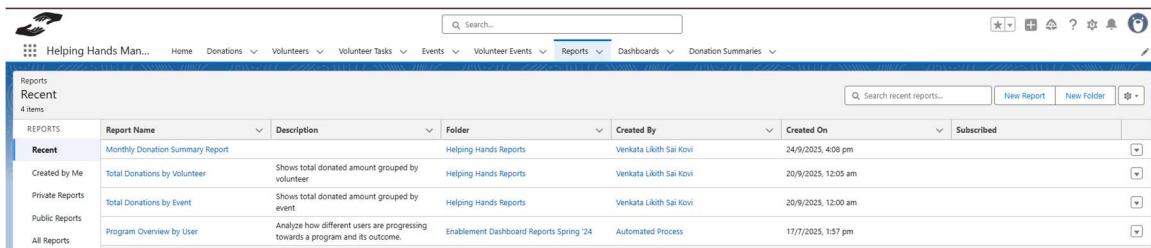# Phase 9: Reporting, Dashboards & Security Review

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.
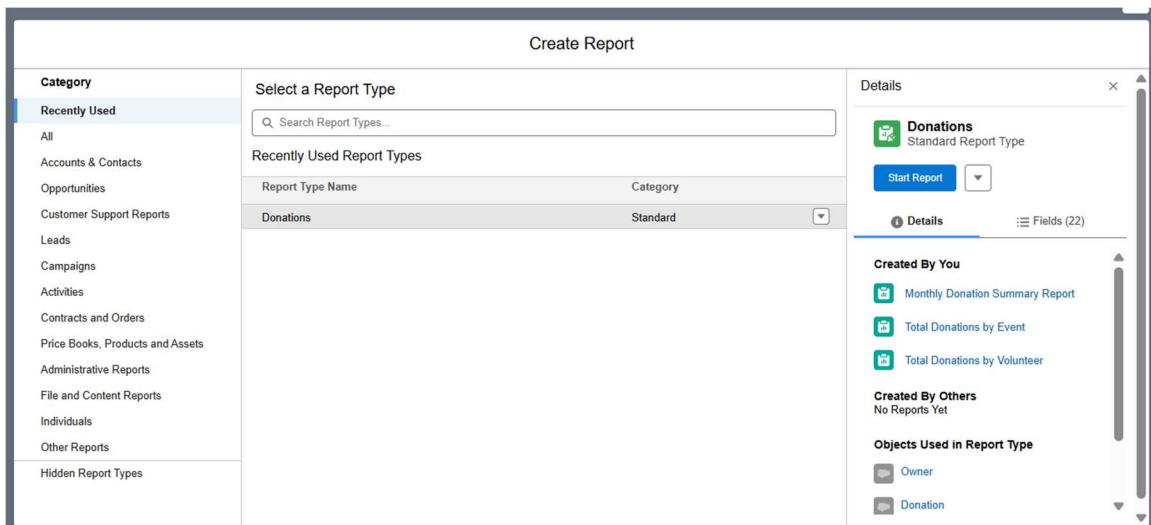
Step 1: Create Reports

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

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

3. Add Columns → Donor Name, Donation Amount, Donation Date, Payment Status.
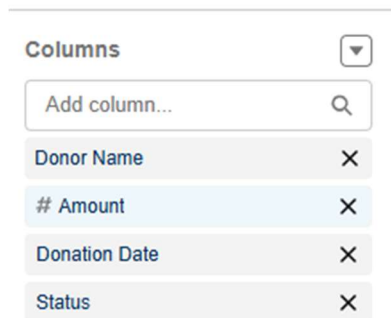
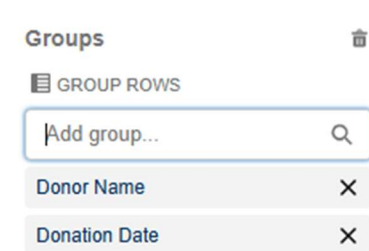4. Apply Filters → Donation Date = Current Fiscal Year.
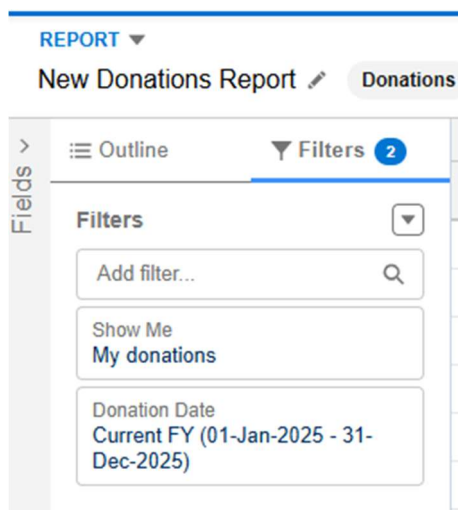
5. Group Records → Group by Donor Name, Group by Month (Donation Date).

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

Helping Hands Man...   Home   Donations ⌄   Volunteers ⌄

Report: Donations
Donation Summary Test Report

Total Records	Total Amount
20	₹5,83,101

☐ Donor Name ↑ ▾	Donation Date ↑ ▾	Amount ▾	Status ▾
☐ 10000 (1)	25/09/2025 (1)	₹20,000	Pledged
	Subtotal	₹20,000	
Subtotal		₹20,000	
☐ Aravind (1)	23/09/2025 (1)	₹3,000	Pledged
	Subtotal	₹3,000	
Subtotal		₹3,000	
☐ Chandana (1)	23/09/2025 (1)	₹2,00,000	Received
	Subtotal	₹2,00,000	
Subtotal		₹2,00,000	
☐ Karina (1)	11/09/2025 (1)	₹10,000	Received
	Subtotal	₹10,000	
Subtotal		₹10,000	
☐ Likith sai (1)	19/09/2025 (1)	₹3,000	Received
	Subtotal	₹3,000	
Subtotal		₹3,000	
☐ Ram (1)	25/09/2025 (1)	₹2,00,000	Received
	Subtotal	₹2,00,000	
Subtotal		₹2,00,000	

Row Counts ✅   Detail Rows ✅   Subtotals ✅   Grand Total ✅

⚡ Recent Items   ⚡ Chatter Feed

Step 2: Create Dashboard

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

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.
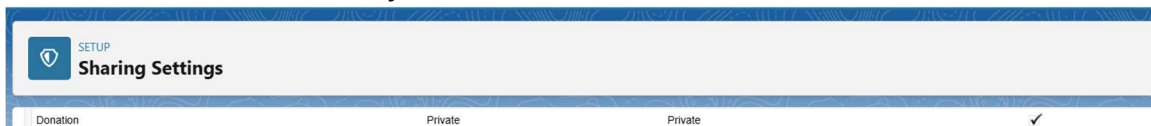
4. Create Dynamic Dashboard → Run as logged-in user.
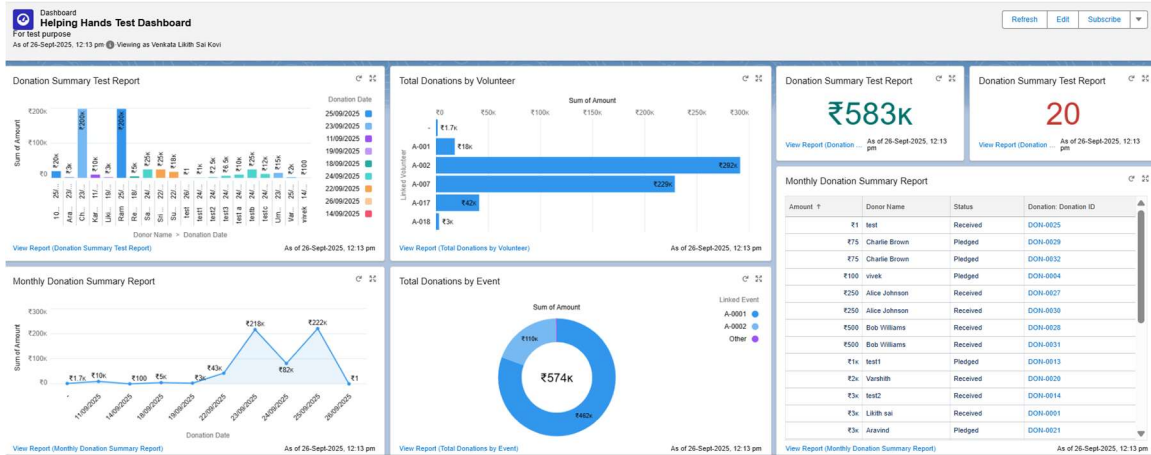
Step 3: Security Review

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.

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

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

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

Step 4: Testing Reports & Security

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

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