bin Name
- Collection Record ID
- Created By: Full Name
- Quantity Collected (Litres)
- Status
- Collection Date
- Collected By: Full Name

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

No records returned in preview. Try running the report or editing report filters.

- Show All waste bins.
- Set the Created Date filter to All Time.
- Edit other filters in the filter panel.

Update Preview Automatically

Save & Run Save Close Run

### Step 3: Save Report

- Report Name: **Phase 7 – Waste Bin Collection Report**
- Folder: Private Reports (or Public if allowed)
- Report ready for dashboard use

**Screenshot Placeholder:** Phase7\_Save\_Report.png

*Caption: Figure 2 – Report saved in Private Reports*

Smart Waste Mana... Waste Bins Collection Records

Reports Recent 1 item

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
<b>Recent</b>	Waste Bins with Collection Records Report	Shows all Waste Bins along with their related Collection Records, including quantities collected and status.	Public Reports	Kiran kumari Thati	23/9/2025, 9:17 pm	<input type="checkbox"/>

Created by Me  
Private Reports  
Public Reports  
All Reports  
FOLDERS  
All Folders  
Created by Me  
Shared with Me  
FAVORITES  
All Favorites

## Step 4: Create Dashboard

- App Launcher → Dashboards → **New Dashboard**
- Name: **Smart Waste Management Dashboard**
- Layout/Theme: Adjust as needed

**Screenshot Placeholder:** Phase7\_New\_Dashboard.png

*Caption: Figure 3 – Creating new dashboard*

Smart Waste Mana... Waste Bins Collection Records

+ Widget

New Dashboard

\*Name: Smart Waste Management Dashboard

Description

Folder: Private Dashboards

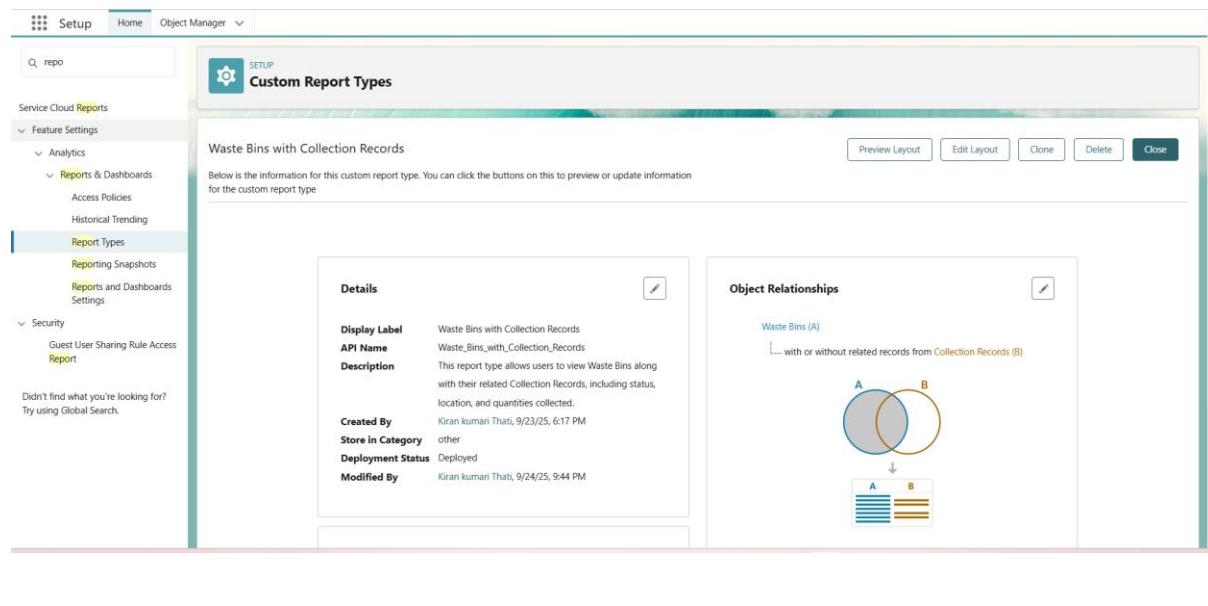
## Step 5: Add Components

- Bar Chart:**
  - X-axis: Waste Bin Name
  - Y-axis: Quantity Collected
- Pie Chart:**
  - Waste Bin Status (Full / Not Full / Needs Maintenance)

- **Table:**
  - Show latest 5 Collection Records
  - Columns: Bin Name, Collection Date, Quantity, Status
- Data Source: Phase 7 Report

**Screenshot Placeholder:** Phase7\_Dashboard\_Components.png

*Caption: Figure 4 – Components added to dashboard*

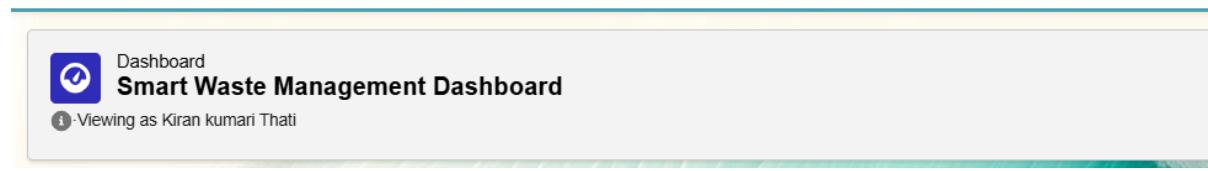


## Step 6: Save & Refresh Dashboard

- Save dashboard
- Refresh → Charts & tables should display correctly with live data

**Screenshot Placeholder:** Phase7\_Refresh\_Dashboard.png

*Caption: Figure 5 – Dashboard refreshed with live data*



## Step 7: Share Dashboard

- Open dashboard → Click **Share**
- Assign access to:
  - Collection Manager Role

- Public Group (if applicable)
- Verify visibility by logging in as another user (optional)

**Screenshot Placeholder:** Phase7\_Share\_Dashboard.png

*Caption: Figure 6 – Dashboard shared with roles*

---

### **Step 8: Optional Testing**

- Add sample Collection Records
- Confirm report & dashboard update dynamically
- Fix any missing fields or filter issues

**Screenshot Placeholder:** Phase7\_Testing.png

*Caption: Figure 7 – Dashboard tested with sample data*

---

### **Expected Outcome**

- Reports display Waste Bin status, quantities collected, and collection trends
- Dashboard visualizes data for quick management insights
- Authorized users can view dashboard