

Phase 9 — Reporting, Dashboards & Security

Review (Implemented Reports)

Objective: Create meaningful reports to track donations, volunteers, and NGO Programs in the salesforce NGO Management system.

A. Reports Implemented

1. New Donations Report

Purpose: Track all active donations in the system.

Steps (Click by Click):

1. Go to **App Launcher** → **Reports** → **New Report**.
2. Select **Report Type:** Donations.
3. Click **Continue**.
4. Apply Filters:
 - **Active = Confirmed** (only show successful donations).
5. Select Columns to Display:
 - Donor Name
 - Donation amount
 - Donation Date
 - Campaign
 - Payment Method
6. Sort by **Donation Date** (most recent first).
7. Click **Save & Run** → Name: New Travel Packages Report → Folder: Public Reports.
8. Click **Done**.

Provides visibility into funding inflow for NGO activities.

2. Volunteer Registration Report

Purpose: Track newly registered volunteers for onboarding and assignment.

Steps (Click by Click):

1. Go to **App Launcher** → **Reports** → **New Report**.

2. Select **Report Type**: Volunteer.
3. Click **Continue**.
4. Apply Filters:
 - o **Created Date = This Month**
5. Select Columns to Display:
 - o Name
 - o Email
 - o Phone
6. Sort by **Created Date** to prioritize recent leads.
7. Click **Save & Run** → Name: New Volunteer registration → Folder: Public Reports.
8. Click **Done**.

Helps the sales team track new leads and plan follow-ups efficiently.

The screenshot shows the Salesforce Reports page. On the left, there's a sidebar with categories: Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), Folders (All Folders, Created by Me, Shared with Me), and Favorites (All Favorites). The main area displays a table of recent reports:

Report Name	Description	Folder	Created By	Created On	Subscribed
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	7/17/2025, 11:39 AM	
New Campaigns Report		Private Reports	Madhura Ughade	9/26/2025, 5:44 AM	
New Donations with Donor ID Report		Private Reports	Madhura Ughade	9/26/2025, 5:41 AM	

B. Dashboards Creation

Purpose: Visualize reports for quick NGO insights.

Steps (Click by Click):

1. Go to App Launcher → Dashboards → New Dashboard.
2. Enter **Name**: NGO impact Overview → Select Folder → Click **Create**.

3. Click +Component → Select a report → Choose **Chart Type** (Bar, Pie, Heatmap).
4. Sample Components Added:
 - o Donation summary→ Total donation by program.
5. Arrange components → Click **Save** → Click **Done**.

Dashboards now provide a visual overview for quick decision-making.

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
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.	Private Dashboards	Enablement Dashboard Spring '24 Automated Process	7/17/2025, 11:39 AM	
NGO Overview Dashboard		Private Dashboards	Madhura Ughade	9/26/2025, 5:45 AM	

C. Security Review

Objective: Ensure data privacy, proper access control, and audit tracking.

Steps (Click by Click):

1. **Organization-Wide Defaults (OWD):**
 - o Go to **Setup** → **Security** → **Sharing Settings**.
 - o Donation: Private o Volunteer: Controlled by Role
2. **Profiles & Permission Sets:**
 - o Assign to donation campaign.
3. **Record-Level Restrictions:**
 - o Ensure users can only access their own records where required .

The screenshot shows the Salesforce Sharing Settings page. The left sidebar has a search bar and sections for Security, Guest User Sharing Rule Access Report, and Sharing Settings. The main content area is titled "Sharing Settings" and displays the "Default Sharing Settings" table. The table has columns for Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. It lists various objects like Lead, Account and Contract, Contact, Order, Asset, Opportunity, Case, Campaign, Campaign Member, and User, each with specific sharing rules.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Private	Private	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Private	Private	✓
Campaign	Public Read Only	Public Read Only	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓

Data is now secure, and access is restricted as per roles and profiles.