

Phase 8: Reporting, Dashboards & Security Review

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

Purpose:

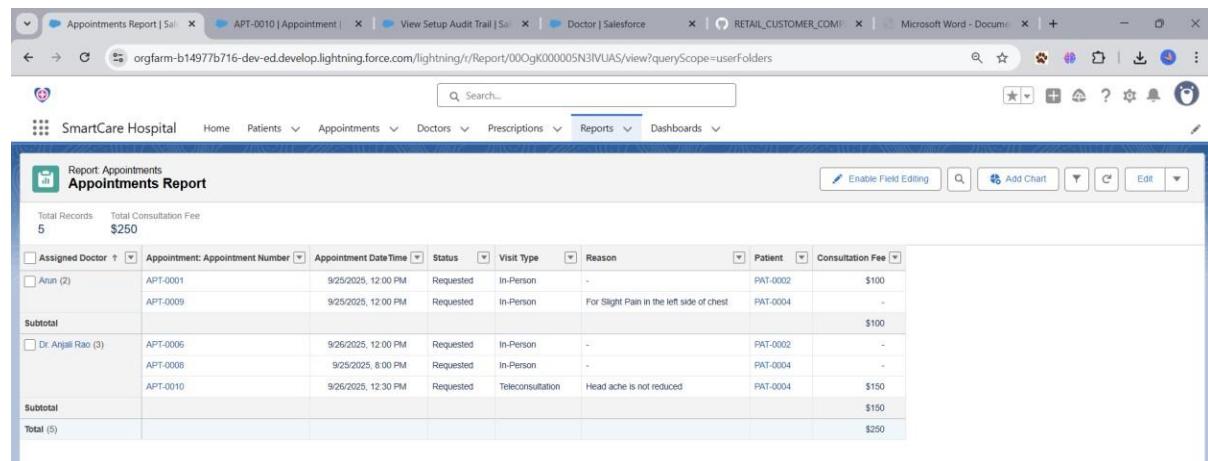
This phase focuses on providing business insights through analytics and demonstrating key security configurations. Custom Reports and a Dashboard were built to visualize complaint data for management. Additionally, a security review was performed, focusing on Object Permissions and the Setup Audit Trail.

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:

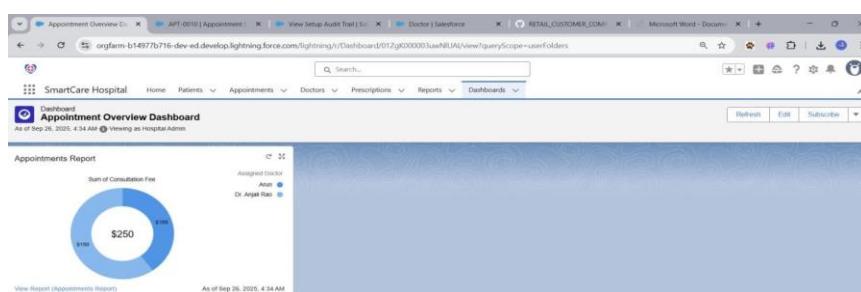
The screenshot below shows a report summarizing all Appointments, grouped by their Assigned Doctor and visualized with a chart to provide an immediate understanding of the support team's workload.



Report: Appointments							
Appointments Report							
Total Records	Total Consultation Fee						
5	\$250						
Assigned Doctor	Appointment Number	Appointment Date/Time	Status	Visit Type	Reason	Patient	Consultation Fee
<input type="checkbox"/> Arun (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	-
							\$100
<input type="checkbox"/> 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	9/26/2025, 12:30 PM	Requested	Teleconsultation	Head ache is not reduced	PAT-0004	\$150
							\$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 image contains two screenshots of the Salesforce Object Manager interface, both titled "Object Access".

Appointment Object Access: This screenshot shows the "Object Access" page for the "Appointment" object. It displays a table of permission sets and profiles. The table has columns for Label, API Name, Custom, Description, Read, Create, Edit, Delete, View All Rows, Modify All Rows, and View All Files. Two permission sets are listed: "Doctor Access" and "Receptionist Access". Under "Doctor Access", "Read" and "Edit" are checked for all profiles. Under "Receptionist Access", "Read" and "Edit" are checked for the "Receptionist_Pr..." profile, while "Create" is checked for the "Doctor_Profile" profile.

Label	API Name	Custom	Description	Read	Create	Edit	Delete	View All Rows	Modify All Rows	View All Files
Doctor Access	Doctor_Access	✓	--	✓	✗	✓	✗	✗	✗	✗
Receptionist Access	Receptionist_Access	✓	--	✓	✓	✓	✗	✗	✗	✗

Doctor Object Access: This screenshot shows the "Object Access" page for the "Doctor" object. It displays a table of permission sets and profiles. The table has columns for Label, Custom, Description, User License, Read, Create, Edit, Delete, View All Rows, Modify All Rows, and View All Files. Five profiles are listed: "Analytics Cloud ...", "Doctor_Profile", "Receptionist_Pr...", "System Adminis...", and "Test profile". Under "Analytics Cloud ...", "Read" and "Edit" are checked. Under "Doctor_Profile", "Create" and "Edit" are checked. Under "Receptionist_Pr...", "Create" and "Edit" are checked. Under "System Adminis...", "Create" and "Edit" are checked. Under "Test profile", "Read", "Create", and "Edit" are checked.

Label	Custom	Description	User License	Read	Create	Edit	Delete	View All Rows	Modify All Rows	View All Files
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 shows the 'View Setup Audit Trail' page in the Salesforce Setup interface. The page title is 'View Setup Audit Trail'. It displays a table of the last 20 entries for the organization, listing actions such as changing DoctorIntegration Apex Class code, creating Lightning Pages, and modifying DoctorService Apex Class code. The table includes columns for Date, User, Source Namespace Prefix, Action, Section, and Delegate User.

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/26/2025, 2:59:38 AM PDT	admin@smartcare.com		Changed DoctorIntegration Apex Class code	Apex Class	
9/26/2025, 2:59:24 AM PDT	admin@smartcare.com		Created DoctorIntegration Apex Class code	Apex Class	
9/26/2025, 2:58:53 AM PDT	admin@smartcare.com		Remote Proxy insert JSONPlaceholderAPI: https://jsonplaceholder.typicode.com	Security Controls	
9/26/2025, 2:05:24 AM PDT	admin@smartcare.com		Changed Lightning Page: SmartCare Hospital UtilityBar	Lightning Pages	
9/26/2025, 1:11:44 AM PDT	admin@smartcare.com		Added standard button override: Tab (Lightning Page null)	Standard Buttons and Links	
9/26/2025, 1:11:25 AM PDT	admin@smartcare.com		Created Lightning Page: SmartCare Home	Lightning Pages	
9/26/2025, 12:55:30 AM PDT	admin@smartcare.com		Created Lightning Page: Appointment Record Page	Lightning Pages	
9/26/2025, 12:36:52 AM PDT	admin@smartcare.com		Created Action on Patients: Update_Patient	Global Actions	
9/25/2025, 12:19:46 PM PDT	admin@smartcare.com		Changed DoctorService Apex Class code	Apex Class	
9/25/2025, 12:12:52 PM PDT	admin@smartcare.com		Created DoctorService Apex Class code	Apex Class	
9/25/2025, 12:12:39 PM PDT	admin@smartcare.com		Deleted DoctorQueryClass Apex Class code	Apex Class	
9/25/2025, 11:54:06 AM PDT	admin@smartcare.com		Created DoctorQueryClass Apex Class code	Apex Class	
9/25/2025, 11:53:44 AM PDT	admin@smartcare.com		Deleted SimpleQueryClass Apex Class code	Apex Class	
9/25/2025, 11:50:39 AM PDT	admin@smartcare.com		Created SimpleQueryClass Apex Class code	Apex Class	
9/25/2025, 11:19:52 AM PDT	admin@smartcare.com		Changed Appointment Trigger code: AppointmentTrigger	Apex Trigger	
9/25/2025, 11:19:24 AM PDT	admin@smartcare.com		Created Appointment Trigger code: AppointmentTrigger	Apex Trigger	
9/25/2025, 10:47:23 AM PDT	admin@smartcare.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@smartcare.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@smartcare.com		Created flow version #3 "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.