Phase 8: Reporting, Dashboards & Security Review

Project Title: SmartCare CRM – Salesforce-Powered Healthcare Management & Patient Engagement Suite
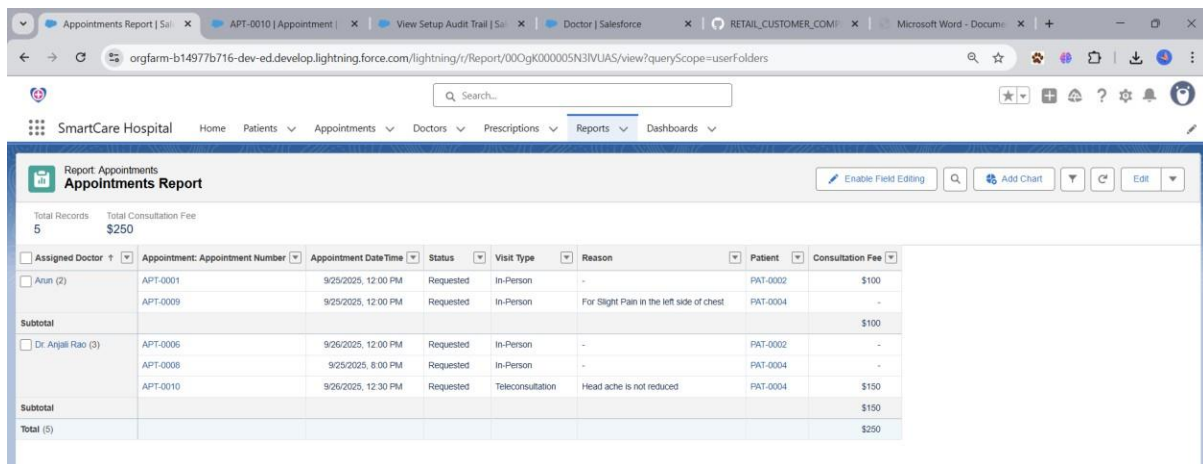
Purpose:

This phase focuses on providing business insights through analytics and demonstrating key security configurations. Custom Reports and a Dashboard were built to visualize complaint data for management. Additionally, a security review was performed, focusing on Object Permissions and the Setup Audit Trail.

1. Reporting & Analytics

To fulfill the project requirement of generating customer satisfaction reports, custom reports and a central dashboard were created. Custom Reports Custom reports were built on the Appointment object to analyze data by different criteria.

A. Appointment Report:

The screenshot below shows a report summarizing all Appointments, grouped by their Assigned Doctor and visualized with a chart to provide an immediate understanding of the support team's workload.

B. Appointment Overview Dashboard:

A central dashboard was created to provide managers with an at-a-glance view of key metrics. Components from the custom report, such as "Appointment Reports" were added to visualize the data, allowing for quick analysis and decision-making.
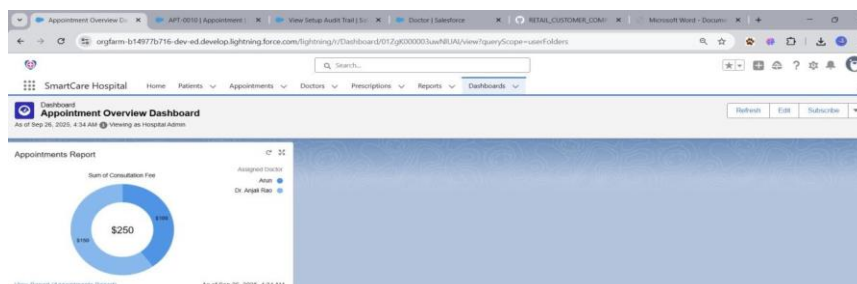
2.Security Review

A security review was performed to demonstrate how to control data access at a granular level.

A. Object Permissions

Profile permissions were reviewed to control user access to the custom objects. The screenshot below shows the configuration for the custom profiles, ensuring users have the appropriate level of access (Read, Create, Edit, Delete) to the Appointment object based on their roles.

B. Setup Audit Trail

The Setup Audit Trail was reviewed as a key tool for monitoring security and troubleshooting configuration issues.

The screenshot below shows the audit log, which tracks all recent administrative changes made to the org during the project's development, providing accountability and a history of modifications.

Conclusion

The project's reporting and security review requirements have been met, providing both business insights for management and demonstrating administrative control over the application's data and metadata.