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

Four Key Reports

Build tabular, summary, matrix and joined 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

Name	Prescriptions with Products
Primary Object	Prescription (Prescription__c)
Related Object	Product (Product__c)
Relationship	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".

01

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.

02

Dispensed Medications by Pharmicist

- **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.

03

Prescriptions filled by Pharmacist

- **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.

Report: Product with Prescriptions
Prescriptions Filled by Pharmacist

✏ Enable Field Editing   Edit
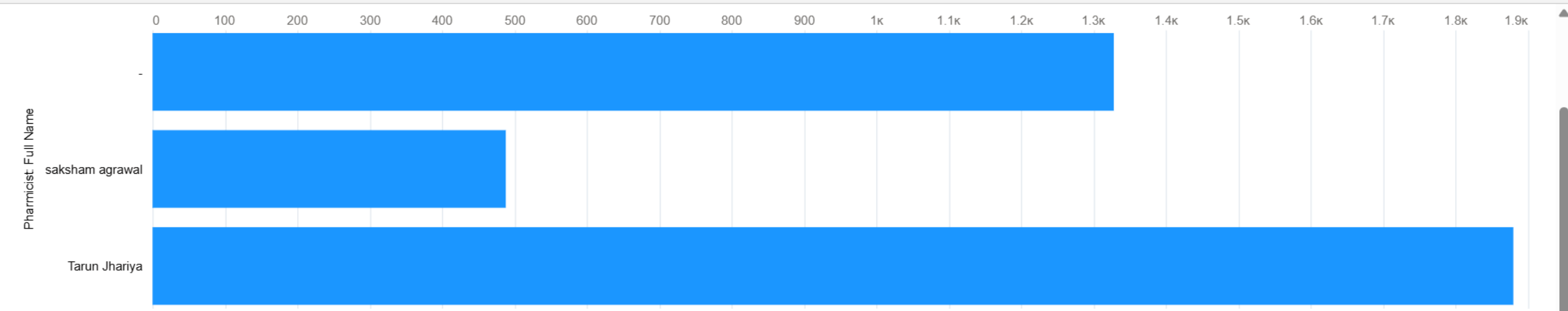
	Pharmicist: Full Name ↑ ▾	Product Name ▾	Prescription Name ▾	Date Dispensed ▾	Price ▾	Client: Full Name ▾	
☐	- (5)	Amoxil 500	PRES-00013	9/25/2025, 12:00 PM	₹200.00	Ravikumar	
		Paracetamol	PRES-00011	9/29/2025, 12:00 PM	₹120.00	Ravikumar	
		Paracetamol	PRES-00005	9/26/2025, 12:00 PM	₹120.00	rakesh	
		Paracetamol	PRES-00009	9/29/2025, 1:00 PM	₹288.00	sujit	
		Paracetamol	PRES-00001	9/25/2025, 12:00 PM	₹600.00	rakesh	

Row Counts ⬤   Detail Rows ⬤   Subtotals ◯   Grand Total ◯

⚡ List View   ⚡ Recent Items

Search...

Report: Product with Prescriptions
New Product with Prescriptions Report

✎ Enable Field Editing   Add Chart   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

Report: Product with Prescriptions
Dispensed Medications by Pharmicist

Enable Field Editing   Edit

3

2

saksham agrawal

Tarun Jhariya

0

Pharmicist: Full Name

Pharmicist: Full Name	Product Name →	Amoxil 500	Paracetamol	Total
-	Record Count	1	4	5
saksham agrawal	Record Count	1	2	3
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
6	PRES-00016

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

Components

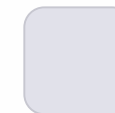Add the following reports as components to the dashboard canvas:

Prescriptions Filled by Pharmacist

(use the Bar Chart)

Dispensed Medications by Pharmicist

(use the Matrix chart)

New Product with Prescriptions Report

(use a Lightning Table)

1.4 Dashboard Finalisation
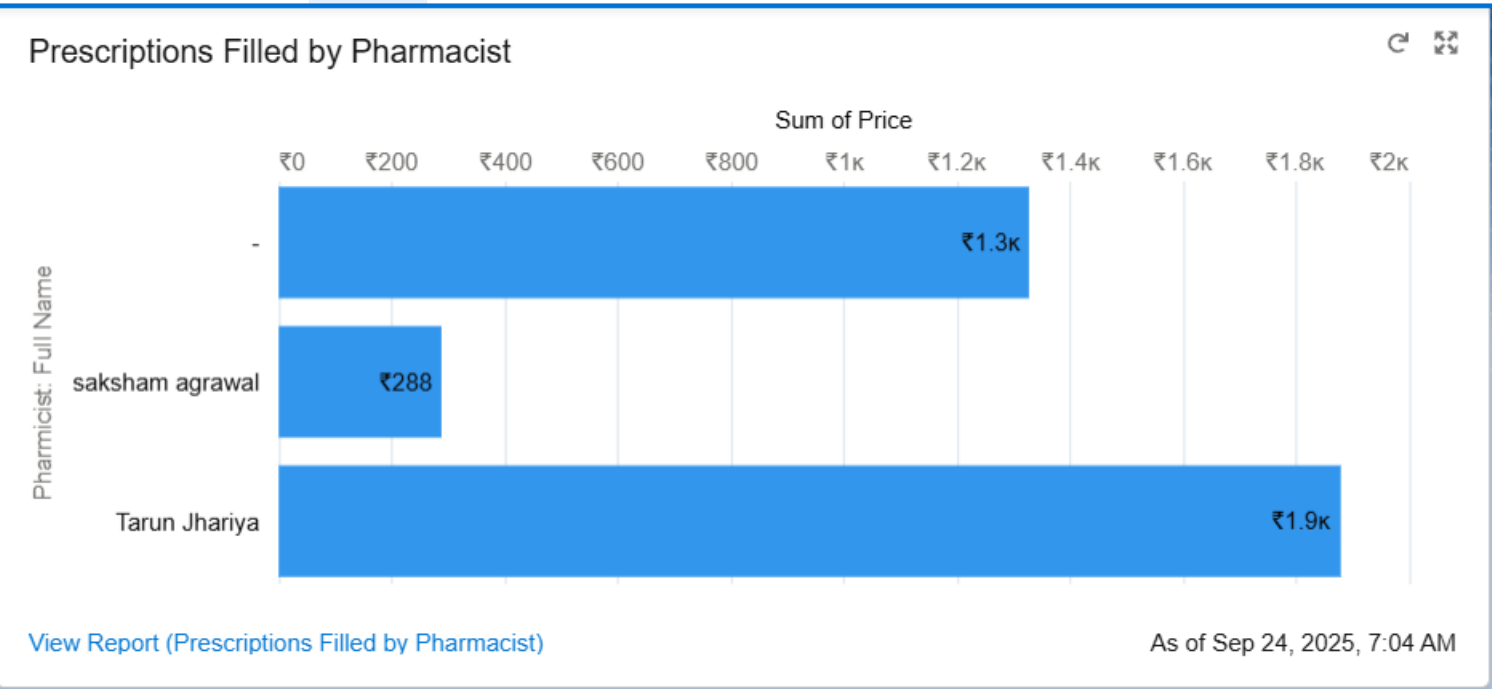
1

Dynamic Dashboard

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

2

Home Page Integration

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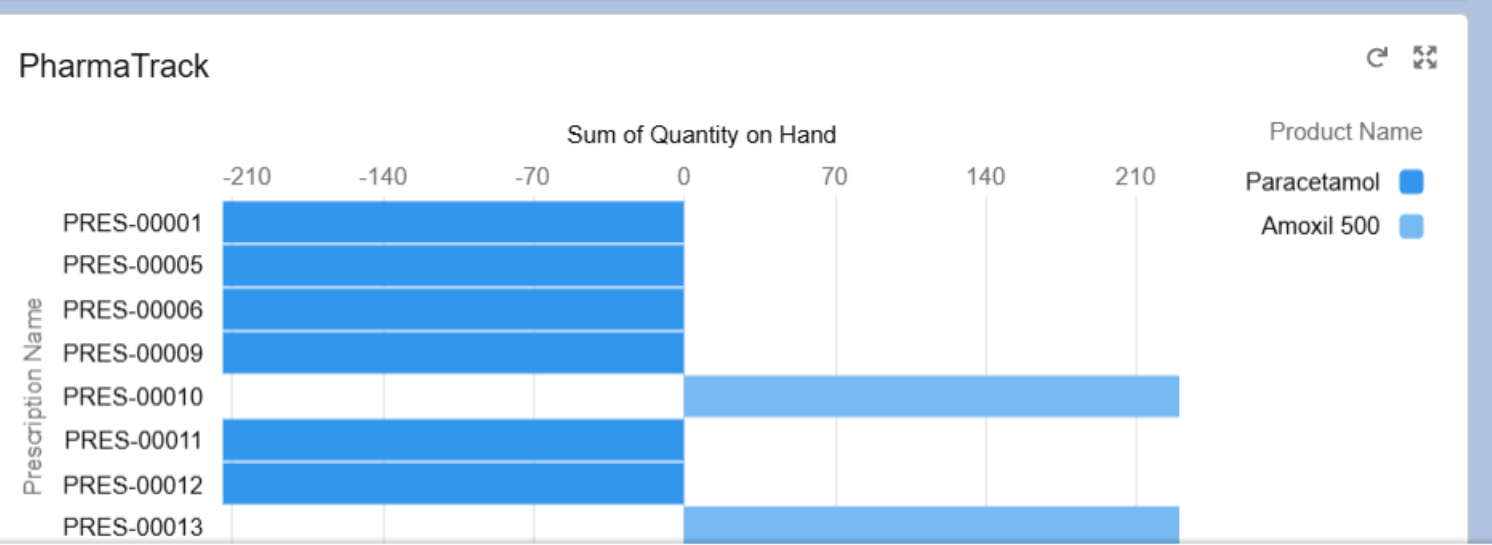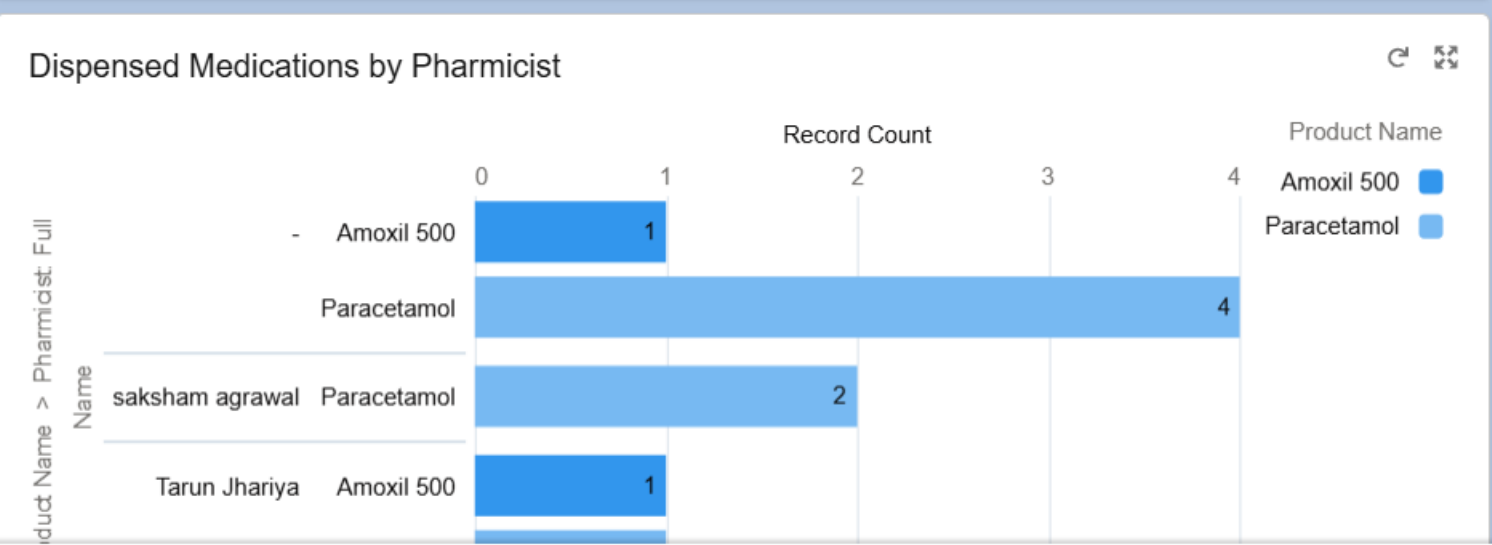
Prescriptions Filled by Pharmacist

Sum of Price

Pharmacist: Full Name	Sum of Price
-	₹1.3ᴋ
saksham agrawal	₹288
Tarun Jhariya	₹1.9ᴋ

Scale: ₹0 ₹200 ₹400 ₹600 ₹800 ₹1ᴋ ₹1.2ᴋ ₹1.4ᴋ ₹1.6ᴋ ₹1.8ᴋ ₹2ᴋ

View Report (Prescriptions Filled by Pharmacist)   As of Sep 24, 2025, 7:04 AM

New Product with Prescriptions Report

Product Name ↑	Prescription Name	Date Dispensed	Client: Full Name
Amoxil 500	PRES-00010	9/27/2025, 2:00 PM	sujit
Amoxil 500	PRES-00013	9/25/2025, 12:00 PM	Ravikumar
Paracetamol	PRES-00001	9/25/2025, 12:00 PM	rakesh
Paracetamol	PRES-00005	9/26/2025, 12:00 PM	rakesh
Paracetamol	PRES-00012	9/26/2025, 4:00 PM	Ravikumar

View Report (New Product with Prescriptions Report)   As of Sep 24, 2025, 7:04 AM

Dispensed Medications by Pharmicist

Record Count

Product Name: Amoxil 500, Paracetamol

Pharmicist: Full Name > Product Name	Record Count
- / Amoxil 500	1
Paracetamol	4
saksham agrawal / Paracetamol	2
Tarun Jhariya / Amoxil 500	1

PharmaTrack

Sum of Quantity on Hand

Product Name: Paracetamol, Amoxil 500

Scale: -210 -140 -70 0 70 140 210

Prescription Name	Sum of Quantity on Hand
PRES-00001	
PRES-00005	
PRES-00006	
PRES-00009	
PRES-00010	
PRES-00011	
PRES-00012	
PRES-00013	

⚡ List View   ⚡ Recent Items

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.
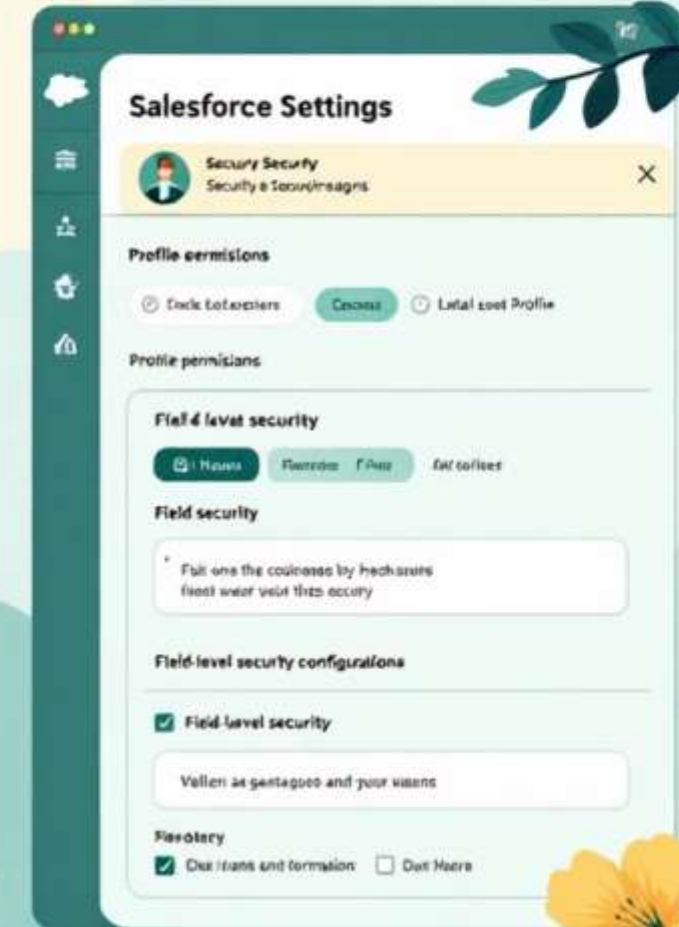
2.3 Login IP Ranges & 2.4 Session Settings Review

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.