Phase 9: Reporting, Dashboards & Security Review

Objective

To provide **real-time insights** into donations, events, and volunteer participation using Salesforce **Reports & Dashboards**, while ensuring **data security and role-based access control** through Profiles, Permission Sets, and FLS (Field-Level Security).

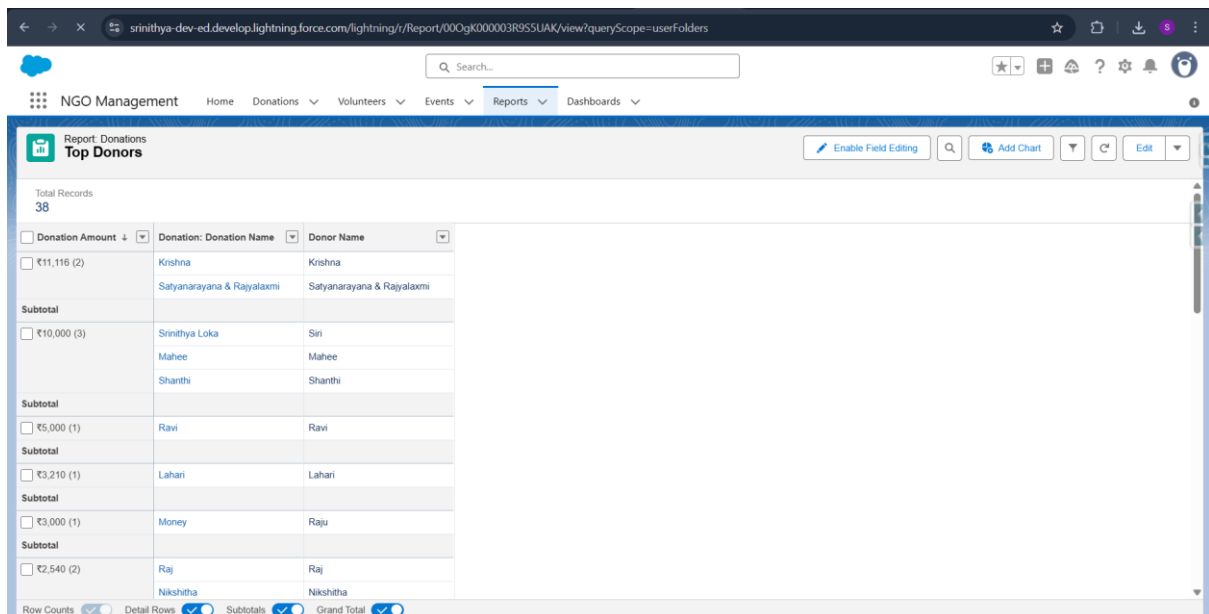## Reports Implemented

1. **Top Donors Report**

   o Lists donors contributing the highest amounts.

   o Helps identify and acknowledge key supporters.

2. **Donations by Occasion Report**

   o Breaks down donations by reason/occasion (Birthday, Anniversary, Festival).

   o Identifies seasonal trends.
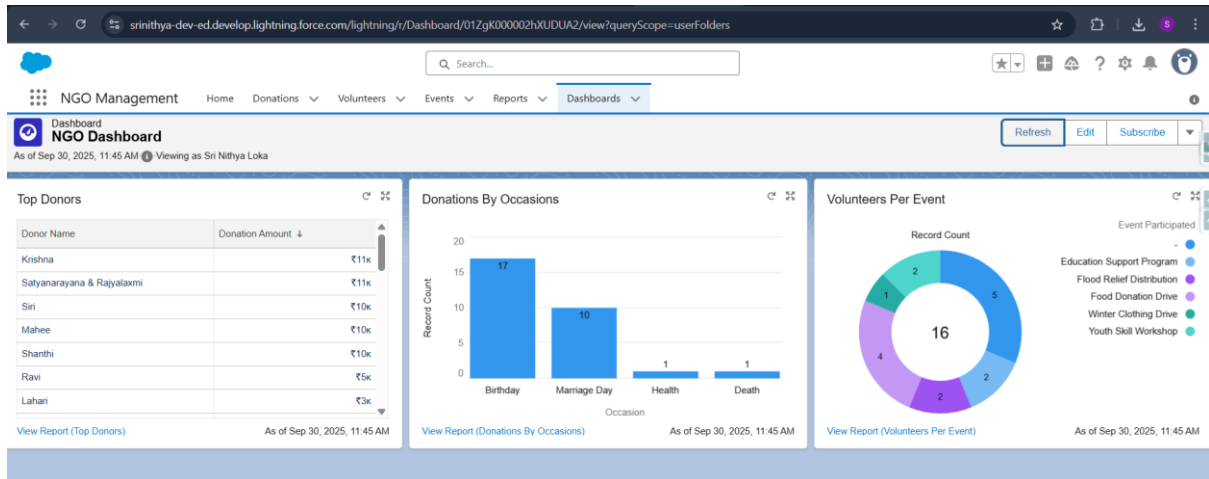
3. **Volunteers by Event Report**

   o Shows number of volunteers assigned per event.

   o Ensures events are adequately staffed.

Dashboards Implemented

- **Donations by Occasion (Bar Chart)** → Visualizes donation patterns.

- **Volunteers by Event (Donut Chart)** → Quick glance at volunteer distribution.

- **Top Donors (Lightning Table)** → Highlights recurring/high-value donors.

All dashboards are role-based: NGO Admins see all, while Donor Managers & Volunteer Coordinators see only relevant metrics.

Security Review

1. Profiles & Roles

- **NGO Admin** → Full Access (all objects, reports, dashboards).

- **Donor Manager** → Manage donations, view related events.

- **Volunteer Coordinator** → Manage volunteers, view related events.

2. Field-Level Security (FLS)

- Sensitive fields (e.g., donor contact info, phone, email) restricted to authorized users.

- Non-relevant fields hidden for lower-level roles.

3. Tab & Record Access

- Controlled using **Profiles & Permission Sets**.

- Donor Manager → Donation tab visible, Volunteer tab hidden.

- Volunteer Coordinator → Volunteer tab visible, Donation tab hidden.

4. Validation & Data Integrity

- Validation rules prevent invalid entries (emails, phone numbers, donation amount).

- Ensures data reliability for reporting.

Tabular Summary

Component	Type	Purpose
Top Donors Report	Tabular/Matrix Report	Identify recurring & high-value donors.
Donations by Occasion Report	Summary Report	Analyze donation patterns by occasion.
Volunteers by Event Report	Summary Report	Track volunteer participation per event.
Donations by Occasion Dashboard	Bar Chart	Visualize seasonal donation trends.
Volunteers by Event Dashboard	Donut Chart	Show distribution of volunteers across events.
Top Donors Dashboard	Lightning Table	Highlight top supporters for recognition.
Profiles & Roles	Security Control	Restrict access based on role (Admin, Donor Manager, Volunteer Coordinator).
Field-Level Security	Security Control	Limit sensitive data visibility.

Benefits

- Provides **data-driven insights** for NGO decision-making.
- Enhances **donor & volunteer engagement** with trend analysis.
- Strengthens **security & compliance** with role-based access.
- Ensures only **authorized users** can view/edit sensitive information.