

# Phase 9 : Reporting, Dashboards & Security Review

A comprehensive guide to implementing custom reports, dashboards, and security configurations for your pharmacy management system in Salesforce.

## Part 1: Reports & Dashboards

### Custom Report Types

Create foundation for data analysis with Prescription and Product relationships

### Three Key Reports

Build tabular, summary, and matrix reports for comprehensive insights

### Performance Dashboard

Centralise all reports into a command centre view for pharmacy operations

### 1.1 Custom Report Type Creation

To analyse your Prescription and Product data, you will create a custom report type.

#### Configuration Details

##### For Your Project

|                       |  |
|-----------------------|--|
| <b>Name</b>           | Prescriptions with Products  |
| <b>Primary Object</b> | Prescription (Prescription__c)   |
| <b>Related Object</b> | Product (Product__c)   |
| <b>Relationship</b>   | Each "A" record (Prescription) must have at least one related "B" record (Product) |

### 1.2 Report Creation

You will create and save all your reports in a new folder named "**Pharma Reports**".

#### New product with Prescriptions Report

- **Type:** Tabular. This report will be a simple list.
- **Report Type Used:** Prescriptions with Products.
- **Key Columns:** Add the Prescription Name, Patient: Full Name, and Product: Name columns.
- **Filter:** Add a filter for Prescription Date and set it to equals TODAY.

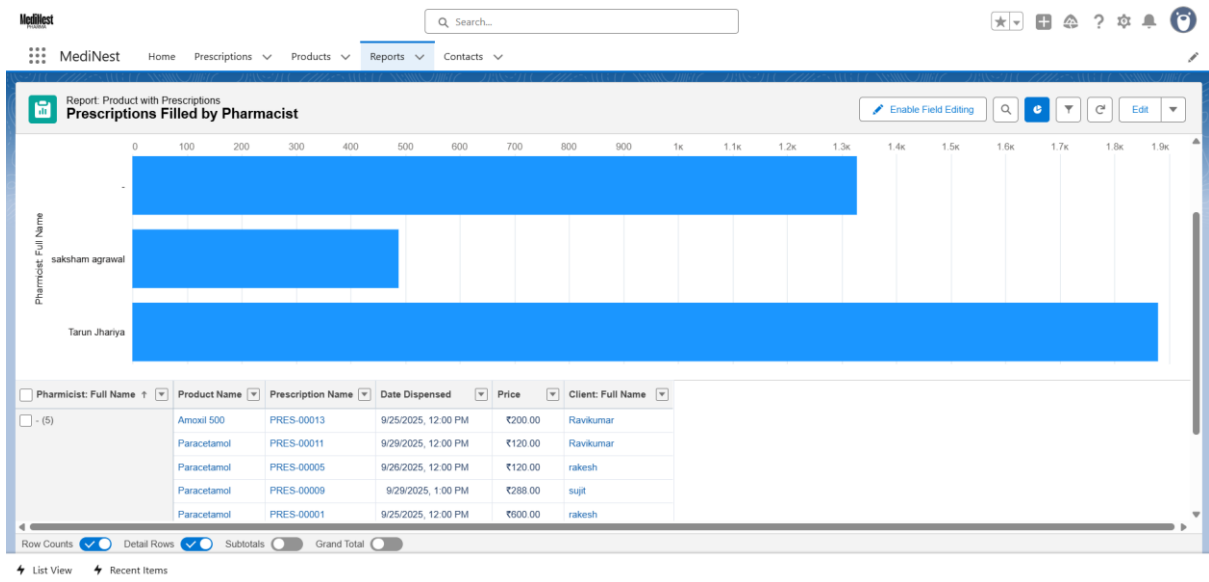
#### Dispensed Medication by Pharmacist


- **Type:** Summary. This report will group your data.
- **Report Type Used:** Prescriptions with Products.

- **Group By:** Drag the Created By field into the Group Rows section. This groups the prescriptions by the pharmacist who created the record.
- **Filter:** Add a filter for Prescription Date and set it to equals This Week.
- **Visualisation:** Add a Bar Chart to visually compare the number of prescriptions filled by each pharmacist.

**Prescription filled by Phaemacist**

- **Type:** Matrix. This report will group by rows and columns.
- **Report Type Used:** Prescriptions with Products.
- **Row Grouping:** Group the rows by Product: Name.
- **Column Grouping:** Group the columns by Prescription Date and set the grouping to Calendar Week.
- **Summarised Field:** In the columns section, add your Price field and set the summary to Sum. This will show the total revenue for each product per week.





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MediNest

Home

Prescriptions

Products

Reports

Contacts

Report: Product with Prescriptions

New Product with Prescriptions Report

Enable Field Editing

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Add Chart

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Edit

Total Records  
6

|   | Product Name | Prescription Name | Date Dispensed      | Client: Full Name  |
|---|--------------|-------------------|---------------------|--------------------|
| 1 | Paracetamol  | PRES-00001        | 9/25/2025, 12:00 PM | rakesh             |
| 2 | Paracetamol  | PRES-00005        | 9/26/2025, 12:00 PM | rakesh             |
| 3 | Paracetamol  | PRES-00012        | 9/26/2025, 4:00 PM  | Ravikumar          |
| 4 | Amoxil 500   | PRES-00010        | 9/27/2025, 2:00 PM  | sujit              |
| 5 | Amoxil 500   | PRES-00013        | 9/25/2025, 12:00 PM | Ravikumar          |
| 6 | Amoxil 500   | PRES-00016        | 9/25/2025, 3:00 PM  | pushpendra jhariya |

List View

Recent Items



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MediNest

Home

Prescriptions

Products

Reports

Contacts

Report: Product with Prescriptions

Dispensed Medications by Pharmacist

Enable Field Editing

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Edit

0

0

3

2

saksham agrawal

Tarun Jhariya

Pharmacist: Full Name

| Pharmacist: Full Name                    | Product Name → | Amoxil 500 | Paracetamol | Total |
|--|----------------|------------|-------------|-------|
| <input type="checkbox"/> -               | Record Count   | 1          | 4           | 5     |
| <input type="checkbox"/> saksham agrawal | Record Count   | 1          | 2           | 3     |
| <input type="checkbox"/> Tarun Jhariya   | Record Count   | 1          | 1           | 2     |
| Total                                    | Record Count   | 3          | 7           | 10    |

Details (10 Rows) Click an intersection in the table above to filter details.

| Prescription Name |
|-------------------|
| 1 PRES-00013      |
| 2 PRES-00011      |
| 3 PRES-00001      |
| 4 PRES-00009      |
| 5 PRES-00005      |

Row Counts

Detail Rows

Grand Total

Stacked Summaries

List View

Recent Items

### 1.3 Dashboard Configuration

You will create a central dashboard to provide a command centre view of your pharmacy's performance.

#### Dashboard Setup

- **Name:** Pharmacy Performance Dashboard
- **Folder:** Save it in a new folder named PharmaFlow Dashboards

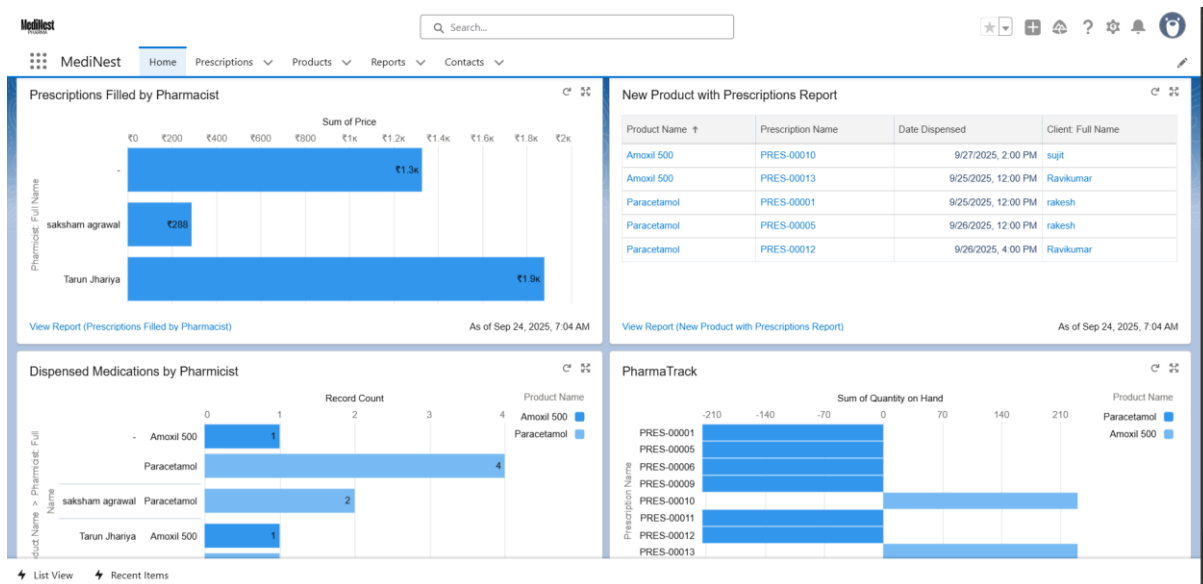
### 1.4 Dashboard Finalisation

#### Dynamic Dashboard

To ensure each pharmacist sees their own data, set the **"View Dashboard As"** to **The logged-in user**.

#### Home Page Integration

Use the **Lightning App Builder** to add the completed dashboard to your **MediNest** Home Page for immediate visibility upon login.



## Part 2: Security Review

### Time Zone Configuration

Set org-wide and personal time zones to India Standard Time

### Field Level Security

Restrict price field modifications for pharmacist profiles

### Login IP Ranges

Limit access to pharmacy network IP addresses only

### Session Settings

Configure automatic logout for enhanced security

### 2.1 Time Zone Configuration & 2.2 Field Level Security

#### Time Zone Setup

- **Org-Wide Default:** Go to Setup > Company Information and set the default time zone to **(GMT+05:30) India Standard Time**.
- **Personal User Setting:** Go to your personal settings and verify that your own time zone is also set to **(GMT+05:30) India Standard Time**.

#### Field Level Security (FLS)

**Objective:** To prevent pharmacists or other users from manually changing the price of a product.

#### Action:

1. Go to Setup > Profiles.
2. Select the Pharmacist profile.
3. Find and click on the Product object.
4. Find the Price field and ensure that only the Read-Only box is checked for this profile.

## 2.3 Login IP Ranges & 2.4 Session Settings Review

### Login IP Ranges

**Objective:** To restrict access to your Salesforce org to only the computers within your pharmacy's network.

**Action:**

1. Go to Setup > Profiles.
2. Select the Pharmacist profile.
3. Scroll down to the Login IP Ranges section and click New.
4. Enter the starting and ending IP addresses of your pharmacy's network.

### Session Settings Review

**Objective:** To improve security by automatically logging out inactive users.

**Action:**

1. Go to Setup > Session Settings.
2. Find the Timeout Value and set it to a more secure duration, such as **1 Hour**. This is especially important for shared computers at a reception desk.

### Implementation Complete

#### Reports & Dashboards

Custom report types, three key reports, and centralised performance dashboard now provide comprehensive pharmacy insights

#### Security Configuration

Time zones, field-level security, IP restrictions, and session timeouts ensure secure pharmacy operations

#### Ready for Production

Your PharmaFlow Salesforce implementation is now configured for optimal performance and security

Your pharmacy management system is now fully configured and ready to streamline operations whilst maintaining the highest security standards.