

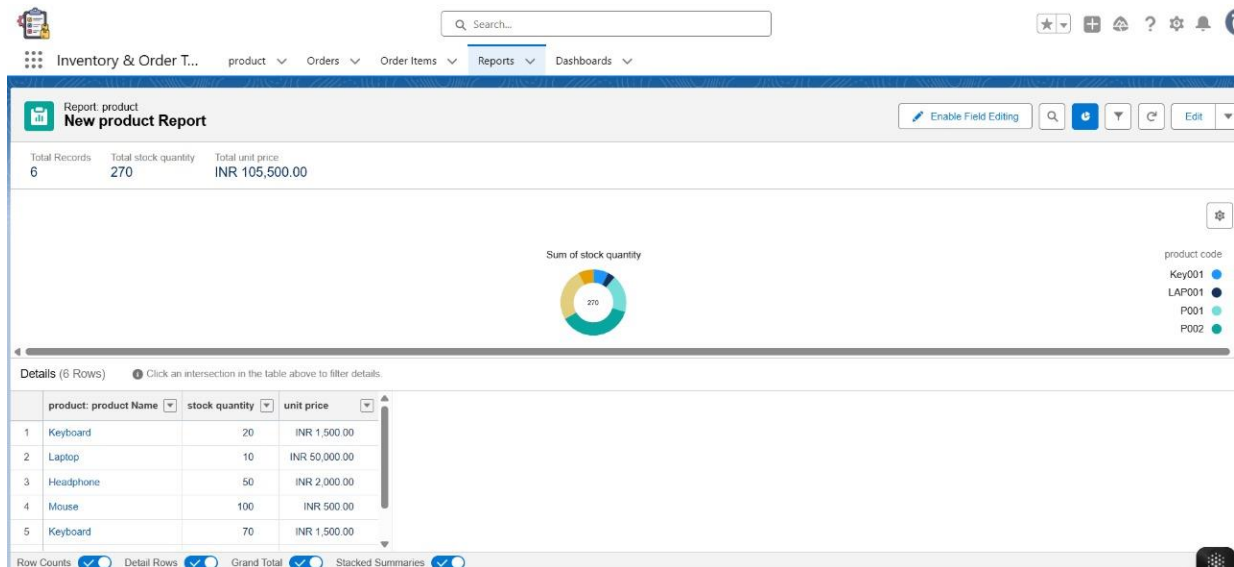
# INVENTORY AND ORDER TRACKING DASHBOARD

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## PHASE-09: Reporting, Dashboards & Security Review

### 1. Reports (Tabular, Summary, Matrix, Joined)

- Purpose: Display Salesforce data in organized ways.
- Steps:
  - Go to Reports → New Report.
  - Select the object (e.g., Product\_c, Order\_c).
- Choose report format:
  - Tabular: Simple list of records.
  - Summary: Group by fields (e.g., Customer Name).
  - Matrix: Cross-tab format (e.g., Product by Category).
  - Joined: Combine multiple reports side by side.
  - Add filters, e.g., Status = Pending.
  - Save & Run.



## 2. Custom Report Type (Optional but Recommended)

- Goal: Show Orders with their Products in one report.
- Setup → Report Types → New Custom Report Type.
  - Primary Object: Orders
  - Related Object: Order Items
  - Save and deploy.

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** Shows Orders along with associated Products  
**Created By** T N KUSHAL, 9/26/25, 12:28 AM  
**Store in Cate...** other  
**Deployment ...** Deployed  
**Modified By** T N KUSHAL, 9/26/25, 12:28 AM

**Object Relationships**

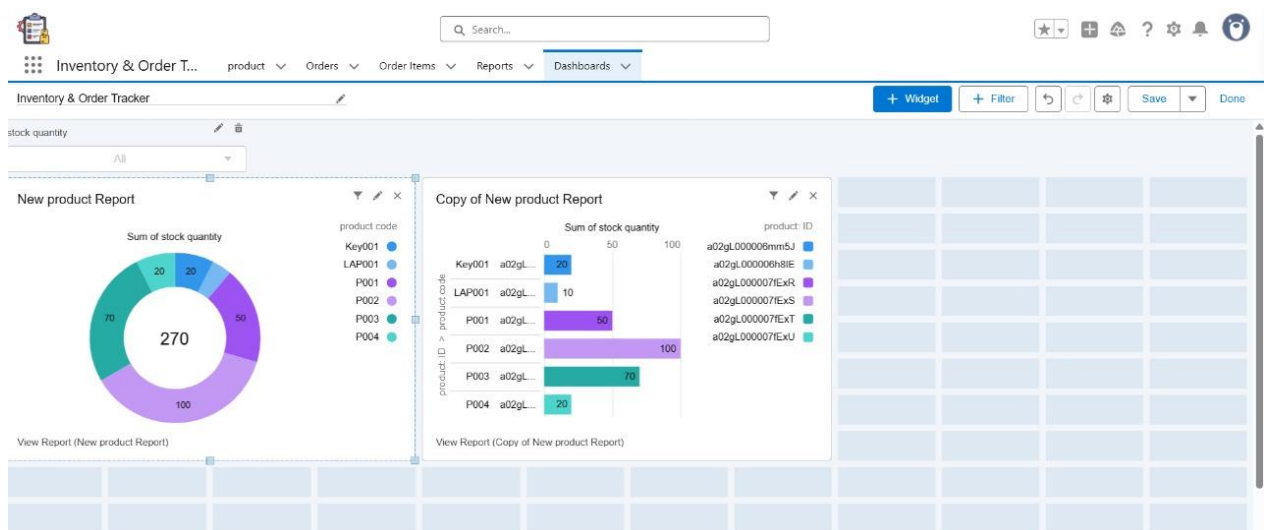
Orders (A)  
... with at least one related record from Order Items (B)

**Fields**

Source Object	Included Fields
Orders	12
Order Items	12

### 3. Dashboards

- Goal: Visual summary of inventory and orders.
  - Go to Dashboards → New Dashboard.
  - Name it: Inventory & Orders Dashboard.
- Add Components:
  - Bar chart: stock quantity
  - Pie chart: stock quantity



### 4. Field-Level Security

- Goal: Restrict sensitive fields.
- Setup → Object Manager → Product\_\_c → Fields → Stock Quantity → Set Field-Level Security.
- Make visible only to Admin profile.

Setup Home Object Manager

Quick Find

up Home  
tsforce Go  
vice Setup Assistant  
nmerce Setup Assistant  
d Service Setup Home (Beta)  
erforce Assistant  
ase Updates  
tsforce Mobile App  
tning Usage  
imizer  
s Cloud Everywhere  
MINISTRATION  
Users

Set Field-Level Security  
**stock quantity**

Save Cancel

Field Label	stock quantity
Data Type	Number(18, 0)
Field-Level Security for Profile	
	<input type="checkbox"/> Visible <input type="checkbox"/> Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>

## 5. Sharing Settings

- Goal: Limit data visibility.
- Setup → Sharing Settings.
- Set Order\_\_c as Private.
- Create a sharing rule: Share Pending Orders with Sales Team.

Sharing Settings

Security

Sharing Settings

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

SETUP Sharing Settings

Help for this Page

Manage sharing settings for: order

Disable External Sharing Model

Default Sharing Settings

Organization-Wide Defaults Edit Organization-Wide Defaults Help

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
order	Public Read/Write	Private	<input checked="" type="checkbox"/>

Other Settings Other Settings Help