

Phase 9: Reports, Dashboards & Analytics

7.1 Custom Report Types

7.1.1 Appointment Analysis Report Type

Steps to Create:

- Setup → Report Types → New Custom Report Type
- Primary Object: **Appointment**
- Report Type Label: **Appointment Analysis**
- Report Type Name: **Appointment_Analysis**
- Description: Comprehensive appointment reporting with patient and doctor details
- Category: **Appointments**

Object Relationships:

- Appointments (Primary)
- Patients (Contacts) – Master-Detail
- Doctors – Master-Detail
- Medical Cases – Lookup
- Bills – Lookup

Available Fields:

- Appointment fields
- Patient demographics
- Doctor specialization and details
- Case information
- Billing status and amounts

7.1.2 Patient Medical History Report Type

- Primary Object: **Contact (Patient)**
 - Secondary Objects:
 - Medical Cases
 - Appointments
 - Bills
-

7.2 Standard Reports

7.2.1 Daily Appointment Schedule Report

- Report Type: **Appointment Analysis**
- Format: **Summary**
- Group By: **Doctor Name** → **Appointment Time**
- Filters: Appointment Date = TODAY, Status = (Scheduled, Confirmed, In Progress)

Columns:

- Appointment Time, Patient Name, Phone, Appointment Type, Status, Duration, Reason

Steps:

1. Reports → New Report → Select Appointment Analysis
 2. Add filters (Today's date, status)
 3. Group by Doctor Name
 4. Add summary → Count of Appointments
 5. Save as **"Daily Appointment Schedule"**
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7.2.2 Monthly Revenue Report

- Report Type: **Bill Information with Patients and Doctors**
- Format: **Summary**
- Group By: Bill Date (Month) → Doctor Name
- Filters: Bill Date = Current Fiscal Year

Columns:

Bill Date, Patient, Doctor, Consultation Fee, Total, Paid, Payment Status

Summaries:

- Total Amount (Sum)
 - Amount Paid (Sum)
 - Outstanding Balance (Sum)
-

7.2.3 Patient No-Show Analysis

- Report Type: **Appointment Analysis**
- Format: **Summary**
- Filters: Status = "No Show", Appointment Date = Last 30 Days

- Group By: Patient Name

Columns:

Patient Name, Phone, Appointment Date, Doctor, Type

Summary:

Count of No-Shows per Patient

7.2.4 Doctor Performance Report

- Report Type: **Appointment Analysis**
- Format: **Matrix**
- Row Grouping: **Doctor Name**
- Column Grouping: **Appointment Status**
- Date Filter: Last 3 Months

Metrics:

- Total Appointments
 - Completion Rate
 - Average Consultation Fee
-

7.3 Dashboard Creation

7.3.1 Clinical Operations Dashboard

Name: Clinical Operations Dashboard

Components:

1. **Today's Appointments (Table)** – Source: Daily Appointment Schedule
 2. **Appointment Status Summary (Donut)** – Groups: Appointment Status
 3. **Monthly Revenue Trend (Line Chart)** – Source: Monthly Revenue Report
 4. **Top Performing Doctors (Horizontal Bar)** – Source: Doctor Performance Report
 5. **Patient No-Show Rate (Gauge)** – Source: No-Show Analysis Report
 - Green (0–10%), Yellow (10–20%), Red (20–30%)
 6. **Outstanding Bills (Lightning Table)** – Source: Outstanding Bills Report
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7.3.2 Doctor Performance Dashboard

Name: Doctor Performance Dashboard

Components:

1. **My Today's Appointments (Table)** – Filter by Running User (Doctor)
 2. **My Patient Case Load (Metric)** – Count of Open Medical Cases
 3. **My Monthly Stats (Lightning Table)** – Includes:
 - Total Appointments This Month
 - Revenue Generated
 - Patient Satisfaction Score
 - Case Closure Rate
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7.4 Advanced Analytics Setup

7.4.1 Einstein Analytics (if available)

Dataset Creation:

- Setup → Analytics Studio → Data Manager → Create Dataset
- Dataset Name: **Clinic Operations Dataset**
- Source: Salesforce Objects

Objects Included:

- Appointments with Patient & Doctor details
- Medical Cases with outcomes
- Bills with payments

Dashboard Recipes:

1. **Patient Journey Analysis** – Track patient flow from first appointment to treatment completion
 2. **Resource Utilization** – Doctor schedules & appointment optimization
 3. **Financial Performance** – Revenue trends, collections, profitability
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Some sample Reports And DashBoards

HealHub

HomeAccountsContactsCalendarCasesAppointmentsBill InformationsDoctorsMedical CasesHome

patient dashboard

+ Widget+ FilterSave

Patent report

Salutation ↑	First Name	Last Name	Title	Account Name
-	Nisha	Kumar	-	-
-	Sameer	Joshi	-	-
-	Divya	Naik	-	-
-	Rohit	Kamble	-	-
-	Anjali	Patil	-	-
-	Manish	Gowda	-	-
-	Priya	Sharma	-	-

View Report (Patent report)

HealHub

HomeAccountsContactsCalendarCasesAppointmentsBill InformationsDoctorsMedical CasesHome

Search...

Appointments

appointment

+ Widget+ FilterSave

Appointments

Record Count

10

View Report (Appointments)

Appointments

Record Count

4

6

View Report (Appointments)