

Phase 9 — Reporting, Dashboards & Security Review

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

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Status: Completed (reports, dashboards and security settings created and verified — details, verification steps and evidence list below)

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.

2 — Summary of items created

Reports (saved in folder AgriEdge OMS Reports)

1. Orders by Region

- Purpose: Shows order volumes and value per region/state/district to support regional demand planning.
- Key fields & groups: Region (Customer/Shipping Address), Order Number, Order Date, Order Status, Total Amount (SUM).
- Filters: Date range selectable (e.g., Last 30 days / This Year).

2. Inventory Movement

- Purpose: Tracks stock inflows/outflows and current balances per product and warehouse.
- Key fields & groups: Product, Inventory Location, Transaction Type (In / Out), Quantity, Running Balance.
- Notes: Use this report to audit stock adjustments, deliveries and returns.

3. Seasonal Demand Trends

- Purpose: Shows historical sales across months/seasons to identify crop-cycle demand patterns.
 - Key fields & groups: Month(Date), Product Category, Sum(Quantity), Sum(Total Amount).
 - Visual: Trend line to show peaks & troughs across months/years.
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Dashboards (saved in folder AgriEdge Dashboards)

1. Sales Performance — Daily & Monthly

- 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)
- Purpose: Quick view of revenue velocity and top customers.

2. Inventory Health — Low-stock vs Overstock

- 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
 - Purpose: Operational view for Warehouse to trigger reorders and avoid stockouts/overstock.
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Security review items

1. Field-Level Security (FLS)

- Sensitive fields restricted: Price_INR_c, (any GST / tax fields created), payment / billing data fields.
- Applied so only Admin and Finance profiles can view/edit price and tax fields; Sales/Support get read or no access depending on role.

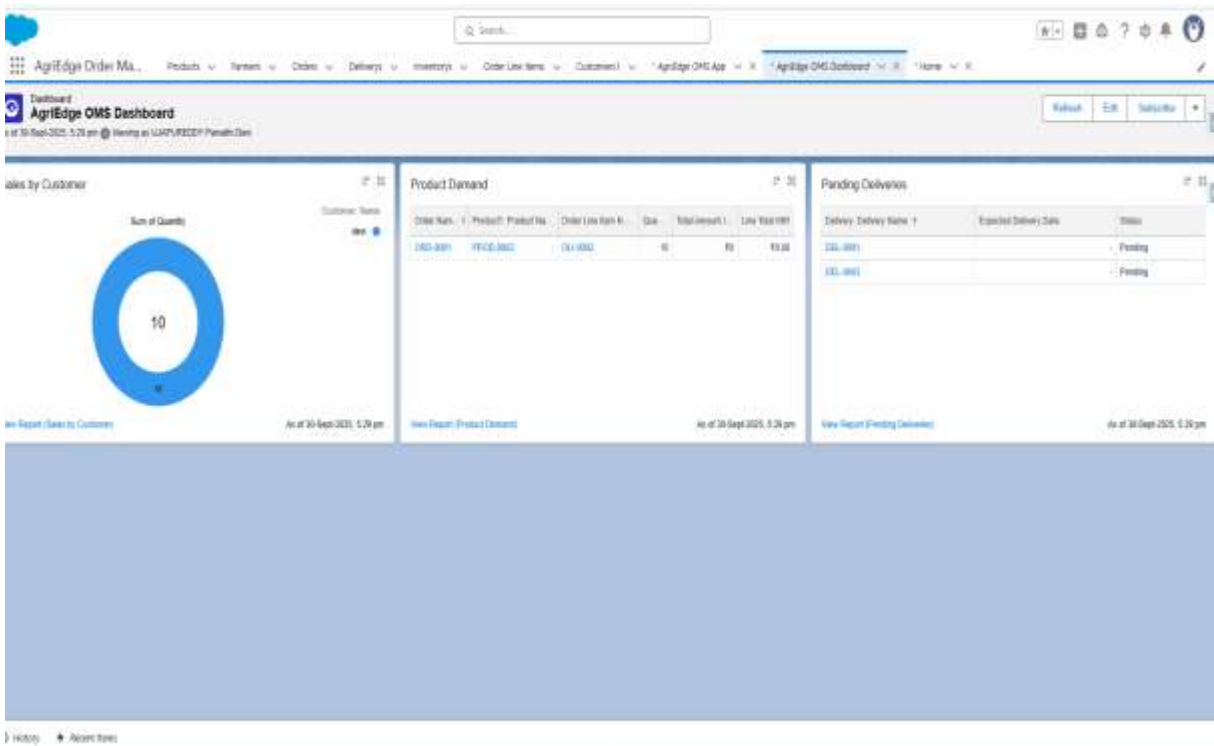
2. Login IP Ranges / Session Settings

- Login IP ranges set for internal staff profiles (e.g., office LAN ranges) to prevent logins from unknown IPs.
- Session timeout and session security reviewed (Session Settings).

3. Audit Trail

- 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

The screenshot shows the AgriEdge OMS Report: Orders with Products Sales by Customer. The report is displayed in a table format with the following columns: Customer Name, Order Name, Order ID, Product, Product Name, Quantity, and Unit Price (INR). The data shows a single order for Customer 001-0001, Order Name 001-0001, Order ID 001-0001, Product PROD-0002, Product Name PROD-0002, Quantity 10, and Unit Price 70 INR. The report also includes a summary table at the bottom showing the total quantity and total price for the order.

Customer Name	Order Name	Order ID	Product	Product Name	Quantity	Unit Price (INR)
001-0001	001-0001	001-0001	PROD-0002	PROD-0002	10	70
Subtotal					10	70
Total (1)					10	70

The report also includes a summary table at the bottom showing the total quantity and total price for the order.

Total Records	Total Quantity	Total Unit Price (INR)
1	10	70

Pending Deliveries

The screenshot shows the 'Pending Deliveries' report interface. At the top, there's a search bar and a navigation menu with options like Products, Items, Orders, Deliveries, Inventory, Order Line Items, Customers, AgrEdge CMS App, AgrEdge CMS Dashboard, Home, and Pending Deliveries. The report title 'Report Deliveries Pending Deliveries' is displayed. Below the title, there's a 'Total Records' section showing '2'. The main data table has columns: Delivery, Delivery Name, Expected Delivery Date, and Status. It contains two rows of pending deliveries.

	Delivery	Delivery Name	Expected Delivery Date	Status
1	DL1-0000			Pending
2	DL1-0000			Pending

Product Demand

The screenshot shows the 'Product Demand' report interface. It features a search bar, a navigation menu, and a report title 'Report Orders with Products Product Demand'. The 'Total Records' section indicates '5'. The data table includes columns for Order Name, Product, Product Name, Order Line Item Name, and Quantity. One record is visible, showing a product with a quantity of 10.

	Order Name	Product	Product Name	Order Line Item Name	Quantity
1	ORD1-0001	PR01-0000	DL1-0000		10