

Project Title: Smart Pharmacy Inventory Tracker

PHASE 9: Reporting, Dashboards & Security Review

Executive Summary:

Phase 9 focused on converting the data collected in the Smart Pharmacy application into meaningful insights through Reports and Dashboards, while also conducting a Security Review to protect sensitive information such as medicine stock levels, supplier details, and reorder requests.

The goal was to empower pharmacy managers with real-time analytics for better decision-making, while ensuring the system follows Salesforce's best security practices.

Reports (Tabular, Summary, Matrix, Joined):

Purpose/Rationale: To visualize pharmacy data for inventory tracking, supplier performance, and order management.

Detailed Implementation:

- Tabular Report → “*All Medicines Inventory*”
 - Simple list of all Medicine__c records with fields (Name, Quantity, Reorder Level, Expiry Date).
 - Useful for quick exports and audits.
- Summary Report → “*Medicines by Category*”
 - Grouped by Category__c.
 - Shows subtotals of stock in each category (e.g., OTC, Prescription).
 - Helps managers understand distribution of medicines.
- Matrix Report → “*Reorder Requests by Supplier and Status*”
 - Rows = Supplier, Columns = Request Status.
 - Values = COUNT of Reorder_Request__c.
 - Helps evaluate supplier responsiveness.
- Joined Report → “*Supplier Workload & Medicine Inventory*”
 - Block 1: Suppliers and related contact information.
 - Block 2: Medicines supplied by them with current stock.

Report Types:

Purpose/Rationale: Standard report types couldn't show medicines that don't have reorder requests yet.

Implementation:

- Custom Report Type: “*Medicines with or without Reorder Requests*”

 - Primary Object: Medicine__c
 - Secondary Object: Reorder_Request__c
 - Relationship: "A records may or may not have related B records".
 - Result: Identifies medicines that need restocking but no reorder request has been raised.

Dashboards:

Purpose/Rationale: Provide pharmacy owners a visual overview of inventory health.

Detailed Implementation:

- Gauge: “Overall Stock Fulfillment (%)” → % of medicines above reorder level.
- Bar Chart: “Medicines by Category” (from Summary Report).
- Lightning Table: “Top 5 Expiring Medicines” (Expiry_Date__c within next 30 days).
- Donut Chart: “Reorder Requests by Status” (Pending, Approved, Rejected).

New Medicines with Supplier Report

We can't draw this chart because there is no data.

View Report (New Medicines with Supplier Report)

quickReorder

🤝 Sharing Settings:

Purpose/Rationale: Protect sensitive medicine and supplier information.

Implementation:

- OWD:
 - Medicine__c = Private.
 - Supplier__c = Private.
- Sharing Rule Example:
 - Criteria: If Category__c = 'Prescription', share with Public Group "Pharmacists" (Read Only).

sharing setting

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

Object	Sharing Rule	Access Level	Controlled By
Shipping Configuration Set	Public Read Only	Private	
Streaming Channel	Public Read/Write	Private	
Tableau Host Mapping	Public Read Only	Private	
User Presence	Public Read Only	Private	
User Provisioning Request	Private	Private	
Waitlist	Private	Private	
Web Cart Document	Private	Private	
Work Order	Private	Private	
Work Plan	Private	Private	
Work Plan Template	Private	Private	
Work Step Template	Private	Private	
Work Type	Private	Private	
Work Type Group	Public Read/Write	Private	
Medicine	Public Read/Write	Private	
Mentor	Public Read/Write	Private	
Order	Public Read/Write	Private	
Order_Item	Controlled by Parent	Controlled by Parent	
Reorder Request	Public Read/Write	Private	
Student	Controlled by Parent	Controlled by Parent	
Supplier	Public Read/Write	Private	

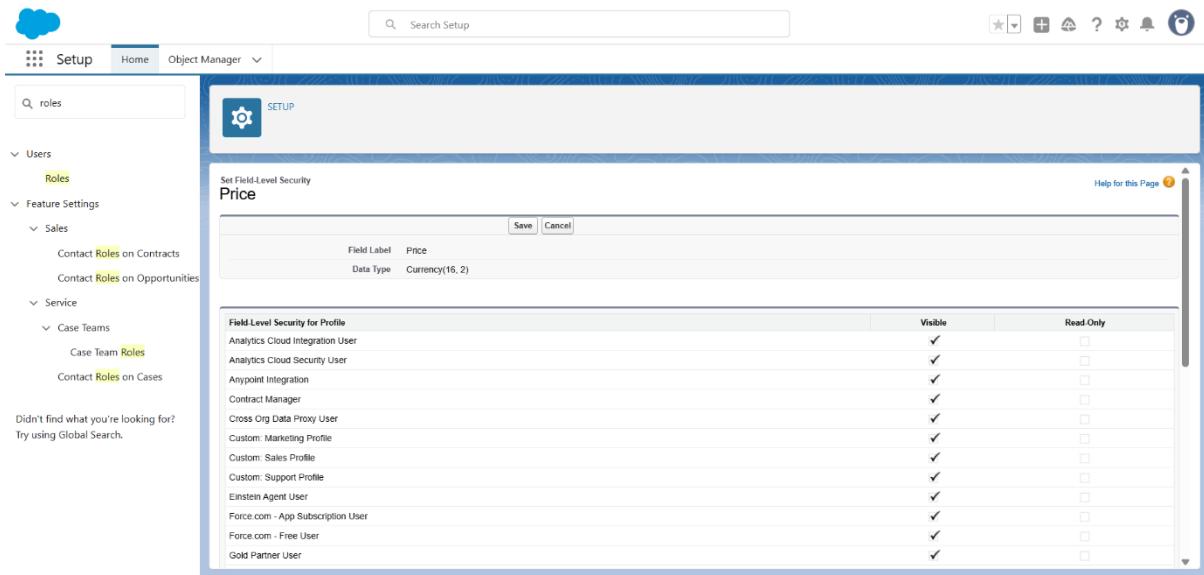
Other Settings

Field Level Security (FLS):

Purpose/Rationale: Restrict access to sensitive fields like pricing.

Implementation:

- Field: Price__c on Medicine__c
 - Pharmacist Profile → Read Only.
 - Supplier Coordinator → Hidden.
 - Manager → Read/Write.



The screenshot shows the Salesforce Setup interface. The left sidebar navigation includes 'Setup', 'Home', and 'Object Manager'. Under 'Users', 'Roles' is selected. In the main content area, a 'SETUP' tab is open with the sub-tab 'Field-Level Security'. A table titled 'Set Field-Level Security' is displayed, showing the field label 'Price' and data type 'Currency(16, 2)'. Below this, a table titled 'Field-Level Security for Profile' lists various user profiles with checkboxes for 'Visible' and 'Read-Only' permissions. The profiles listed include: Analytics Cloud Integration User, Analytics Cloud Security User, Anypoint Integration, Contract Manager, Cross Org Data Proxy User, Custom: Marketing Profile, Custom: Sales Profile, Custom: Support Profile, Einstein Agent User, Force.com - App Subscription User, Force.com - Free User, and Gold Partner User. Most profiles have both 'Visible' and 'Read-Only' checkboxes checked.

Field Label	Price	Save	Cancel
Data Type	Currency(16, 2)		

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	✓	□
Analytics Cloud Security User	✓	□
Anypoint Integration	✓	□
Contract Manager	✓	□
Cross Org Data Proxy User	✓	□
Custom: Marketing Profile	✓	□
Custom: Sales Profile	✓	□
Custom: Support Profile	✓	□
Einstein Agent User	✓	□
Force.com - App Subscription User	✓	□
Force.com - Free User	✓	□
Gold Partner User	✓	□

Session Settings:

Purpose/Rationale: Strengthen overall org security.

Implementation:

- Reduced Session Timeout → 2 hours.
- Enabled Lock sessions to IP Address to prevent hijacking.

Session Settings

Set the session security and session expiration timeout for your organization.

Session Timeout

Timeout Value: 30 minutes

Disable session timeout warning popup
 Force logout on session timeout

Session Settings

Lock sessions to the IP address from which they originated
 Lock sessions to the domain in which they were first used
 Terminate all of a user's sessions when an admin resets that user's password
 Force relogin after Login-As-User
 Require HttpOnly attribute
 Use POST requests for cross-domain sessions
 Enforce login IP ranges on every request
 When embedding a Lightning application in a third-party site, use a session token instead of a session cookie

Extended use of IE11 with Lightning Experience

EXTENDED USE OF IE11 WITH LIGHTNING EXPERIENCE HAS NOW ENDED
AS OF DECEMBER 31, THE EXTENDED PERIOD HAS ENDED AND USE OF INTERNET EXPLORER 11 (IE 11) WITH LIGHTNING EXPERIENCE IS NO LONGER SUPPORTED. ISSUES WITH PERFORMANCE OR FUNCTIONALITY THAT AFFECT ONLY IE 11 WILL NOT BE FIXED. PLEASE SWITCH TO A SUPPORTED BROWSER.

🌐 Login IP Ranges:

Purpose/Rationale: Restrict high-privilege users to pharmacy's secure network.

Implementation:

- For “System Administrator Profile” →
 - Start IP: 192.168.1.1
 - End IP: 192.168.1.255

Profiles

Minimum password length: 8
Password complexity requirement: Must include alpha and numeric characters
Password question requirement: Cannot contain password
Maximum invalid login attempts: 10
Lockout effective period: 15 minutes
Observe secret answer for password resets
Require a minimum 1 day password lifetime
Don't immediately expire links in forgot password emails

Login Hours

No login hours specified

Login IP Ranges

Action	IP Start Address	IP End Address	Description
Edit	192.168.1.1	192.168.1.255	

Enabled Apex Class Access

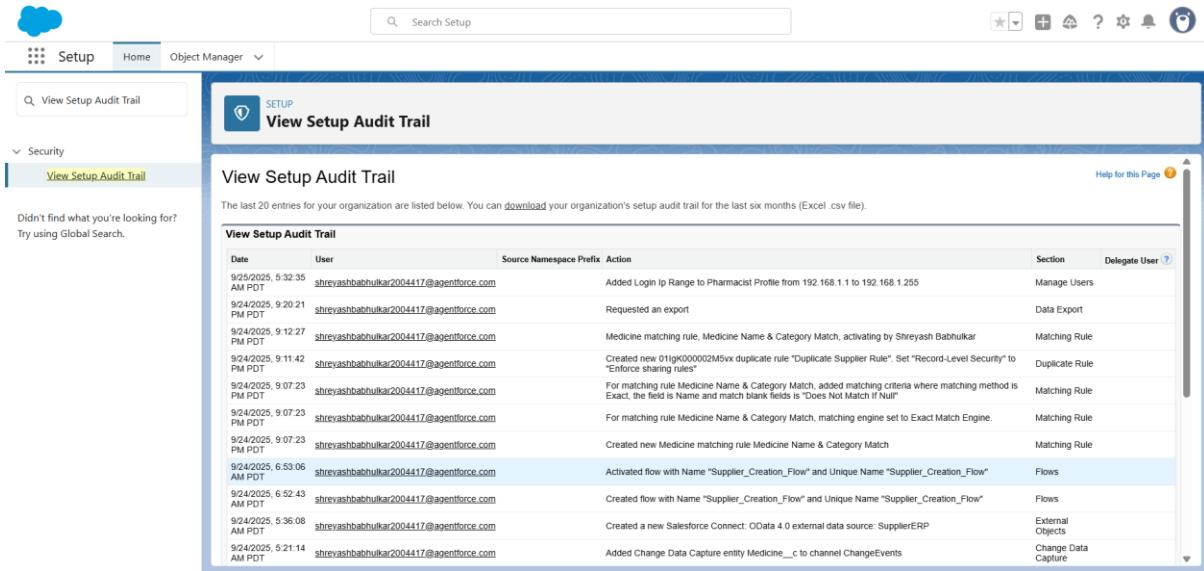
No Apex Classes enabled

Audit Trail:

Purpose/Rationale: Maintain accountability of admin changes.

Implementation:

- Used Setup Audit Trail to track changes like:
 - Session Settings modifications.
 - FLS applied on Price_c.
 - New sharing rule for Prescription Medicines.
- Exported the last 6 months log as backup.



The screenshot shows the Salesforce Setup Audit Trail interface. At the top, there's a search bar labeled "Search Setup" and various navigation icons. On the left, a sidebar includes links for "View Setup Audit Trail" under "Security" and "View Global Search". The main content area has a title "View Setup Audit Trail" with a subtitle "View Setup Audit Trail". It displays a table of 20 recent entries, each with a timestamp, user, source namespace prefix, action details, section, and delegate user information. The actions listed include adding login IP ranges, requesting exports, creating matching rules, activating flows, and creating external data sources.

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/25/2025, 5:32:35 AM PDT	shrevashbabulkar2004417@agentforce.com		Added Login Ip Range to Pharmacist Profile from 192.168.1.1 to 192.168.1.255	Manage Users	
9/24/2025, 9:20:21 PM PDT	shrevashbabulkar2004417@agentforce.com		Requested an export	Data Export	
9/24/2025, 9:12:27 PM PDT	shrevashbabulkar2004417@agentforce.com		Medicine matching rule, Medicine Name & Category Match, activating by Shreyash Babulkar	Matching Rule	
9/24/2025, 9:11:42 PM PDT	shrevashbabulkar2004417@agentforce.com		Created new 011gk000002M45vx duplicate rule "Duplicate Supplier Rule". Set "Record-Level Security" to "Enforce sharing rules"	Duplicate Rule	
9/24/2025, 9:07:23 PM PDT	shrevashbabulkar2004417@agentforce.com		For matching rule Medicine Name & Category Match, added matching criteria where matching method is Exact, the field is Name and match blank fields is "Does Not Match If Null"	Matching Rule	
9/24/2025, 9:07:23 PM PDT	shrevashbabulkar2004417@agentforce.com		For matching rule Medicine Name & Category Match, matching engine set to Exact Match Engine.	Matching Rule	
9/24/2025, 9:07:23 PM PDT	shrevashbabulkar2004417@agentforce.com		Created new Medicine matching rule Medicine Name & Category Match	Matching Rule	
9/24/2025, 6:53:06 AM PDT	shrevashbabulkar2004417@agentforce.com		Activated flow with Name "Supplier_Creation_Flow" and Unique Name "Supplier_Creation_Flow"	Flows	
9/24/2025, 6:52:43 AM PDT	shrevashbabulkar2004417@agentforce.com		Created flow with Name "Supplier_Creation_Flow" and Unique Name "Supplier_Creation_Flow"	Flows	
9/24/2025, 5:36:08 AM PDT	shrevashbabulkar2004417@agentforce.com		Created a new Salesforce Connect: OData 4.0 external data source: SupplierERP	External Objects	
9/24/2025, 5:21:14 AM PDT	shrevashbabulkar2004417@agentforce.com		Added Change Data Capture entity Medicine__c to channel ChangeEvents	Change Data Capture	