

Phase 8: Reporting, Dashboards & Security Review

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

Purpose:

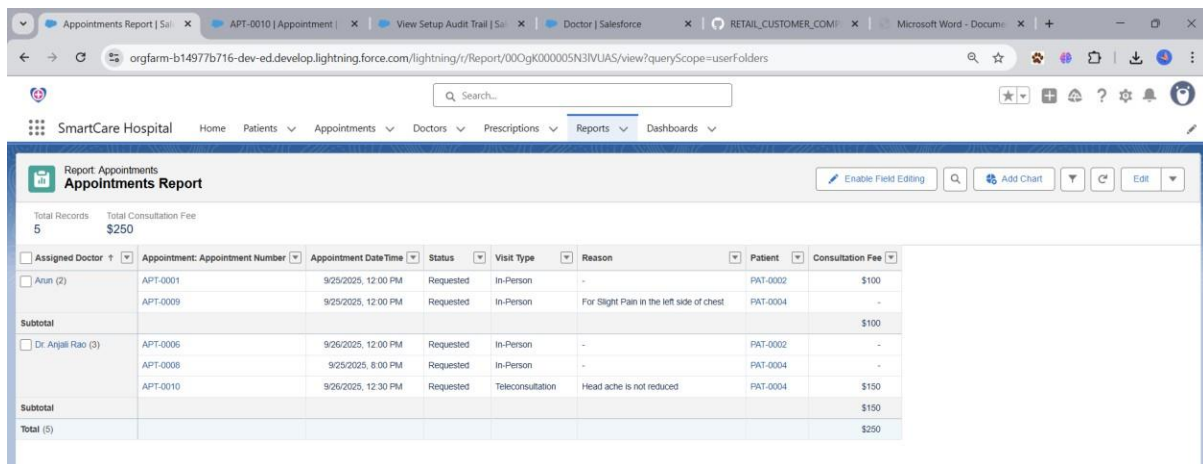
This phase focuses on providing business insights through analytics and demonstrating key security configurations. Custom Reports and a Dashboard were built to visualize complaint data for management. Additionally, a security review was performed, focusing on Object Permissions and the Setup Audit Trail.

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:

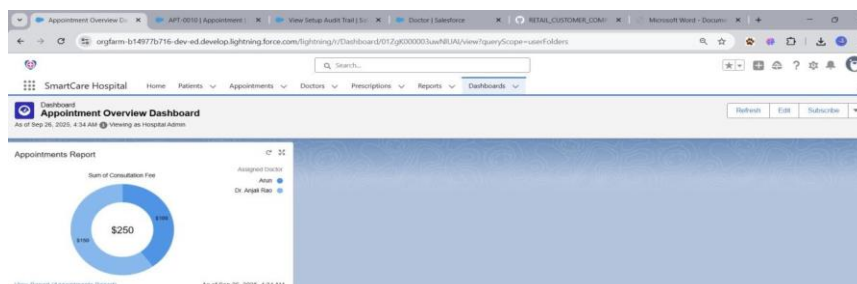
The screenshot below shows a report summarizing all Appointments, grouped by their Assigned Doctor and visualized with a chart to provide an immediate understanding of the support team's workload.



Assigned Doctor	Appointment: Appointment Number	Appointment Date Time	Status	Visit Type	Reason	Patient	Consultation Fee
Anun (2)	APT-0001	9/25/2025, 12:00 PM	Requested	In-Person	-	PAT-0002	\$100
	APT-0009	9/25/2025, 12:00 PM	Requested	In-Person	For Slight Pain in the left side of chest	PAT-0004	-
Subtotal							\$100
Dr. Anjali Rao (3)	APT-0006	9/26/2025, 12:00 PM	Requested	In-Person	-	PAT-0002	-
	APT-0008	9/25/2025, 8:00 PM	Requested	In-Person	-	PAT-0004	-
	APT-0010	9/25/2025, 12:30 PM	Requested	Teleconsultation	Head ache is not reduced	PAT-0004	\$150
Subtotal							\$150
Total (5)							\$250

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.

The screenshot shows the Salesforce Setup interface for the 'Appointment' object. The 'Object Access' section is active, displaying a table of permission sets. The table has columns for Label, API Name, Custom, Description, Read, Create, Edit, Delete, View All R..., Modify All..., and View All F... The table contains two items: 'Doctor Access' and 'Receptionist AC...'. The 'Doctor Access' row shows Read, Create, Edit, and Delete permissions as green checkmarks, while 'View All R...' and 'Modify All...' are red X's. The 'Receptionist AC...' row shows Read and Create as green checkmarks, while Edit, Delete, 'View All R...', 'Modify All...', and 'View All F...' are red X's.

Label	API Name	Custom	Description	Read	Create	Edit	Delete	View All R...	Modify All...	View All F...
Doctor Access	Doctor_Access	✓	--	✓	✓	✓	✓	✗	✗	✗
Receptionist AC...	Receptionist_AC...	✓	--	✓	✓	✓	✓	✗	✗	✗

The screenshot shows the Salesforce Setup interface for the 'Doctor' object. The 'Object Access' section is active, displaying a table of profiles. The table has columns for Label, Custom, Description, User License, Read, Create, Edit, Delete, View All R..., Modify All..., and View All F... The table contains five items: 'Analytics Cloud ...', 'Doctor_Profile', 'Receptionist_Pr...', 'System Adminis...', and 'Test profile'. The 'Analytics Cloud ...' row shows Read as a green checkmark, while Create, Edit, Delete, 'View All R...', 'Modify All...', and 'View All F...' are red X's. The 'Doctor_Profile' row shows Read, Create, Edit, and Delete as green checkmarks, while 'View All R...', 'Modify All...', and 'View All F...' are red X's. The 'Receptionist_Pr...' row shows Read, Create, Edit, and Delete as green checkmarks, while 'View All R...', 'Modify All...', and 'View All F...' are red X's. The 'System Adminis...' row shows Read, Create, Edit, and Delete as green checkmarks, while 'View All R...', 'Modify All...', and 'View All F...' are red X's. The 'Test profile' row shows Read, Create, Edit, and Delete as green checkmarks, while 'View All R...', 'Modify All...', and 'View All F...' are red X's.

Label	Custom	Description	User License	Read	Create	Edit	Delete	View All R...	Modify All...	View All F...
Analytics Cloud ...	--	Analytics Cloud ...	Analytics Cloud ...	✓	✗	✗	✗	✓	✗	✗
Doctor_Profile	✓	--	Salesforce	✓	✓	✓	✓	✗	✗	✗
Receptionist_Pr...	✓	--	Salesforce	✓	✓	✓	✓	✗	✗	✗
System Adminis...	--	--	Salesforce	✓	✓	✓	✓	✓	✓	✗
Test profile	✓	--	Salesforce	✓	✓	✓	✓	✓	✓	✗

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.

The screenshot displays the Salesforce Setup Audit Trail interface. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'View Setup Audit Trail' and includes a search bar and a 'Help for this Page' link. Below the title, a message states: 'The last 20 entries for your organization are listed below. You can [download](#) your organization's setup audit trail for the last six months (Excel .csv file).' The table below lists the audit trail entries.

Date	User	Source Namespace Prefix	Action	Section	Delegate User ?
9/26/2025, 2:59:38 AM PDT	admin@smartscale.com		Changed DoctorIntegration Apex Class code	Apex Class	
9/26/2025, 2:59:24 AM PDT	admin@smartscale.com		Created DoctorIntegration Apex Class code	Apex Class	
9/26/2025, 2:56:53 AM PDT	admin@smartscale.com		Remote Proxy insert JSOnPlaceholderAPI: https://yourplaceholder.typecode.com	Security Controls	
9/26/2025, 2:05:24 AM PDT	admin@smartscale.com		Changed Lightning Page: SmartCare Hospital UtilityBar	Lightning Pages	
9/26/2025, 1:11:44 AM PDT	admin@smartscale.com		Added standard button override: Tab (Lightning Page null)	Standard Buttons and Links	
9/26/2025, 1:11:25 AM PDT	admin@smartscale.com		Created Lightning Page: SmartCare Home	Lightning Pages	
9/26/2025, 12:55:30 AM PDT	admin@smartscale.com		Created Lightning Page: Appointment Record Page	Lightning Pages	
9/26/2025, 12:36:52 AM PDT	admin@smartscale.com		Created Action on Patients: Update_Patient	Global Actions	
9/25/2025, 12:19:46 PM PDT	admin@smartscale.com		Changed DoctorService Apex Class code	Apex Class	
9/25/2025, 12:12:52 PM PDT	admin@smartscale.com		Created DoctorService Apex Class code	Apex Class	
9/25/2025, 12:12:39 PM PDT	admin@smartscale.com		Deleted DoctorQueryClass Apex Class code	Apex Class	
9/25/2025, 11:54:06 AM PDT	admin@smartscale.com		Created DoctorQueryClass Apex Class code	Apex Class	
9/25/2025, 11:53:44 AM PDT	admin@smartscale.com		Deleted SimpleQueryClass Apex Class code	Apex Class	
9/25/2025, 11:50:39 AM PDT	admin@smartscale.com		Created SimpleQueryClass Apex Class code	Apex Class	
9/25/2025, 11:19:52 AM PDT	admin@smartscale.com		Changed Appointment Trigger code: AppointmentTrigger	Apex Trigger	
9/25/2025, 11:19:24 AM PDT	admin@smartscale.com		Created Appointment Trigger code: AppointmentTrigger	Apex Trigger	
9/25/2025, 10:47:23 AM PDT	admin@smartscale.com		Deactivated flow version #2 "Alert For Doctor Flow" for flow with Unique Name "Alert_For_Doctor_Flow"	Flows	
9/25/2025, 10:47:23 AM PDT	admin@smartscale.com		Activated flow version #3 "Alert For Doctor Flow" for flow with Unique Name "Alert_For_Doctor_Flow"	Flows	
9/25/2025, 10:47:14 AM PDT	admin@smartscale.com		Created flow version #3 "Alert For Doctor Flow" for flow with Unique Name "Alert_For_Doctor_Flow"	Flows	
9/25/2025, 10:45:47 AM PDT	admin@smartscale.com		Deactivated flow version #4 "Alert For Doctor Flow" for flow with Unique Name "Alert_For_Doctor_Flow"	Flows	

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.