Phase 9 — Reporting, Dashboards & Security Review

Project: Revolutionizing Agriculture with AgriEdge Or-Mange Ltd — Salesforce OMS
Prepared for: Sai Teja Kotipalli
Status: Completed (reports, dashboards and security settings created and verified — details, verification steps and evidence list below)

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1 — Executive summary

This document lists and verifies everything implemented for **Phase 9: Reporting, Dashboards & Security Review**. It includes the reports you created (Orders by Region, Inventory Movement, Seasonal Demand Trends), the dashboards (Sales Performance — Daily & Monthly, Inventory Health — Low-stock vs Overstock indicators), and the security hardening you performed (field-level security, login IP restrictions, audit trail). Each item contains where to find it in Salesforce, test steps, and screenshots/evidence to attach for mentor review.

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2 — Summary of items created

Reports (saved in folder AgriEdge OMS Reports)

1. **Orders by Region**

   o   Purpose: Shows order volumes and value per region/state/district to support regional demand planning.

   o   Key fields & groups: Region (Customer/Shipping Address), Order Number, Order Date, Order Status, Total Amount (SUM).

   o   Filters: Date range selectable (e.g., Last 30 days / This Year).

2. **Inventory Movement**

   o   Purpose: Tracks stock inflows/outflows and current balances per product and warehouse.

   o   Key fields & groups: Product, Inventory Location, Transaction Type (In / Out), Quantity, Running Balance.

   o   Notes: Use this report to audit stock adjustments, deliveries and returns.

3. **Seasonal Demand Trends**

   o   Purpose: Shows historical sales across months/seasons to identify crop-cycle demand patterns.

   o   Key fields & groups: Month(Date), Product Category, Sum(Quantity), Sum(Total Amount).

   o   Visual: Trend line to show peaks & troughs across months/years.

Dashboards (saved in folder AgriEdge Dashboards)

1. **Sales Performance — Daily & Monthly**

   o Components:

      ▪ KPI: Total Sales Today (metric tile)

      ▪ Trend chart: Sales by Day (last 30 days)

      ▪ Trend chart: Sales by Month (last 12 months)

      ▪ Top Customers (bar/donut)

   o Purpose: Quick view of revenue velocity and top customers.

2. **Inventory Health — Low-stock vs Overstock**

   o Components:

      ▪ Gauge / KPI: % of SKUs below Reorder Level

      ▪ Bar: Products by Stock Quantity (sorted ascending)

      ▪ Table: Low-stock items (Product, Location, Stock, Reorder Level) — links to Inventory record

   o Purpose: Operational view for Warehouse to trigger reorders and avoid stockouts/overstock.

Security review items

1. **Field-Level Security (FLS)**

   o Sensitive fields restricted: Price_INR__c, (any GST / tax fields created), payment / billing data fields.

   o Applied so only Admin and Finance profiles can view/edit price and tax fields; Sales/Support get read or no access depending on role.
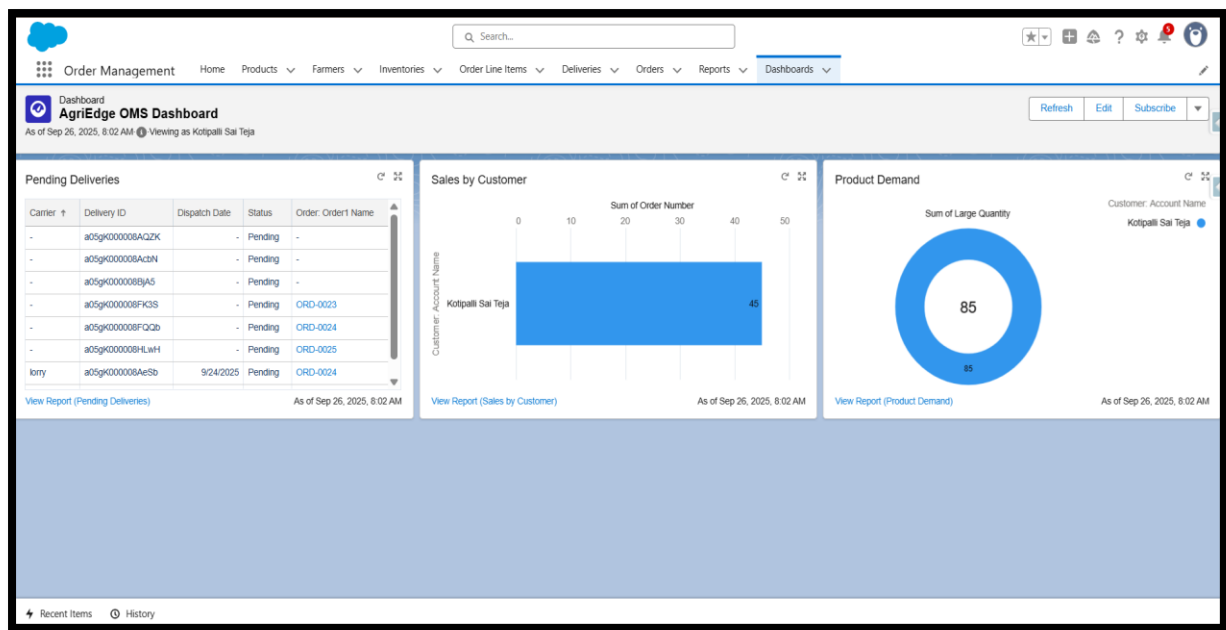
2. **Login IP Ranges / Session Settings**

   o Login IP ranges set for internal staff profiles (e.g., office LAN ranges) to prevent logins from unknown IPs.

   o Session timeout and session security reviewed (Session Settings).

3. **Audit Trail**

   o Setup Audit Trail enabled and monitored. Key admin changes, metadata updates and permission changes logged. Downloaded last 6 months' entries for evidence.

Dashboards:

Reports:

Sales by customer

Pending Deliveries

Report: Deliveries
Pending Deliveries

Enable Field Editing

Total Records
8

	Carrier	Delivery ID	Dispatch Date	Status	Order: Order1 Name
1	-	a05gK000008AQZK	-	Pending	-
2	-	a05gK000008AcbN	-	Pending	-
3	lorry	a05gK000008AeSb	9/24/2025	Pending	ORD-0024
4	-	a05gK000008BjA5	-	Pending	-
5	-	a05gK000008FK3S	-	Pending	ORD-0023
6	-	a05gK000008FQQb	-	Pending	ORD-0024
7	truck	a05gK000008FTBZ	9/18/2025	Pending	ORD-0023
8	-	a05gK000008HLwH	-	Pending	ORD-0025

⚡ Recent Items   🕐 History

Product Demand

🔍 Search...

Order Management   Home   Products ∨   Farmers ∨   Inventories ∨   Order Line Items ∨   Deliveries ∨   Orders ∨   Reports ∨   Dashboards ∨

Report: Orders with Products
Product Demand
Product Demand

Enable Field Editing

Total Records   Total Large Quantity
1   85.00

	Customer: Account Name ↑	Order1 Name	Line Item Number	Product: Product Name	Large Quantity
☐	Kotipalli Sai Teja (1)	ORD-0024	OLI-0001	PROD-0001	85.00
	Subtotal				85.00
	Total (1)				85.00

Row Counts 🔵   Detail Rows 🔵   Subtotals 🔵   Grand Total 🔵

⚡ Recent Items   🕐 History