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

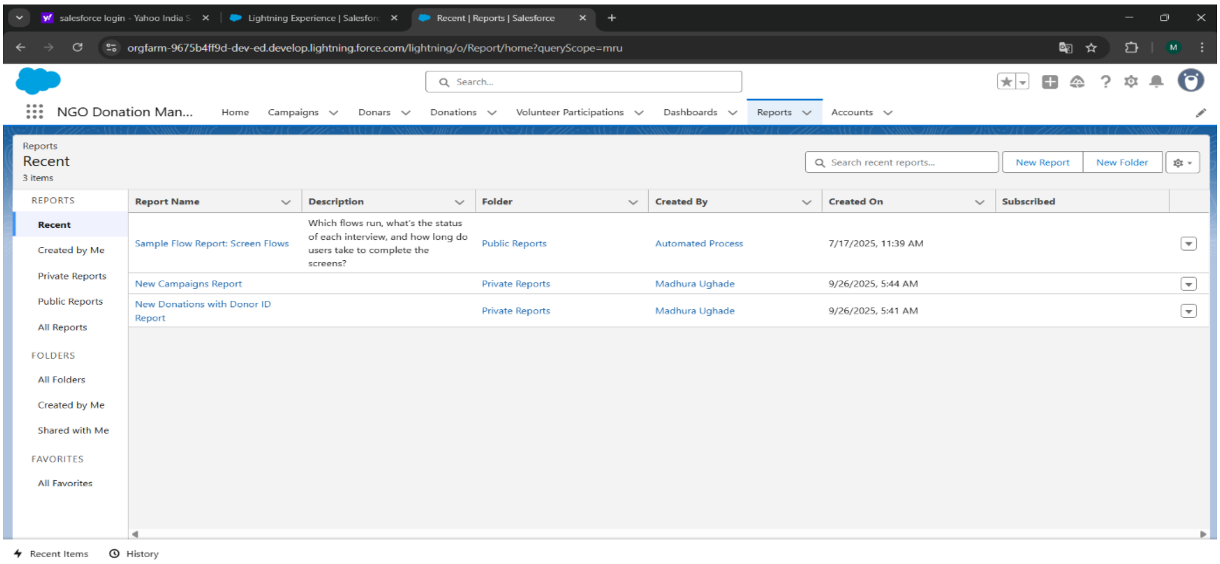
Purpose: Track newly registered volunteers for onboarding and assignment.

Steps (Click by Click):

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

2. Select **Report Type:** Volunteer.
3. Click **Continue**.
4. Apply Filters:
    - **Created Date = This Month**
5. Select Columns to Display:
    - Name ○ Email ○ 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.



B. Dashboards Creation

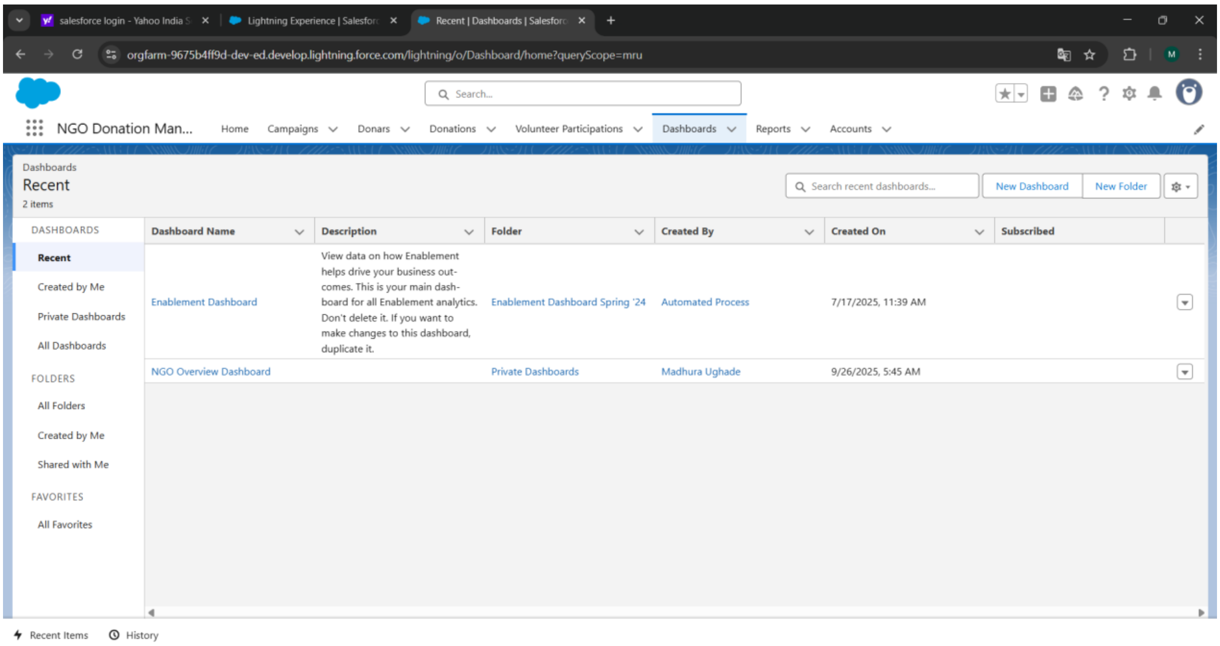
Purpose: Visualize reports for quick NGO insights.

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:
   - Donation summary→ Total donation by program.
5. Arrange components → Click **Save** → Click **Done**.

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

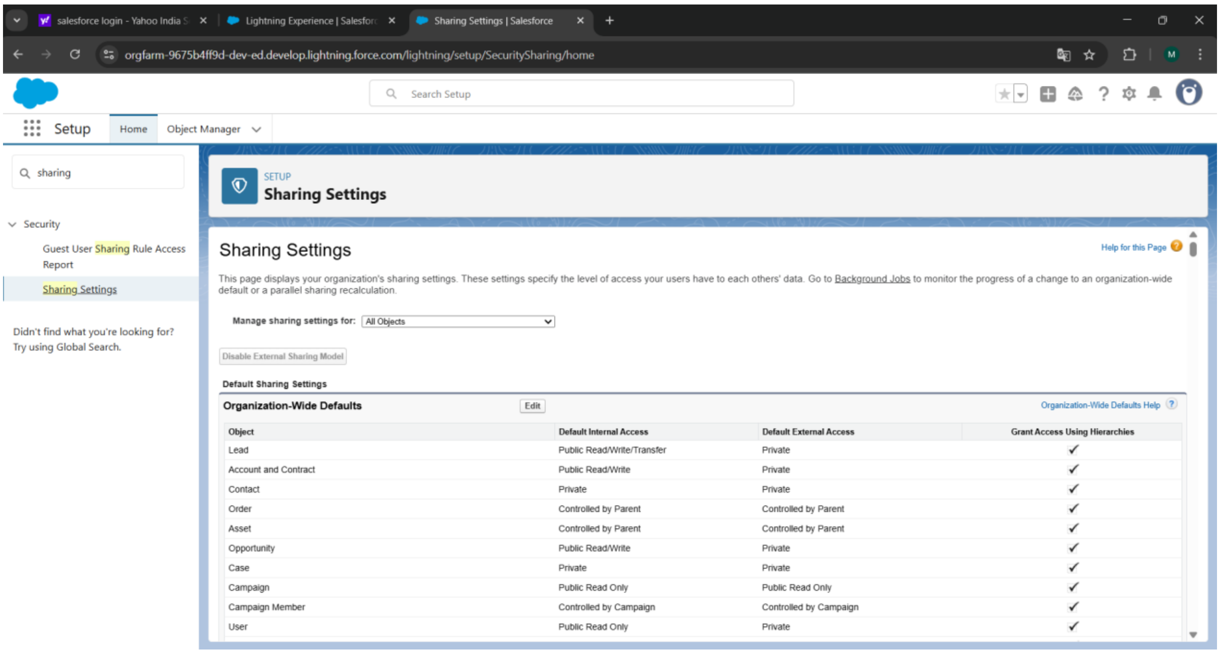


C. Security Review

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

Steps (Click by Click):

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



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