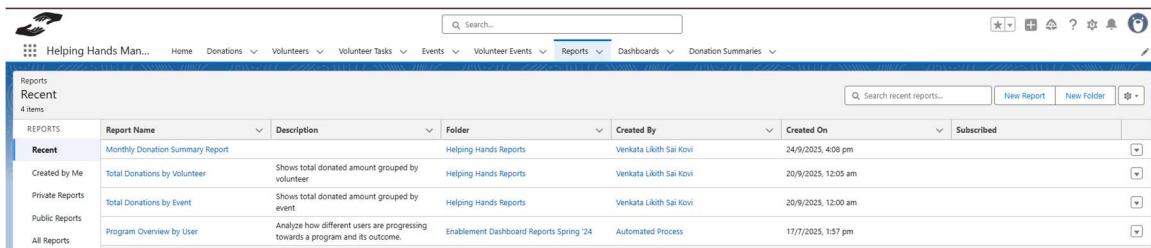


# Phase 9: Reporting, Dashboards & Security Review

This phase focuses on building meaningful reports and dashboards for the Helping Hands Foundation application and performing a final security review of the Salesforce org.

## Step 1: Create Reports

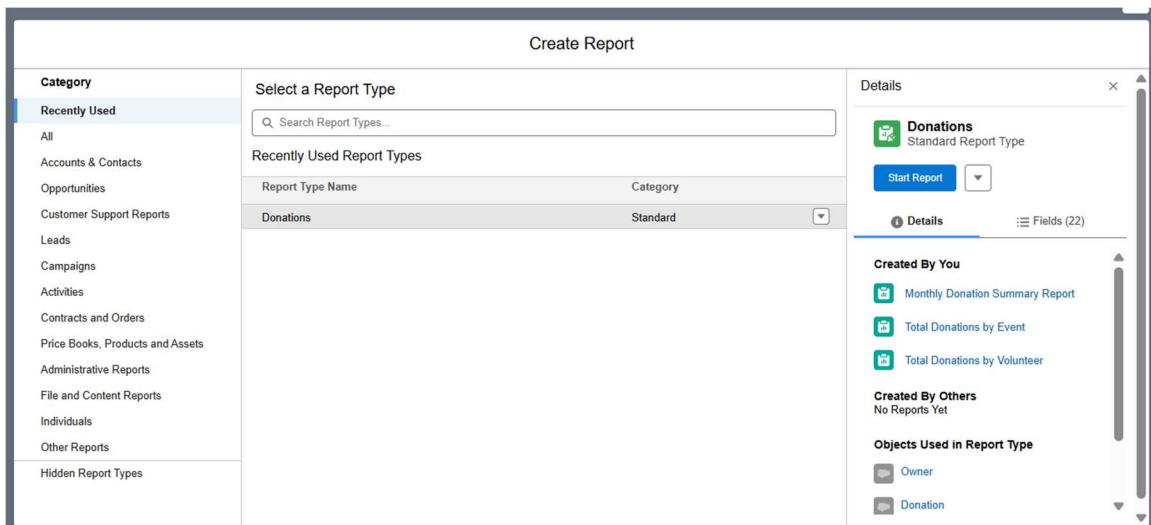
1. Navigate to Reports → App Launcher → Search 'Reports' → Open Reports tab.



The screenshot shows the Salesforce Reports interface. At the top, there's a navigation bar with the 'Helping Hands Man...' logo and a search bar. Below the navigation bar, there's a 'Reports' tab selected. The main content area shows a list of reports under the 'Recent' section. The table has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The reports listed are: Monthly Donation Summary Report, Total Donations by Volunteer, Total Donations by Event, and Program Overview by User.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Monthly Donation Summary Report		Helping Hands Reports	Venkata Likith Sai Kovi	24/9/2025, 4:08 pm	
Created by Me	Total Donations by Volunteer	Shows total donated amount grouped by volunteer	Helping Hands Reports	Venkata Likith Sai Kovi	20/9/2025, 12:05 am	
Private Reports	Total Donations by Event	Shows total donated amount grouped by event	Helping Hands Reports	Venkata Likith Sai Kovi	20/9/2025, 12:00 am	
Public Reports	Program Overview by User	Analyze how different users are progressing towards a program and its outcome.	Enablement Dashboard Reports Spring '24	Automated Process	17/7/2025, 1:57 pm	
All Reports						

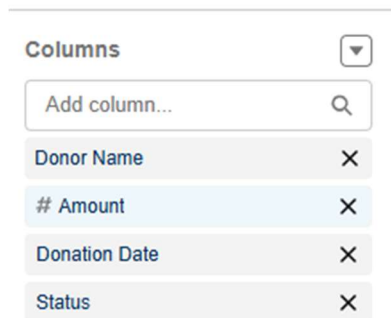
2. Create a New Report → Select object: Donations → Continue.



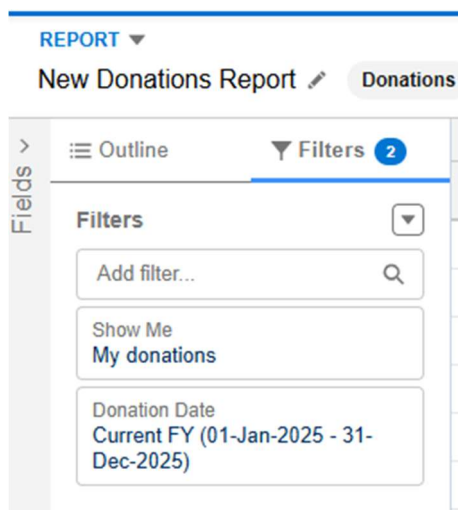
The screenshot shows the 'Create Report' wizard in Salesforce. The 'Category' sidebar on the left lists various report categories, with 'Recently Used' selected. The main area is titled 'Select a Report Type' and shows a search bar and a table of 'Recently Used Report Types'. The table has columns for Report Type Name and Category. The 'Donations' report type is selected. On the right, the 'Details' panel shows the 'Donations' report type, a 'Start Report' button, and a list of reports created by the user, including 'Monthly Donation Summary Report', 'Total Donations by Event', and 'Total Donations by Volunteer'.

Report Type Name	Category
Donations	Standard

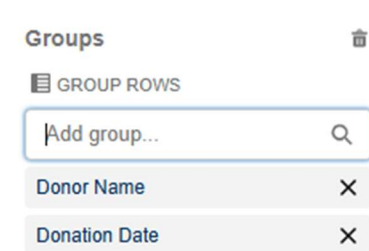
3. Add Columns → Donor Name, Donation Amount, Donation Date, Payment Status.



4. Apply Filters → Donation Date = Current Fiscal Year.



5. Group Records → Group by Donor Name, Group by Month (Donation Date).



6. Save & Run Report → Name: Donation Summary Test Report → Save to Helping Hands Reports Folder.



Report: Donations

**Donation Summary Test Report**Total Records  
20Total Amount  
₹5,83,101

<input type="checkbox"/> Donor Name ↑ ▾	<input type="checkbox"/> Donation Date ↑ ▾	<input type="checkbox"/> Amount ▾	<input type="checkbox"/> Status ▾
<input type="checkbox"/> 10000 (1)	25/09/2025 (1)	₹20,000	Pledged
	Subtotal	₹20,000	
Subtotal		₹20,000	
<input type="checkbox"/> Aravind (1)	23/09/2025 (1)	₹3,000	Pledged
	Subtotal	₹3,000	
Subtotal		₹3,000	
<input type="checkbox"/> Chandana (1)	23/09/2025 (1)	₹2,00,000	Received
	Subtotal	₹2,00,000	
Subtotal		₹2,00,000	
<input type="checkbox"/> Karina (1)	11/09/2025 (1)	₹10,000	Received
	Subtotal	₹10,000	
Subtotal		₹10,000	
<input type="checkbox"/> Likith sai (1)	19/09/2025 (1)	₹3,000	Received
	Subtotal	₹3,000	
Subtotal		₹3,000	
<input type="checkbox"/> Ram (1)	25/09/2025 (1)	₹2,00,000	Received
	Subtotal	₹2,00,000	
Subtotal		₹2,00,000	
Row Counts <input checked="" type="checkbox"/>	Detail Rows <input checked="" type="checkbox"/>	Subtotals <input checked="" type="checkbox"/>	Grand Total <input checked="" type="checkbox"/>

[⚡ Recent Items](#)[⚡ Chatter Feed](#)

## Step 2: Create Dashboard

1. Navigate to Dashboards tab → New Dashboard → Name: Helping Hands Test Dashboard.

Volunteer Tasks ▾ Events ▾ Volunteer Events ▾ Reports ▾ Dashboards ▾ Donation Summaries ▾

×

### New Dashboard

\*Name

Description

Folder  
 [Select Folder](#)

[Cancel](#) [Create](#)

## 2. Add Components → Link reports to visualizations:

- Donations by Month (Bar Chart)
- Top Donors (Donut Chart)
- Total Donations (Number widget)

## 3. Configure Dashboard → Running User = Financial Officer → Save & Refresh.

### Add Widget

Report

☐ Use chart settings from report

Display As

123

X-Axis

Y-Axis

Preview

Donation Summary Test Report

Donation Date

- 25/09/2025
- 23/09/2025
- 11/09/2025
- 19/09/2025
- 18/09/2025
- 24/09/2025
- 22/09/2025
- 26/09/2025
- 14/09/2025

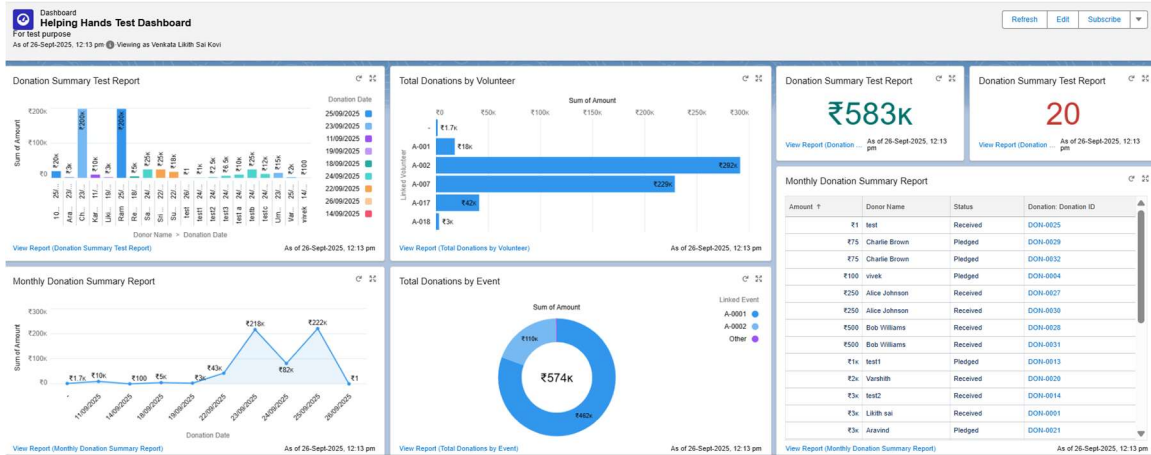
Sum of Amount

Donor Name > Donation Date

View Report (Donation Summary Test Report)

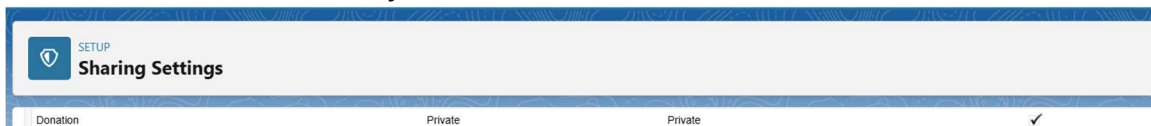
[Cancel](#) [Add](#)

#### 4. Create Dynamic Dashboard → Run as logged-in user.



### Step 3: Security Review

1. **Sharing Settings** : Setup → Sharing Settings → Ensure Donations = Private, Volunteer = Public Read Only.



2. **Field-Level Security** : Setup → Object Manager → Fields → Set Field-Level Security for sensitive fields.

Set Field-Level Security

Amount

Save Cancel

Field Label	Amount	Data Type	Field Level Security for Profile	Visible	Read-Only
Amount	Amount	Currency(18, 0)	Analytics Cloud Integration User	✓	<input type="checkbox"/>
			Analytics Cloud Security User	✓	<input type="checkbox"/>
			Anypoint Integration	✓	<input type="checkbox"/>
			Contract Manager	✓	<input type="checkbox"/>
			Cross Org Data Proxy User	✓	<input type="checkbox"/>
			Custom: Marketing Profile	✓	<input type="checkbox"/>
			Custom: Sales Profile	✓	<input type="checkbox"/>
			Custom: Support Profile	✓	<input type="checkbox"/>
			Donation Manager Profile	✓	<input type="checkbox"/>
			Einstein Agent User	✓	<input type="checkbox"/>
			Force.com - App Subscription User	✓	<input type="checkbox"/>

### 3. Session Settings : Setup → Session Settings → Timeout 2 hrs, Require HTTPS.

SETUP

Session Settings

Session Settings

Help for this Page

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

Session Timeout

Timeout Value2 hours

☐ Disable session timeout warning popup

☒ Force logout on session timeout

### 4. Login IP Ranges : Setup → Profiles → System Administrator → Add allowed IPs.

SETUP

Profiles

Login Hours

Edit

No login hours specified

Login IP Ranges

New

Action	IP Start Address	IP End Address
<a href="#">Edit</a>   <a href="#">Del</a>	103.255.146.242	103.255.146.242

### 5. Audit Trail : Setup → View Setup Audit Trail → Review all admin actions.

SETUP

View Setup Audit Trail

View Setup Audit Trail

Help for this Page

The last 20 entries for your organization are listed below. You can [download](#) your organization's setup audit trail for the last six months (Excel .csv file).

Date	User	Source Namespace Prefix	Action	Section	Delegate User ?
26/09/2025, 12:30:59 pm IST	<a href="#">sailikith511187@agentforce.com</a>		Added Login Ip Range to System Administrator from 103.255.146.242 to 103.255.146.242	Manage Users	
26/09/2025, 10:49:13 am IST	<a href="#">sailikith511187@agentforce.com</a>		Requested an export	Data Export	
26/09/2025, 10:44:25 am IST	<a href="#">sailikith511187@agentforce.com</a>		For the 01lgK000002KSr duplicate rule Prevent_Duplicate_Donations, changed "Active" from "false" to "true"	Duplicate Rule	
26/09/2025, 10:44:22 am IST	<a href="#">sailikith511187@agentforce.com</a>		For duplicate rule Prevent_Duplicate_Donations, changed matching rules.	Duplicate Rule	
26/09/2025, 10:44:22 am IST	<a href="#">sailikith511187@agentforce.com</a>		Created new 01lgK000002KSr duplicate rule "Prevent_Duplicate_Donations". Set "Record-Level Security" to "Enforce sharing rules"	Duplicate Rule	
26/09/2025, 10:40:58 am IST	<a href="#">sailikith511187@agentforce.com</a>		Donation matching rule, Donation_Matching_Rule, activating by Venkata Likith Sai Kovi	Matching Rule	
26/09/2025, 10:40:46 am IST	<a href="#">sailikith511187@agentforce.com</a>		For matching rule Donation_Matching_Rule, added matching criteria where matching method is Exact, the field is Donor_Email and match blank fields is "Does Not Match if Null"	Matching Rule	
26/09/2025, 10:40:46 am IST	<a href="#">sailikith511187@agentforce.com</a>		For matching rule Donation_Matching_Rule, added matching criteria where matching method is Exact, the field is Donor_Name and match blank fields is "Does Not Match if Null"	Matching Rule	
26/09/2025, 10:40:46 am IST	<a href="#">sailikith511187@agentforce.com</a>		For matching rule Donation_Matching_Rule, matching engine set to Exact Match Engine.	Matching Rule	
26/09/2025, 10:40:46 am IST	<a href="#">sailikith511187@agentforce.com</a>		Created new Donation matching rule Donation_Matching_Rule	Matching Rule	

## Step 4: Testing Reports & Security

1. Login as Volunteer Coordinator → Open Dashboard → Check restricted data hidden.

Logged in as Volunteer Coordinator (vc.volunteer@ngo.org) Log out as Volunteer Coordinator

Search...

Sales + Enablement Dashboard

Dashboard  
**Enablement Dashboard**  
View data on how Enablement helps drive your business outcomes. This is your main dashboard for all Enablement analytics. Don't delete it. If you want to make changes to this dashboard, duplicate it.  
Viewing as Volunteer Coordinator

Refresh

The source report is based on a report type that is inaccessible to the dashboard's running user.

View Report

The source report is based on a report type that is inaccessible to the dashboard's running user.

View Report

The source report is based on a report type that is inaccessible to the dashboard's running user.

View Report

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View Report

The source report is based on a report type that is inaccessible to the dashboard's running user.

View Report

The source report is based on a report type that is inaccessible to the dashboard's running user.

View Report

2. Login as Financial Officer → Verify donation details are visible.

Logged in as Finance Officer (fo.officer@ngo.org) Log out as Finance Officer

Search...

Helping Hands Man... Donations Volunteers Events Reports Dashboards Volunteer Tasks Volunteer Events Donation Summaries

Monthly Donation Summary Report

Sum of Amount

Donation Date

11/09/2025  
18/09/2025  
19/09/2025  
22/09/2025  
Other

₹584k

View Report (Monthly Donation Summary Rep... As of 26-Sept-2025, 10:08 am

Monthly Donation Summary Report

Sum of Amount

Donation Date

11/09/2025  
14/09/2025  
18/09/2025  
19/09/2025  
22/09/2025  
26/09/2025  
26/09/2025  
26/09/2025

₹1.3k  
₹10k  
₹100  
₹6k  
₹3k  
₹43k  
₹218k  
₹22k  
₹222k

View Report (Monthly Donation Summary Rep... As of 26-Sept-2025, 10:08 am

Monthly Donation Summary ..

24

View Report (Mo... As of 26-Sept-2025, 10:08 am

₹584k

View Report (Mo... As of 26-Sept-2025, 10:08 am

Monthly Donation Summary Report

Amount	Donor Name	Status	Donation: Donation ID
₹1	test	Received	DON-0025
₹75	Charlie Brown	Pledged	DON-0029
₹100	vivek	Pledged	DON-0004
₹250	Alice Johnson	Received	DON-0027
₹500	Bob Williams	Received	DON-0026
₹500	Bob Williams	Received	DON-0028
₹1k	test1	Pledged	DON-0013
₹2k	Varshith	Received	DON-0020
₹3k	test2	Received	DON-0014
₹3k	Lkith sai	Received	DON-0001

View Report (Monthly Donation Summary Rep... As of 26-Sept-2025, 10:08 am

Recent Items Chatter Feed