

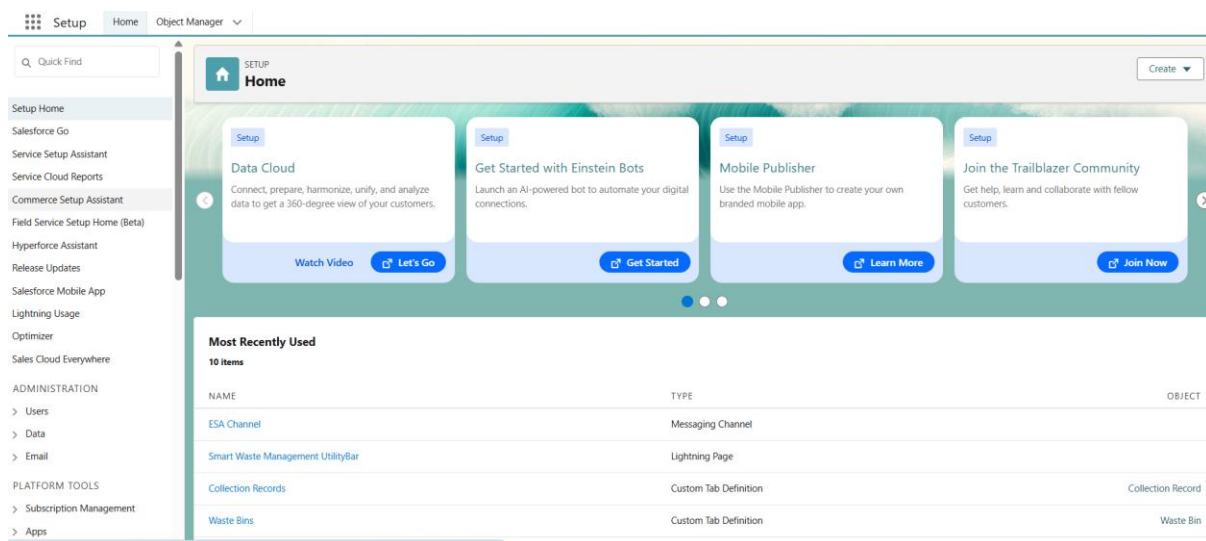
Smart Waste Management Tracker – Salesforce Project

Phase 5: Reports & Dashboards

Step 1: Goal of Phase 5

- Generate reports for Waste Management data.
- Analyze WasteBin__c and CollectionRecord__c records.
- Prepare dashboards and summary charts for quick insights.

Expected Outcome: Reports created to monitor collection status, quantities collected, and bin status.



Step 2: Use Standard Report Types

1. Go to **App Launcher** → **Reports** → **New Report**.
2. In the **Search Report Types**, type:
 - Collection Records
 - Waste Bins
3. Select the standard report type:
 - Example: **Waste Bins with Collection Records**
4. Click **Continue**.

Setup Home Object Manager

Q report

Service Cloud Reports

Feature Settings

Analytics

Reports & Dashboards

Access Policies

Historical Trending

Report Types

Reporting Snapshots

Reports and Dashboards Settings

Security

Guest User Sharing Rule Access Report

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

Custom Report Types

New Custom Report Type

2 Define Report Records Set

Select related objects to define which records are included in reports using this report type.

A Waste Bins
Primary Object

B Collection Records details

A to B Relationship:

☒ Each "A" record must have at least one related "B" record.

☐ "A" records may or may not have related "B" records.

Previous Cancel Save

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Custom Report Types

Waste Bins with Collection Records

Preview Layout Edit Layout Clone Delete Close

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 kumari Thati, 9/23/25, 6:17 PM

Store in Category other

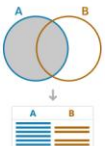
Deployment Status Deployed

Modified By Kiran kumari Thati, 9/23/25, 6:17 PM

Object Relationships

Waste Bins (A)

... with or without related records from Collection Records (B)



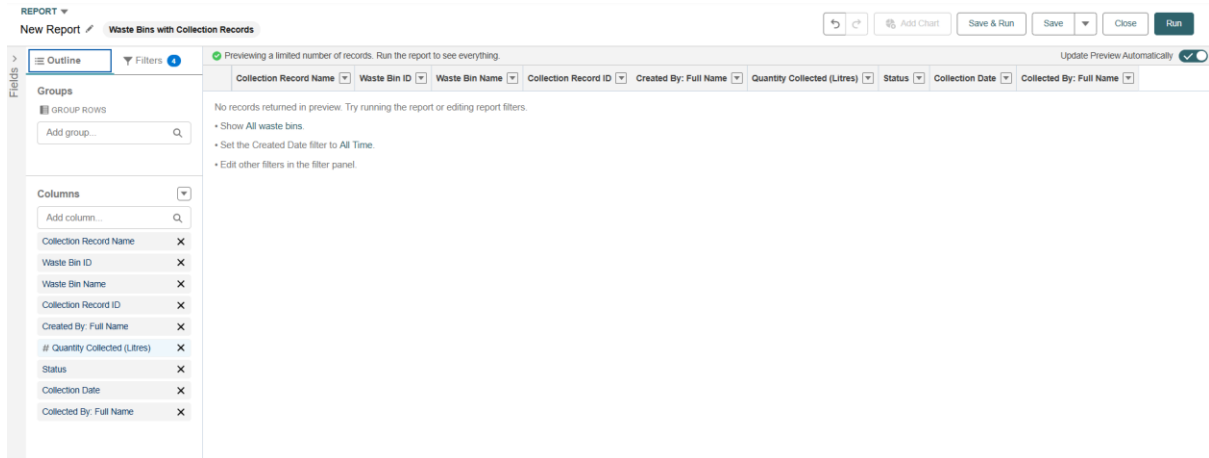
Step 3: Add Fields to Report

- Include the following columns in the report:
 - Waste Bin Name
 - Collection Record Name
 - Quantity Collected
 - Status
 - Collected By
 - Collection Date
- Set **filters**:
 - Created Date = All Time

- Status = All

Screenshot Placeholder: Phase5_AddFields.png

Caption: Figure 1: Adding fields and filters to report

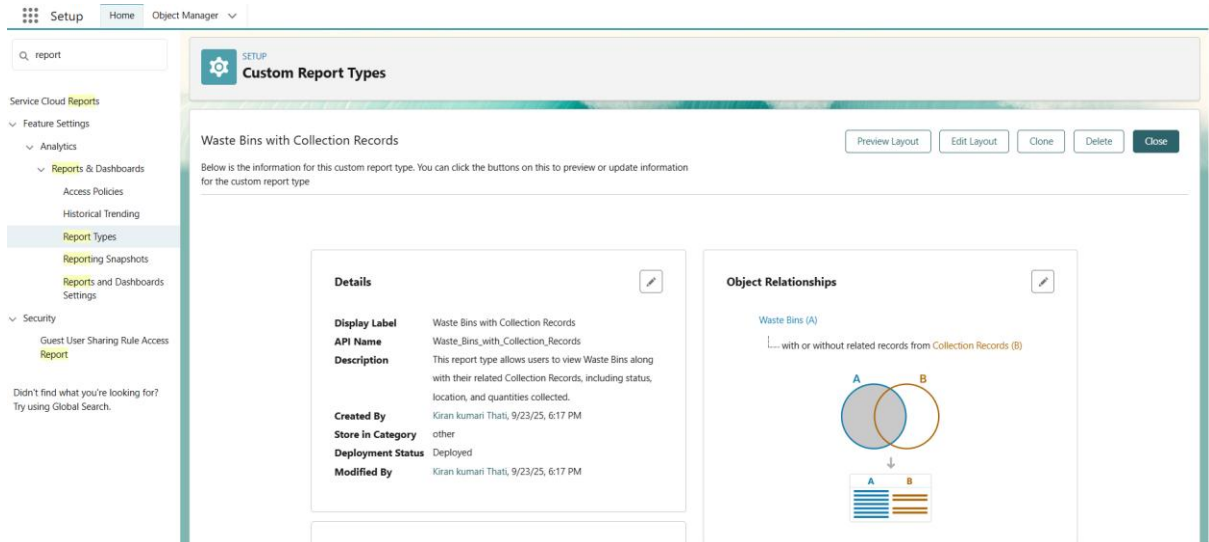


Step 4: Group Records (Optional)

- **Group Rows by:** Waste Bin Name → To see all collections for each bin.
- Add **columns** if needed (optional).

Screenshot Placeholder: Phase5_GroupRows.png

Caption: Figure 2: Grouping report rows by Waste Bin



Report: Waste Bins with Collection Records

Waste Bins with Collection RecordsReport

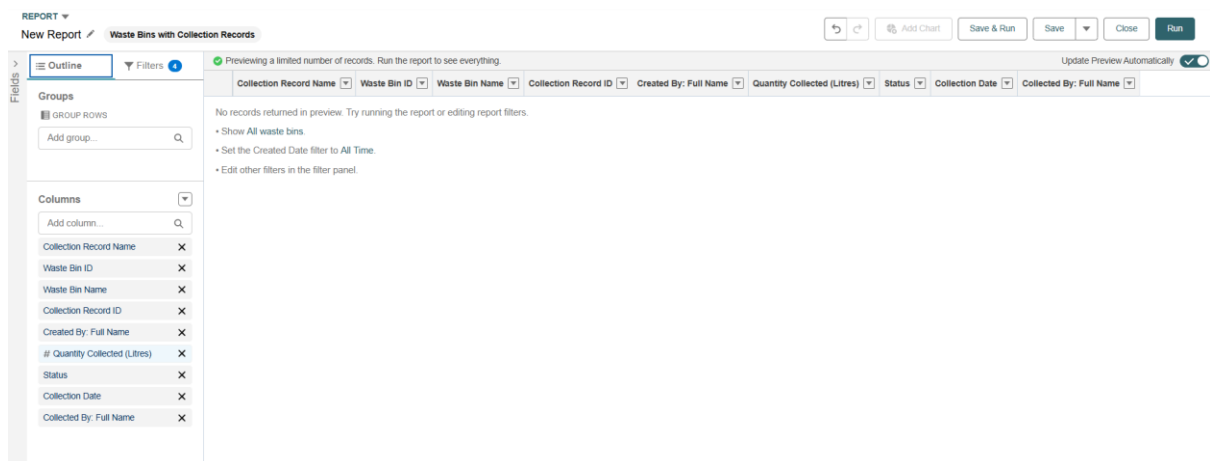
Shows all Waste Bins along with their related Collection Records, including quantities collected and status.

Step 5: Run & Save Report

- Click **Run** to preview the report.
- Click **Save**:
 - Report Name: Waste Bins with Collection Records Report
 - Folder: Private Reports (or Public if allowed)

Screenshot Placeholder: Phase5_RunSaveReport.png

Caption: Figure 3: Running and saving report



Step 6: Create Dashboards (Optional)

- Use saved reports as data source for dashboards.
- Example components:
 - Bar chart → Total Quantity Collected per Waste Bin
 - Pie chart → Waste Bin status distribution

Screenshot Placeholder: Phase5_Dashboard.png

Caption: Figure 4: Sample dashboard for Waste Management

Step 7: Expected Outcome (Phase 5 Completion)

- Reports created to view WasteBin__c and CollectionRecord__c data.
- Filters and groupings applied for easy analysis.
- Dashboards can visualize collection data and bin status trends.

Screenshot Placeholder: Phase5_ExpectedOutcome.png

Caption: Figure 5: Phase 5 completed – reports ready for analysis



Report: Waste Bins with Collection Records

Waste Bins with Collection RecordsReport

Shows all Waste Bins along with their related Collection Records, including quantities collected and status.