

Phase 5 — Reporting, Dashboards & Security Review

Project: Revolutionizing Agriculture with AgriEdge Or-Mange Ltd — Salesforce OMS

Prepared for: Sai Teja Kotipalli

Status: Completed (document prepared and verified against the reports & dashboard you built)

1. Executive summary

This document captures everything created for **Phase 5: Reporting, Dashboards & Security Review**. It lists the custom report type, reports, dashboard components, verification steps, test cases, and security notes (report folder access and permissions). Use this as the upload-ready deliverable for your mentor.

2. Summary of items created

- **Custom Report Type**
 - **Orders with Products** (Order → Order Items → Product) — *Deployed*
 - **Deliveries** (Deliveries → Orders) — *in Development*
 - **Reports**
 1. **Sales by Customer** — groups orders by Customer and shows sum of order totals
 2. **Product Demand** — groups by Product and shows total quantity sold
 3. **Pending Deliveries** — lists deliveries whose status = Pending
 - **Dashboard**
 - **AgriEdge OMS Dashboard** (saved dashboard with 3 components)
 - Component 1: **Donut chart** — *Sales by Customer* (top customers by sales)
 - Component 2: **Bar chart** — *Product Demand* (products vs quantity)
 - Component 3: **Table** — *Pending Deliveries* (deliveries not yet completed)
 - **Security / Access items reviewed**
 - Report folder created (or recommended): **AgriEdge Reports** — ensure appropriate folder sharing.
 - Dashboard folder: **AgriEdge Dashboards** — ensure folder sharing & Run As settings.
 - Confirmed users/profiles with “Run Reports” permission and access to the folder.
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3. Details & exact locations (where to find items)

3.1 Custom Report Type

- **Name:** Orders with Products

- **Setup Path:** Setup → Feature Settings → Analytics → Report Types → Orders with Products
- **Primary Object:** Order
- **Related Objects:** Order Line Items (may or may not have), Product
- **Deployment:** Deployed (so report builder can use it)

Custom Report Types

Orders with Products

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

Orders with Products

API Name

Orders_with_Products

Description

Report on Orders and their related Products.

Created By

Kotipalli Sai Teja, 9/24/25, 11:02 AM

Store in Category

busop

Deployment Status

Deployed

Modified By

Kotipalli Sai Teja, 9/24/25, 11:09 AM

Fields

Source Object	Included Fields
Orders	24
Order Line Items	12
Products	0

Object Relationships

Orders (A)

with at least one related record from Order Line Items (B)

with at least one related record from Products (C)

- **Name:** Deliveries

Custom Report Types

Deliveries

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

Deliveries

API Name

Deliveries

Description

delivery status

Created By

Kotipalli Sai Teja, 9/25/25, 11:24 AM

Store in Category

cases

Deployment Status

In Development

Modified By

Kotipalli Sai Teja, 9/25/25, 11:24 AM

Fields

Source Object	Included Fields
Deliveries	14
Orders	23

Object Relationships

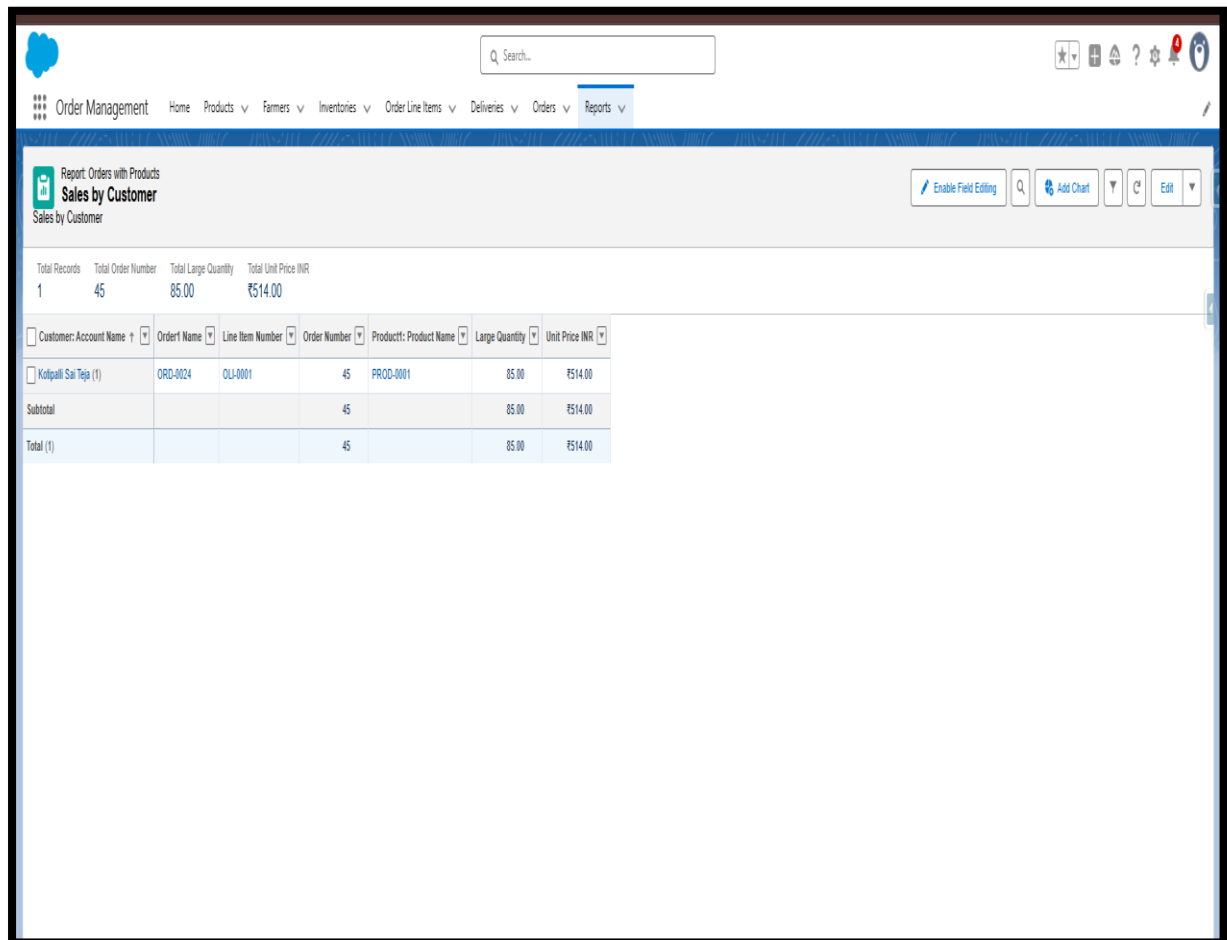
Deliveries (A)

with at least one related record from Orders (B)

3.2 Reports

- **Sales by Customer**

- **Path:** App Launcher → Reports → Open *Sales by Customer*
- **Source Report Type:** Orders with Products
- **Key fields:** Customer Name, Order Number, Product Name, Quantity, Line Total / Order Total (summarized)
- **Grouping:** Group by Customer Name; Summary = SUM(Total Price)



Report: Orders with Products
Sales by Customer
Sales by Customer

Enable Field Editing Add Chart Edit

Total Records	Total Order Number	Total Large Quantity	Total Unit Price INR
1	45	85.00	₹514.00

Customer: Account Name	Order Name	Line Item Number	Order Number	Product: Product Name	Large Quantity	Unit Price INR
Kodipati Sai Teja (Y)	ORD-0024	OLI-0001	45	PROD-0001	85.00	₹514.00
Subtotal			45		85.00	₹514.00
Total (1)			45		85.00	₹514.00

- **Product Demand**

- **Path:** Reports → *Product Demand*
- **Source Report Type:** Orders with Products
- **Key fields:** Product Name, Quantity
- **Grouping:** Group by Product Name; Summary = SUM(Quantity)

<div> <div>Order Management</div> <div> <div>Home</div> <div>Products</div> <div>Farmers</div> <div>Inventories</div> <div>Order Line Items</div> <div>Deliveries</div> <div>Orders</div> <div>Reports</div> </div> </div>				
<div> <div>Report: Orders with Products</div> <div>Product Demand</div> <div>Product Demand</div> <div> <div>Enable Field Editing</div> <div>Add Chart</div> <div>▼</div> <div>⌂</div> <div>Edit</div> </div> </div>				
<div> <div>Total Records</div> <div>Total Large Quantity</div> <div>1</div> <div>85.00</div> </div>				
<div> <div>Customer: Account Name</div> <div>Order1 Name</div> <div>Line Item Number</div> <div>Product: Product Name</div> <div>Large Quantity</div> </div>				
<div> <div>Kotipalli Sai Teja (1)</div> <div>ORD-0024</div> <div>OLI-0001</div> <div>PROD-0001</div> <div>85.00</div> </div>				
<div> <div>Subtotal</div> <div></div> <div></div> <div></div> <div>85.00</div> </div>				
<div> <div>Total (1)</div> <div></div> <div></div> <div></div> <div>85.00</div> </div>				

• Pending Deliveries

- **Path:** Reports → *Pending Deliveries*
- **Source Report Type:** Deliveries (standard/custom object)
- **Filters:** Status = Pending
- **Columns:** Delivery Date, Vehicle, Status, Order Number

Order Management

Home

Products

Farmers

Inventories

Order Line Items

Deliveries

Orders

Reports

Dashboards

Search...

Report: Deliveries

Pending Deliveries

Enable Field Editing

Add Chart

Edit

Total Records

7

	Carrier	Delivery ID	Dispatch Date	Status	Order: Order1 Name
1	-	at5gk000008AGZK	-	Pending	-
2	-	at5gk000008AclM	-	Pending	-
3	lorry	at5gk000008AeSb	9/24/2025	Pending	ORD-0024
4	-	at5gk000008BjAS	-	Pending	-
5	-	at5gk000008FK3S	-	Pending	ORD-0023
6	-	at5gk000008FGQb	-	Pending	ORD-0024
7	truck	at5gk000008FTBZ	9/18/2025	Pending	ORD-0023

3.3 Dashboard — AgriEdge OMS Dashboard

- **Path:** App Launcher → Dashboards → *AgriEdge OMS Dashboard*
- **Components:**
 - Donut: *Sales by Customer* (top customers)
 - Bar: *Product Demand* (product vs quantity)
 - Table: *Pending Deliveries* (list view)

