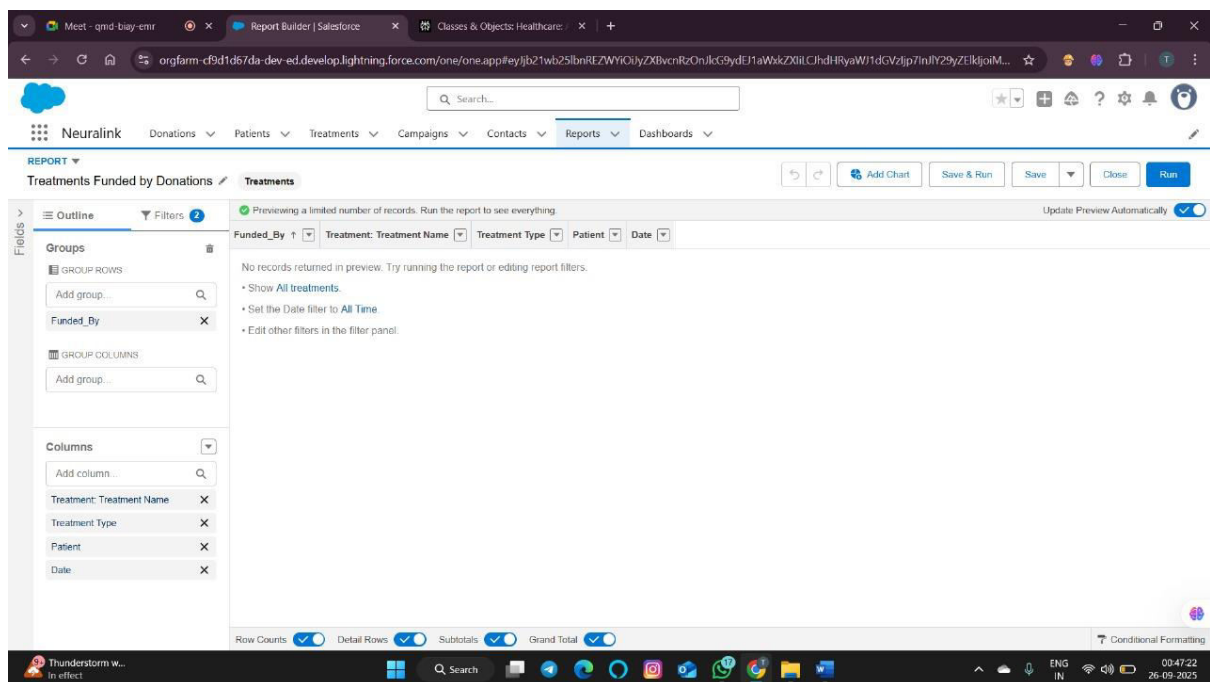


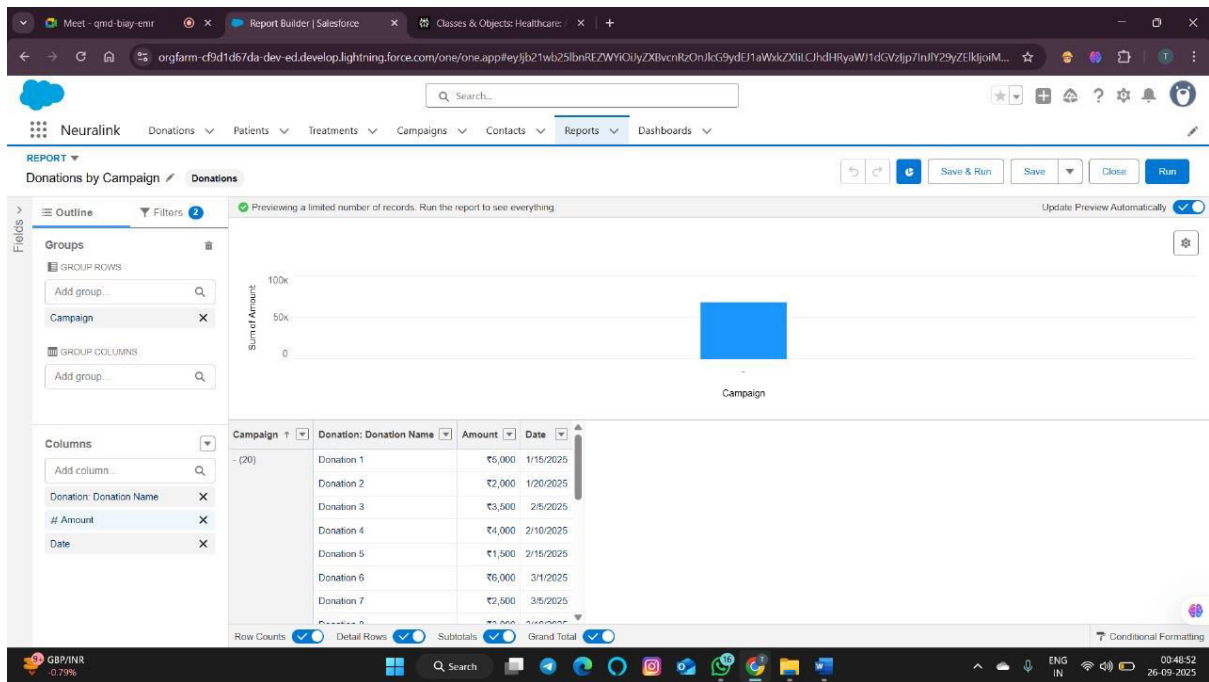
Phase 9: Reporting, Dashboards & Security Review

Reports (Tabular, Summary, Matrix, Joined):

Healthcare: Tabular lists patient visits, Summary groups by doctors, Matrix compares treatments across departments, Joined combines billing and appointments.

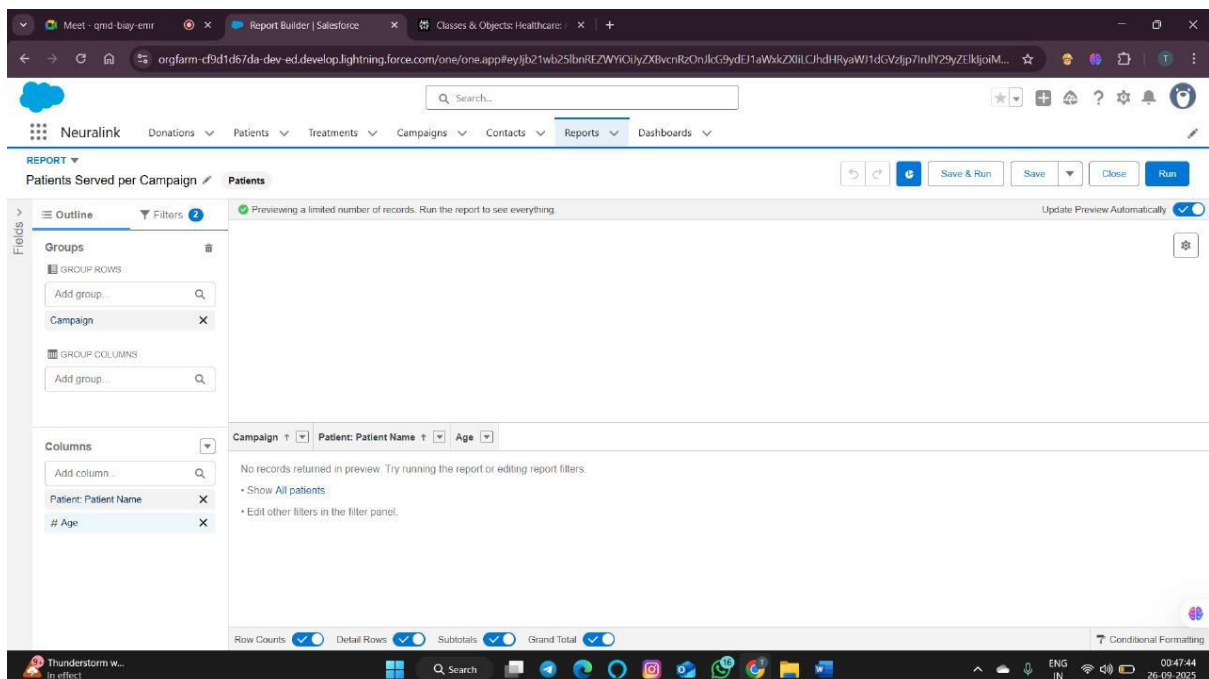
Donation: Tabular lists donor records, Summary groups by campaign, Matrix compares regional donations, Joined merges donor pledges and volunteer activity. Different report formats provide flexible analysis.





Report Types:

Healthcare: Custom report types combine patients with lab results or doctors.
Donation: Link donors, donations, and campaigns for holistic insights. Report types define available objects and fields, ensuring meaningful data relationships for analysis.



Meet - qmd-bay-emr x Recent | Reports | Salesforce x Classes & Objects: Healthcare: / x +

orgfarm-c9d1d57da-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mrn

Neuralink Donations Patients Treatments Campaigns Contacts Reports Dashboards

Reports

Recent 5 items

Search recent reports...

New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Treatments Funded by Donations		Health Reports	Tavishi Baranwal	9/25/2025, 6:29 AM	
Created by Me	Patients Served per Campaign		Health Reports	Tavishi Baranwal	9/25/2025, 6:25 AM	
Private Reports	Donation by Donor		Health Reports	Tavishi Baranwal	9/25/2025, 6:17 AM	
Public Reports	Donations by Campaign		Health Reports	Tavishi Baranwal	9/25/2025, 6:11 AM	
All Reports	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	7/21/2025, 4:09 AM	

FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

Thunderstorm w... In effect

00:48:09 26-09-2025

Meet - qmd-bay-emr x Report Builder | Salesforce x Classes & Objects: Healthcare: / x +

orgfarm-c9d1d57da-dev-ed.develop.lightning.force.com/one/one.app/fey/jjb21wb25lbnRlZm91dGZlZjlp7nUjY29yZElkjoIM...

Neuralink Donations Patients Treatments Campaigns Contacts Reports Dashboards

REPORT

Donation by Donor Donations

Save & Run Save Close Run

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Outline Filters

Groups

- GROUP ROWS
- Add group...
- Donor

GROUP COLUMNS

- Add group...

Columns

- Add column...
- Donation: Donation Name
- # Amount
- Date
- Campaign

Donor Donation: Donation Name Amount Date Campaign

No results found

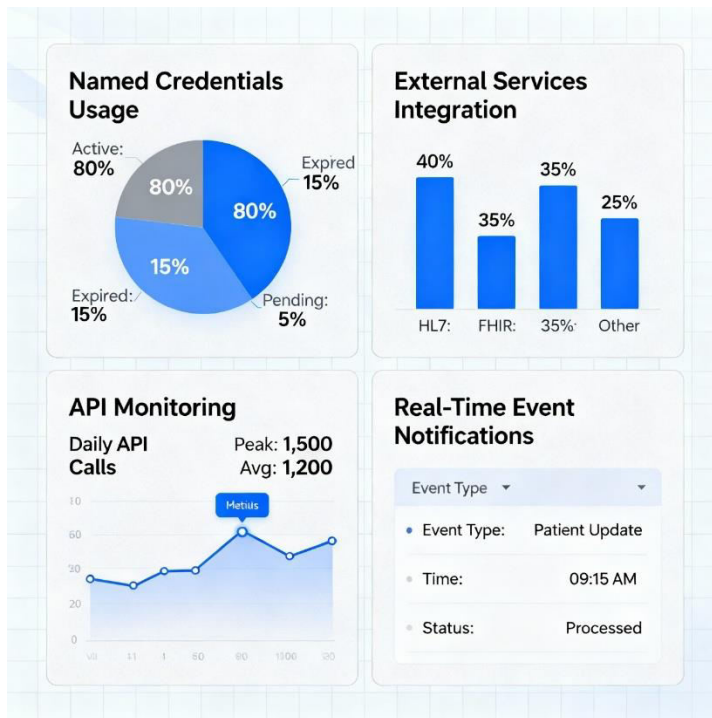
No records returned in preview. Try running the report or editing report filters.

- Set the Date filter to All Time
- Edit other filters in the filter panel.

Row Counts Detail Rows Subtotals Grand Total Conditional Formatting

Thunderstorm w... In effect

00:48:26 26-09-2025



Dashboards:

Healthcare: Display KPIs like admitted patients, treatment success rates, and appointment load.

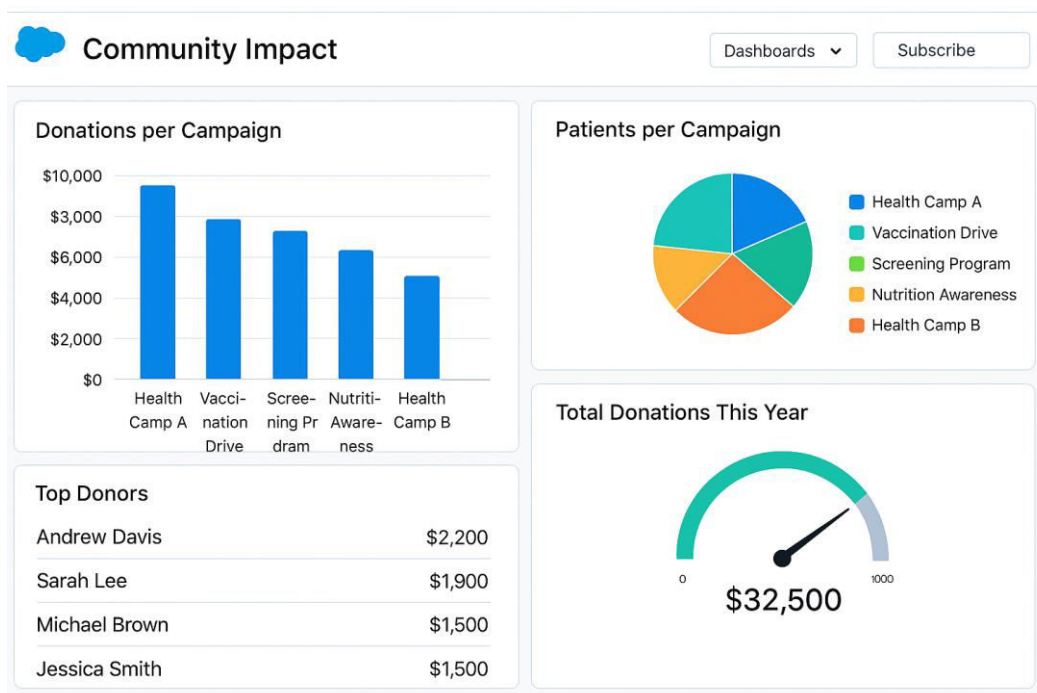
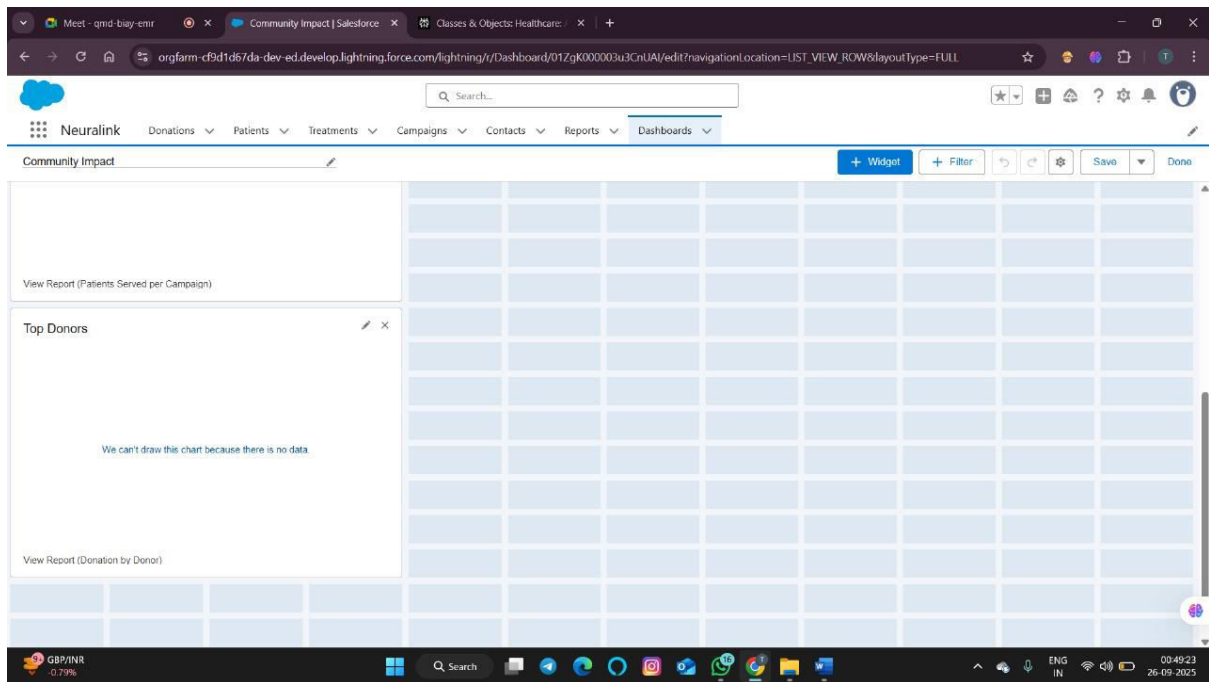
Donation: Show campaign progress, donor engagement, and fundraising goals.

Dashboards visualize key metrics for quick decision-making.

Dynamic Dashboards:

Healthcare: Doctors see only their patient data on dashboards.

Donation: Fundraisers view only campaigns they own. Dynamic dashboards personalize insights while maintaining data security, ideal for role-specific visibility.



Sharing Settings:

Healthcare: Make patient data private for compliance while sharing hospital-wide announcements.

Donation: Keep donor details restricted but share campaign performance broadly. Sharing settings balance collaboration with data confidentiality.

The donut chart is divided into 10 segments, each representing a category of Salesforce CPQ functionality. The segments are color-coded and labeled as follows:

- Security & Reports** (Red): Reports, Dashboards, FLS, Sharing, Login/IP
- Org Setup** (Pink): Editions, Profiles, Roles, OWD, Sharing Rules
- Data Modeling** (Blue): Objects, Fields, Record Types, Layouts, Relationships
- Automation** (Green): Validation Rules, Flows, Workflow Rules, Process Builder, Approvals
- Apex** (Orange): Classes, Triggers, SOQL/SOSL, Batch Apex, Future/Queueable
- Lightning** (Purple): App Builder, Record Pages, LWC, Events, Navigation
- Integration** (Pink): APIs, Callouts, Platform Events, CDC, Connect
- Data Management** (Light Green): Import Wizard, Data Loader, Duplicate Rules, Backup, Packages
- Reports Dashboards** (Red): Reports, Dashboards, FLS, Sharing, Login/IP
- Validation Rules** (Green): Validation Rules, Flows, Workflow Rules, Process Builder, Approvals

Healthcare: Restrict sensitive fields like medical history to authorized clinicians only.

Community Health & Donation Tracking Dashboard

Donations per Campaign

A bar chart with blue bars representing donation amounts for each campaign from 2020 to 2025. The y-axis ranges from 0 to 80 in increments of 20. The data shows a general downward trend with some fluctuations.

Year	Donations
2020	48
2021	75
2022	58
2023	45
2024	48
2025	35
2026	45
2027	38
2028	32
2029	35
2030	25
2031	22
2032	25
2033	22

Patients per Campaign

A pie chart with four segments of different shades of blue, representing the distribution of patients across four campaigns. The segments are approximately 35%, 25%, 20%, and 20% of the total.

Top Donors

Donor Name	Donation Amount	Campaign
Donor Name	\$260	\$50,000
Donor Name	14.3%	\$50,000
Donation Amount	19.6%	\$20,000
Campaign	15.5%	\$00,000

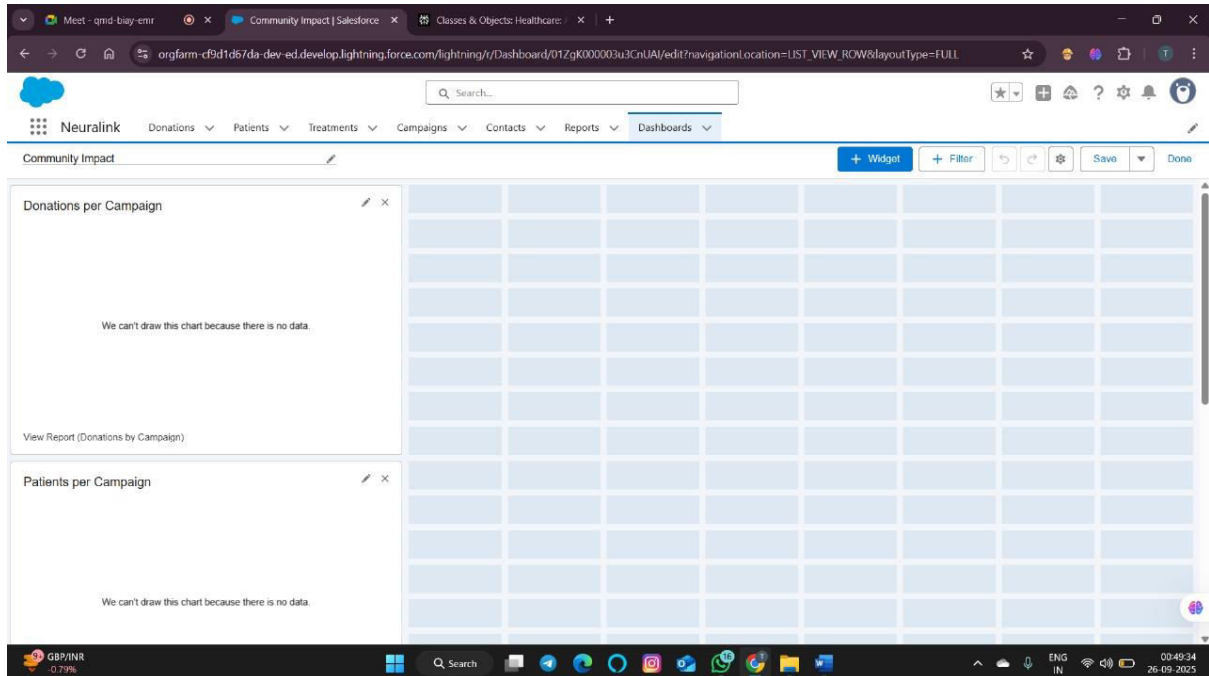
Total Donations This Year

A gauge chart with a blue needle pointing to the value \$500,000 on a scale from 0 to 1,000,000. The needle is positioned exactly halfway between 0 and 1,000,000.

Session Settings:

Healthcare: Shorter timeouts protect patient data on shared hospital devices.

Donation: Session policies prevent unauthorized donor record access during idle times. Session settings strengthen access security across both domains.



Login IP Ranges:

Healthcare: Allow access only from hospital or clinic networks.

Donation: Restrict fundraising staff logins to trusted office or VPN locations. IP ranges prevent unauthorized external access, enhancing system security.