

PHASE 9 – REPORTING, DASHBOARDS & SECURITY

Objective:

To design an analytics layer that provides real-time business insights and to verify that all reporting components comply with the CRM's security model. This ensures that visual data is accurate, accessible only to authorized users, and aligned with operational needs of the Pharmacy Delivery CRM.

9.1 Introduction to Reporting & Security Review

Reporting and security review represent the final refinement stage of any CRM implementation.

In the Pharmacy Delivery CRM, Phase 9 focuses on two critical objectives:

1. **Business Monitoring** – ensuring managers and staff can track deliveries, revenue, agent performance, delays, and operational KPIs using reports and dashboards.
2. **Data Protection** – ensuring sensitive patient information is accessible only to authorized users, especially when reports or dashboard components are shared.

This phase ensures the CRM is **insightful, secure, compliant, and ready for daily use**.

PART A: REPORTING & DASHBOARDS (ANALYTICS LAYER)

9.2 Reporting Framework Design

Reports were designed around the core business questions:

- How many deliveries are created daily?
- What is the total revenue from deliveries?
- How many deliveries are delayed or failed?
- Which delivery agent is performing well?
- Which pharmacy generates most orders?

Reports fall under three categories:

1. Operational Reports

Daily monitoring for staff:

- Pending Deliveries
- Today's Deliveries
- Late Deliveries
- Out-for-Delivery Records

2. Performance Reports

Used by managers:

- Revenue Reports
- Cancellation Analysis
- Agent Performance Summary
- Delivery Duration Analysis

3. Compliance & Audit Reports

Used during review or audits:

- Delivery Modification History
 - Failed Delivery Analysis
 - Status Transition Log
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9.3 Core Reports Created

Below are the detailed reports implemented.

9.3.1 Report 1 – All Deliveries Report

Objective:

Provides a complete list of all deliveries with details required for operational review.

Report Type:

Custom Report Type – Deliveries with Patient & Delivery Agent

Fields Included:

- Delivery Name
- Delivery Date
- Patient
- Pharmacy
- Delivery Agent
- Status
- Amount
- Payment Method

Filters:

- All records
- All time

Grouping:

- Optional grouping by Delivery Date
- Optional grouping by Pharmacy

Business Value:

- Gives staff a complete 360-degree view of delivery operations
 - Used during daily standup meetings
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9.3.2 Report 2 – Deliveries by Status**Objective:**

To visualize delivery workload distribution.

Fields Used:

- Status
- Count of Deliveries

Grouping:

- Grouped by Status

Summary Values:

- Total Deliveries
- Delivered Count
- Late Count
- Failed Count

Visual Chart:**Donut Chart****Business Value:**

- Enables quick identification of operational bottlenecks
 - Managers can take immediate corrective actions
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9.3.3 Report 3 – Revenue by Pharmacy**Objective:**

Track income generated per pharmacy.

Grouping:

- Group by Pharmacy

Summary Formula:

SUM(Amount)

Business Insights:

- Identify high-value pharmacy partners
 - Helps prioritize service availability
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9.3.4 Report 4 – Delivery Agent Performance Report

Fields Included:

- Delivery Agent
- Count of deliveries
- Count of On-Time Deliveries
- Count of Late Deliveries
- Count of Failed Deliveries

Insights Provided:

- Efficiency scoring
 - Identification of training needs
 - Direct agent performance comparison
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9.4 Report Types Used

Custom Report Type Created:

Delivery → Patient → Delivery Agent

Purpose:

- Allows linking delivery data with patient and agent details
 - Enables advanced reporting involving three related objects
 - Supports combined reports (e.g., Revenue by Agent for Selected Patients)
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9.5 Dashboard Framework Design

Dashboards provide visual insights for quick decision-making.

Two dashboards were created:

1. Delivery Operations Dashboard

For operational staff

2. Manager's Executive Dashboard

For senior management

9.5.1 Dashboard 1 – Delivery Operations Dashboard

Components:

A) Donut Chart – Deliveries by Status

- Highlights pending, delayed, delivered counts
- Helps prioritize workload instantly

B) Table – All Deliveries

- Shows delivery details (Name, Date, Status, Agent, Amount)

C) Bar Graph – Daily Delivery Count

- Shows fluctuations in delivery volume

D) KPI – Total Revenue

- Shows combined value of all successful deliveries

Purpose:

- Operational monitoring tool
 - Used by staff throughout the day
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9.5.2 Dashboard 2 – Manager's Executive Dashboard

Components:

A) Line Chart – Revenue Trend

- Monthly / weekly revenue movement
- Helps track business growth

B) Horizontal Bar – Agent Performance Scores

- Ranking based on number of deliveries completed
- Includes on-time vs late ratio

C) Pie Chart – Failed Deliveries Breakdown

- Reasons for failures (address errors, cancellations, etc.)

D) Gauge Chart – On-Time Delivery Rate

- Helps determine service reliability and customer satisfaction
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9.6 Dynamic Dashboards

Dynamic dashboards were implemented to ensure user-specific visibility.

Modes Used:

Run Dashboard As: Current User

Each user sees only their allowed data based on:

- Role hierarchy
- Sharing rules
- OWD settings

Use Cases:

Pharmacy Staff

- Can see all deliveries, reports for their department

Delivery Agents

- Can see **ONLY their assigned deliveries**
- Cannot view other agents' data
- Ensures data confidentiality

Managers

- See everything (top of hierarchy)
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PART B: SECURITY REVIEW & ACCESS CONTROL

9.7 Delivery Object Security Audit

Security was reviewed to ensure no data leakage.

9.7.1 OWD Settings

Object	Default Access
Delivery	Private

Object	Default Access
Contact	Controlled by Parent
Account (Pharmacy)	Public Read/Write
Delivery Agent	Public Read Only

Why Delivery = Private?

- Ensures agents cannot view each other's deliveries
 - Prevents patient information leakage
 - Complies with data privacy standards
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9.8 Sharing Rules Review

Sharing rules implemented:

Rule 1 – Staff Access Rule

Staff role gains Read/Write access to all deliveries.

Rule 2 – Manager Superior Rule

Managers automatically inherit visibility of all staff and agent data via role hierarchy.

Rule 3 – Delivery Agent Restricted Access

Agents only see:

- Deliveries assigned to them
 - In Read-Only mode for sensitive fields
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9.9 Field-Level Security (FLS) Review

Fields hidden from Delivery Agents:

- Payment Method
- Amount
- Pharmacy internal notes
- Patient medical notes
- Email & sensitive contact details

Reason:

- Protect patient privacy
- Restrict financial data

- Ensure minimal required visibility
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9.10 Page Layout & Compact Layout Security

Separate page layouts applied for:

- Staff
- Manager
- Delivery Agent

Delivery Agent layout includes only minimum essential information required for job execution.

9.11 Session Security Review

Settings applied:

- **Session Timeout:** 30 minutes
- **Session Timeout Warning:** Enabled
- **Session Locking to IP Address:** Enabled
- **Session Locking to Browser:** Enabled
- **Login Token Refresh:** Enabled

Benefits:

- Prevents unauthorized access
 - Protects patient delivery data
 - Secures mobile access
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9.12 Login IP Restrictions

Delivery Agents:

Restricted to company devices/IP ranges
Prevents login from unknown locations

Managers & Staff:

Allowed broader access for flexibility
MFA advised for these roles

9.13 Audit Trail Configuration

Salesforce Setup Audit Trail captures:

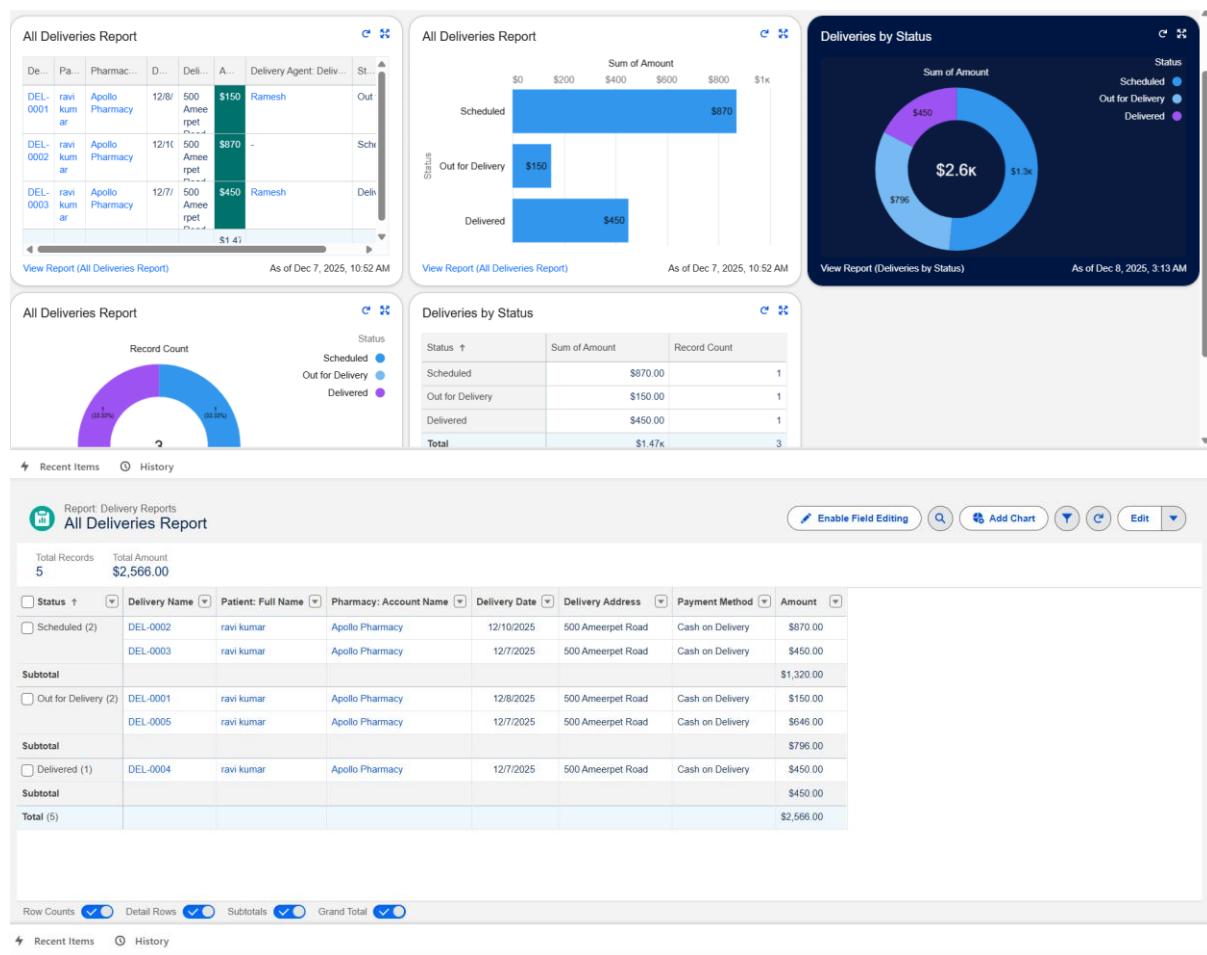
- All configuration changes
- User profile modifications
- Security policy updates

Delivery Object Field History Tracking Enabled For:

- Delivery Date
- Delivery Agent
- Status
- Payment Method
- Amount

Purpose:

To monitor manipulation attempts or errors.



Pharmacy Delivery CRM

Report: Delivery Reports
Deliveries by Status

Status	Delivery Name	Patient: Full Name	Pharmacy: Account Name	Delivery Date	Delivery Address	Payment Method	Amount
Scheduled (2)	DEL-0002	ravi kumar	Apollo Pharmacy	12/10/2025	500 Ameerpeth Road	Cash on Delivery	\$870.00
	DEL-0003	ravi kumar	Apollo Pharmacy	12/7/2025	500 Ameerpeth Road	Cash on Delivery	\$450.00
Subtotal							\$1,320.00
Out for Delivery (2)	DEL-0001	ravi kumar	Apollo Pharmacy	12/8/2025	500 Ameerpeth Road	Cash on Delivery	\$150.00
	DEL-0005	ravi kumar	Apollo Pharmacy	12/7/2025	500 Ameerpeth Road	Cash on Delivery	\$648.00
Subtotal							\$798.00
Delivered (1)	DEL-0004	ravi kumar	Apollo Pharmacy	12/7/2025	500 Ameerpeth Road	Cash on Delivery	\$450.00
Subtotal							\$450.00
Total (5)							\$2,568.00

Row Counts Detail Rows Subtotals Grand Total

Pharmacy Delivery CRM

Report: Delivery Reports
Deliveries by Status

Total Records 5 Total Amount \$2,568.00

Status

- Delivered (●)
- Out for Delivery (●)
- Scheduled (●)

Record Count 5

Row Counts Detail Rows Subtotals Grand Total

Pharmacy Delivery CRM

Reports Recent

2 items

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Deliveries by Status		Public Reports	S.V.S.N. TEJA SWARUP	12/7/2025, 6:41 AM	<input checked="" type="checkbox"/>
	All Deliveries Report		Public Reports	S.V.S.N. TEJA SWARUP	12/7/2025, 6:37 AM	<input checked="" type="checkbox"/>

REPORTS

- Created by Me
- Private Reports
- Public Reports
- All Reports

FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

Recent Items History

Pharmacy Delivery CRM

Deliveries

Recently Viewed ▾

5 items • Updated a few seconds ago

	Delivery Name	Action
1	DEL-0005	View
2	DEL-0004	View
3	DEL-0003	View
4	DEL-0001	View
5	DEL-0002	View

Recent Items History

Pharmacy Delivery CRM

Contacts

My Contacts

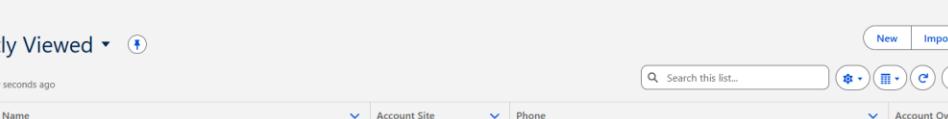
Total Contacts 2

No Activity 0 Idle 0 No Upcoming 0 Overdue 0 Due Today 0 Upcoming 0

2 items • Filtered by Created Date, Me, Total Contacts

Name	Title	Account Name	Last Activity	Actions
ravi kumar		Apollo Pharmacy		
sunil k		medplus		

Recent Items History



Pharmacy Delivery CRM

Accounts Contacts Deliveries Reports Dashboards Delivery Agents

Recently Viewed

2 items • Updated a few seconds ago

	Account Name	Account Site	Phone	Account Owner Alias	
1	<input type="checkbox"/> medplus		(312) 596-1000	sri	
2	<input type="checkbox"/> Apollo Pharmacy		(987) 654-3210	sri	

The screenshot shows the 'Delivery Agents' section of the Pharmacy Delivery CRM. At the top, there's a navigation bar with links for 'Recent Items', 'History', 'Accounts', 'Contacts', 'Deliveries', 'Reports', 'Dashboards', and 'Delivery Agents'. Below the navigation is a search bar and a toolbar with icons for star, plus, tree, question, gear, and bell. The main area has a title 'Delivery Agents' and a sub-section 'Recently Viewed' with a refresh icon. A message indicates '2 items • Updated a few seconds ago'. The list table has a header 'Delivery Agent Name' with a checkbox. Two items are listed: '1 ramu' and '2 Ramesh', each with a checkbox and a dropdown arrow. To the right of the list are buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. A secondary search bar at the bottom says 'Search this list...' with its own set of icons.

	Delivery Agent Name	
1	ramu	(dropdown)
2	Ramesh	(dropdown)