# INVENTORY AND ORDER TRACKING DASHBOARD

PHASE-09: Reporting, Dashboards & Security Review

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

- Purpose: Display Salesforce data in organized ways.

- Steps:

  o Go to Reports → New Report.

  o Select the object (e.g., Product_c, Order_c).

- Choose report format:

  o Tabular: Simple list of records.

  o Summary: Group by fields (e.g., Customer Name).

  o Matrix: Cross-tab format (e.g., Product by Category).

  o Joined: Combine multiple reports side by side.

  o Add filters, e.g., Status = Pending.

  o Save & Run.
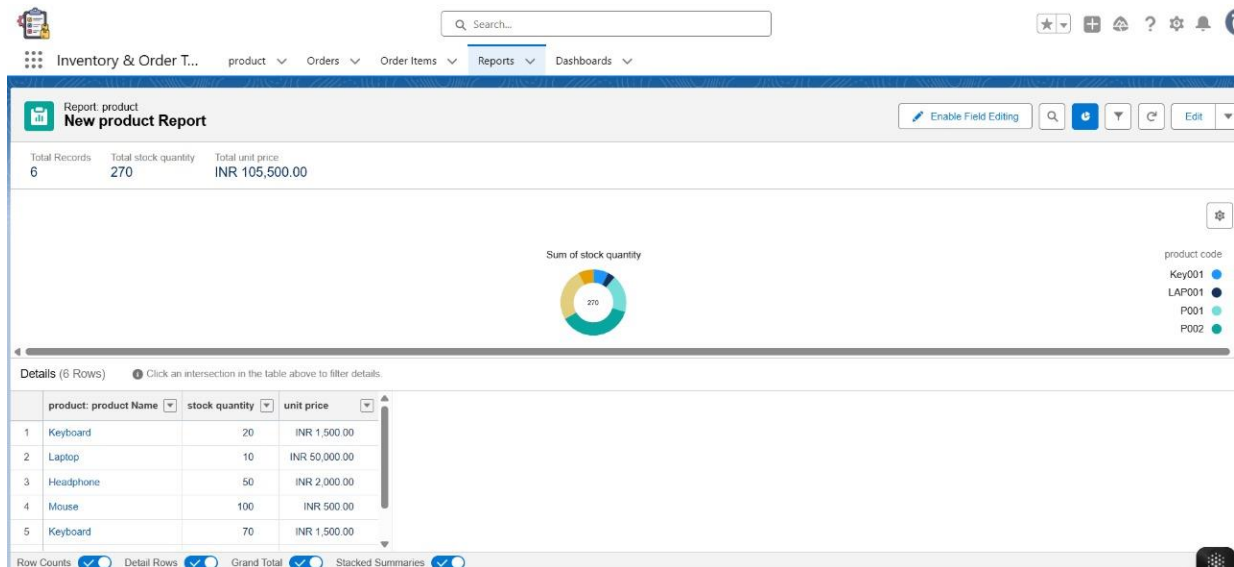
2. Custom Report Type (Optional but Recommended)

- Goal: Show Orders with their Products in one report.

- Setup → Report Types → New Custom Report Type.

  o Primary Object: Orders

  o Related Object: Order Items

  o Save and deploy.

3. Dashboards

- Goal: Visual summary of inventory and orders.

  o Go to Dashboards → New Dashboard.

  o Name it: Inventory & Orders Dashboard.

- Add Components:

  o Bar chart: stock quantity

  o Pie chart: stock quantity
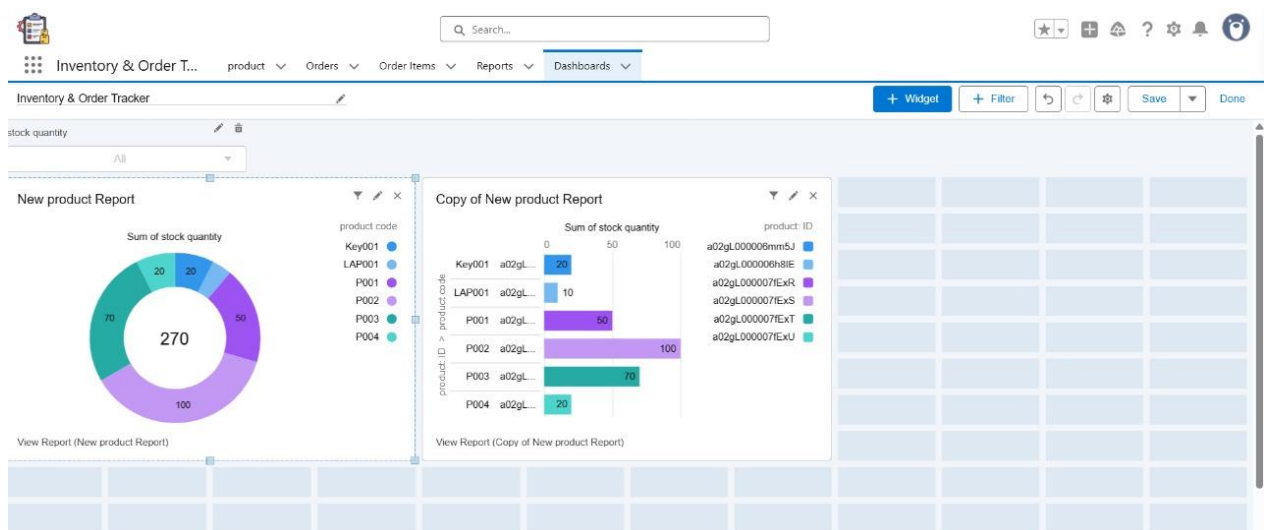
4. Field-Level Security

- Goal: Restrict sensitive fields.

- Setup → Object Manager → Product__c → Fields → Stock Quantity → Set Field-Level Security.

- Make visible only to Admin profile.

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.