

Phase 9 – Reporting, Dashboards & Security Review

1. Introduction

This phase makes Punjab Flood Relief CRM easy to **analyze and secure**.

- Reports/List Views → track Donations, Volunteers, Relief Requests.
- Dashboards (or List View tables) → show status at a glance.
- Security → make sure donors/volunteers see only their own data.

2. Reports via List Views (Quick Setup)

A. Donations Report (List View)

Purpose: Track donation types and amounts.

Steps:

1. Navigate → **App Launcher** → **Donations** → **List View Controls (gear)** → **Select Fields to Display**
2. Add columns:
 - a. Donation_Type__c
 - b. Donation_Amount__c
 - c. Donor__c
 - d. Status__c
3. Save.


	Donation Name ↑	Donation Amount	Donation Type	Donor	Relief Request	Status
1	Am	₹70,000.00	Money	Manoj Jarange	Need Money	Received
2	DN-0002	₹50,000.00	Money	Manoj Jarange		Received
3	DN-0002	₹50,000.00	Money	Manoj Jarange		Received
4	MJ's donation	₹1,000.00	Money	Manoj Jarange		Received

B. Volunteers Report (List View)

Purpose: Track available volunteers.

Steps:

1. App Launcher → **Volunteers** → **List View Controls** → **Select Fields to Display**
2. Add columns:
 - a. Name
 - b. Skillset__c
 - c. Availability__c
 - d. Location__c
3. Save.



ReliefConnect CRM

Donors
Donations
Volunteers
Relief Requests

Volunteers
All

New
Import
Change Owner
Printable View
Assign Label

3 items - Sorted by Volunteer Name - Updated a few seconds ago

<input type="checkbox"/>	Volunteer Name ↑	Availability	Skillset	Location
1	<input type="checkbox"/> Harpreet K	<input checked="" type="checkbox"/>	Ex-Defence	Amritsar
2	<input type="checkbox"/> Raj Patel	<input checked="" type="checkbox"/>	NDRF	Jalandhar
3	<input type="checkbox"/> Sharad Pawar	<input type="checkbox"/>	Politician	Baramati

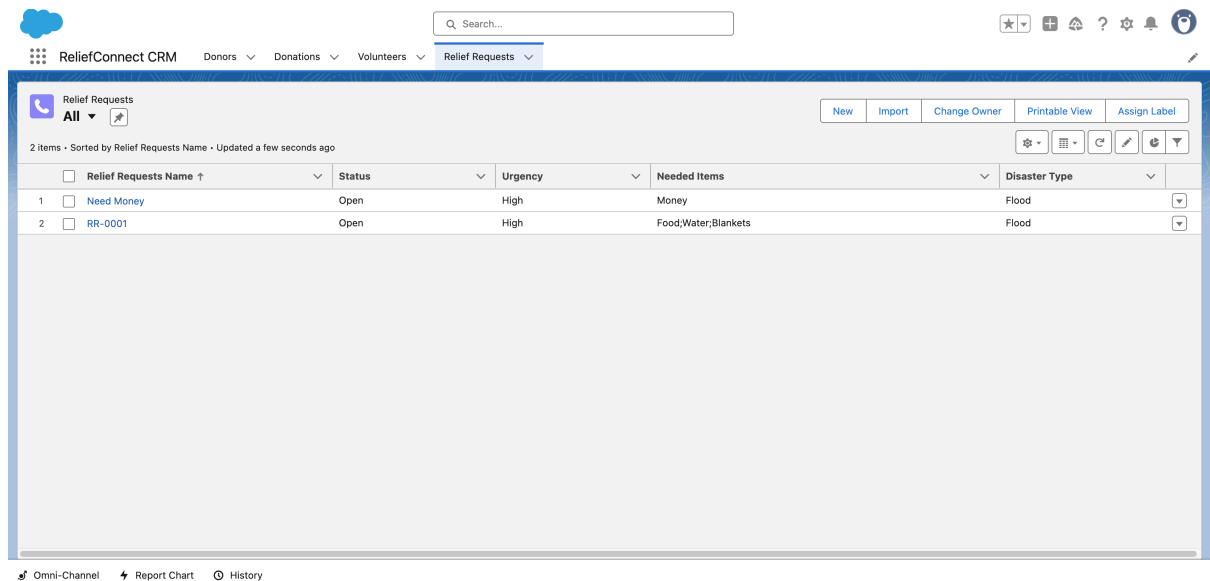
Omni-Channel
Report Chart
History

C. Relief Requests Report (List View)

Purpose: Track relief request status.

Steps:

- App Launcher → **Relief Requests** → **List View Controls** → **Select Fields to Display**
- Add columns:
 - Disaster_Type__c
 - Urgency__c
 - Needed_Items__c
 - Status__c
- Save.




3. Security Setup

Goal: Ensure privacy.

Steps:

1. Navigate: **Setup** → **Sharing Settings**
2. For each object (Donation, Volunteer, Relief Request):
 - a. Default Internal Access → **Private**
 - b. Save.



SETUP

Sharing Settings

Shipping Configuration Set
Streaming Channel
Tableau Host Mapping
User Presence
Walllist
Web Cart Document
Work Order
Work Plan
Work Plan Template
Work Step Template
Work Type
Work Type Group
Distribution
Donation
Donor
Mentor
Relief Request
Volunteer

Public Read Only

Public Read/Write

Public Read Only

Public Read Only

Private

Private

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Public Read/Write

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Other Settings

Standard Report Visibility ☒ ⓘ

Manual User Record Sharing ☐ ⓘ

Manager Groups ⓘ ⓘ

Secure guest user record access ⓘ ⓘ

Require permission to view record names in lookup fields ☐ ⓘ

Save

Cancel

4. Simple Dashboard Alternative (Optional)

Instead of charts (if Report Builder not working), use List Views as **live dashboards**:

- Open **Donations tab** → **Table view**
- Open **Volunteers tab** → **Table view**
- Open **Relief Requests tab** → **Table view**



Screenshot Path:

- Browser with 2–3 tabs open (each showing one table).

5. Conclusion

- Reports = Simple tables using List Views.
- Dashboards = Multiple tabs showing live data.
- Security = Donors see only their records, volunteers see only assigned work.