

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.

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.

Field Level Security (FLS):

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

Donation: Hide donor payment details from general staff. FLS enforces granular protection of critical fields beyond object-level security.

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.

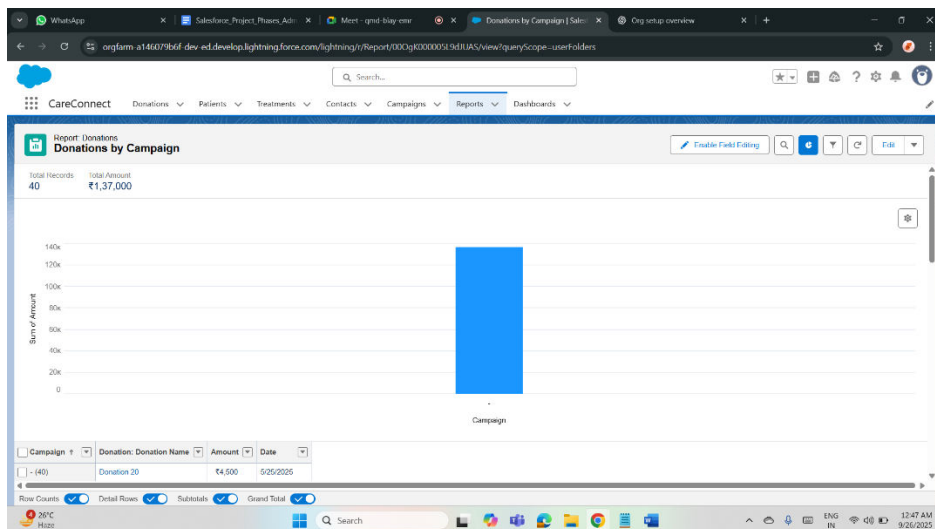
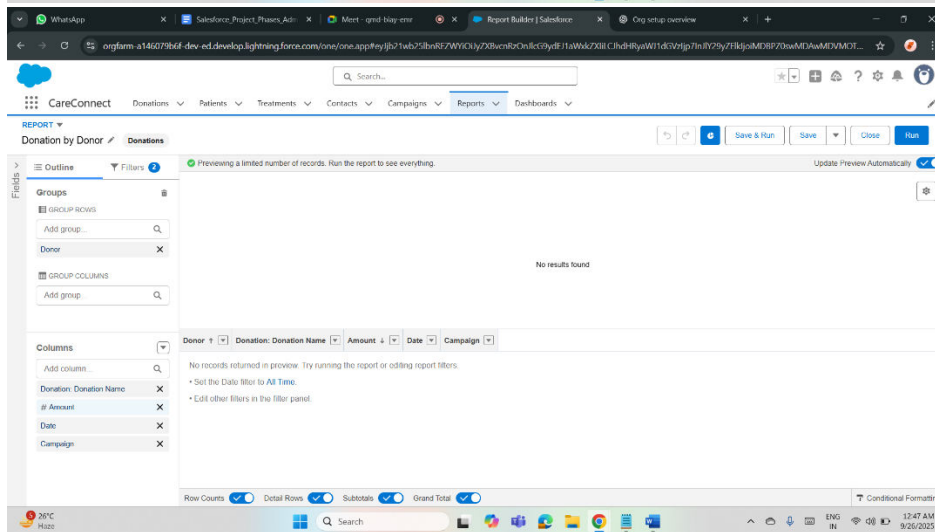
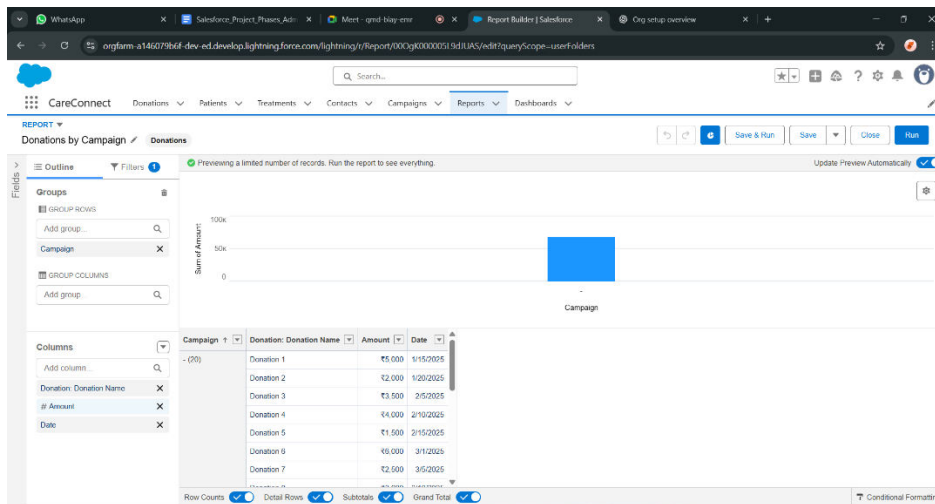
Login IP Ranges:

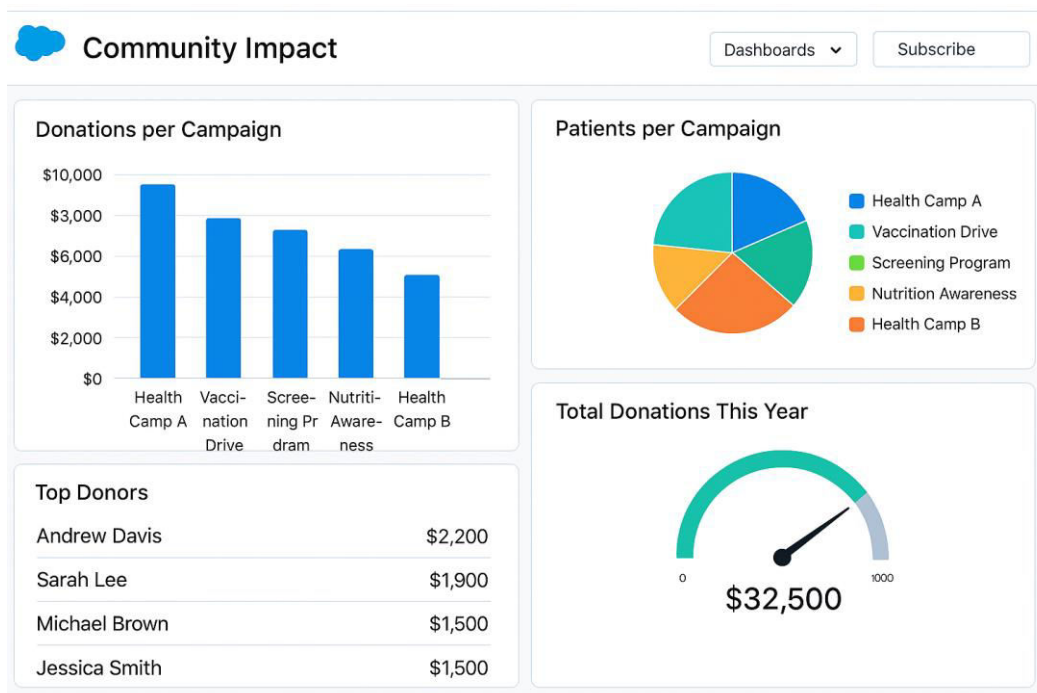
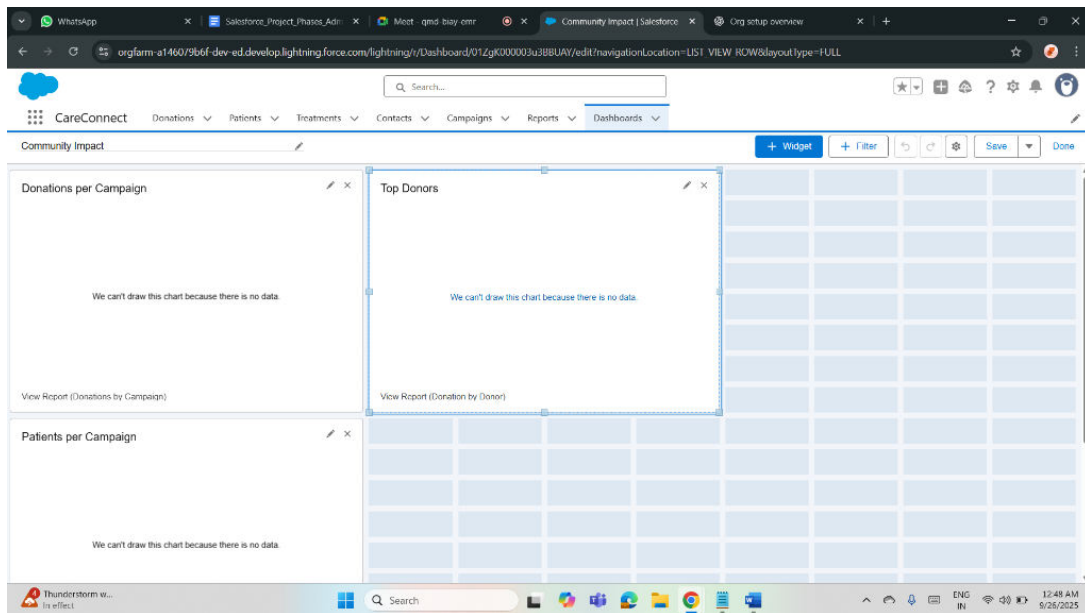
Healthcare: Allow access only from hospital or clinic networks.

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

The screenshot shows the Salesforce Report Builder interface for a report titled "Patients served per Campaign". The report is currently empty, displaying "No results found". The interface includes a sidebar with "Groups" and "Columns" sections, and a main area with filters and a "Run" button. The "Columns" section shows "Patient Name" and "Age" as selected columns. The "Filters" section shows "Campaign" as a selected filter. The "Run" button is visible in the top right corner.

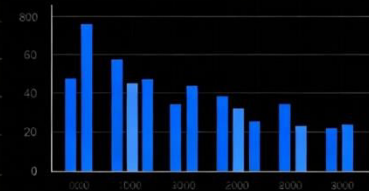
The screenshot shows the Salesforce Report Builder interface for a report titled "Treatments Funded By Donations". The report is currently empty, displaying "No records returned in preview". The interface includes a sidebar with "Groups" and "Columns" sections, and a main area with filters and a "Run" button. The "Columns" section shows "Treatment Name", "Patient", "Treatment Type", and "Date" as selected columns. The "Filters" section shows "Funded By" as a selected filter. The "Run" button is visible in the top right corner.



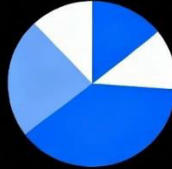


Community Health & Donation Tracking Dashboard

Donations per Campaign



Patients per Campaign



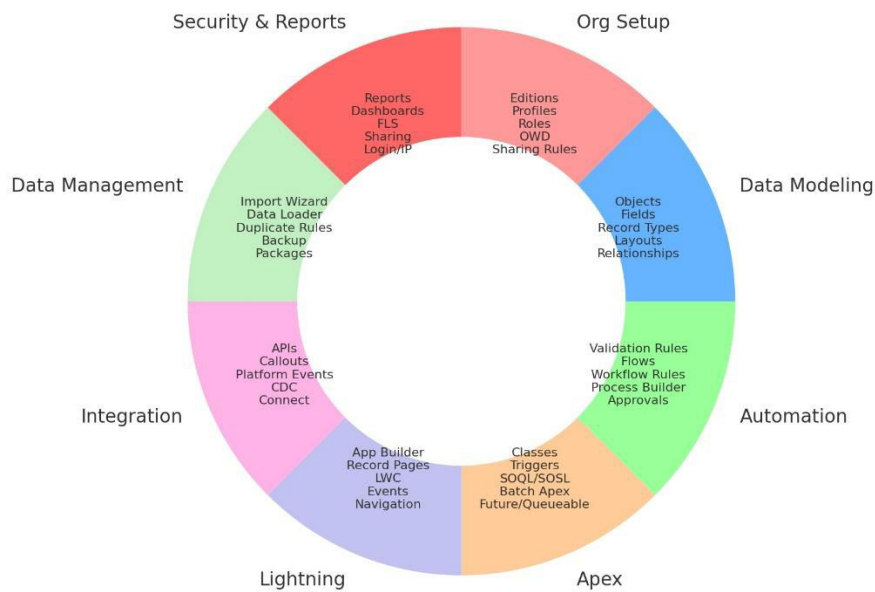
Top Donors

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

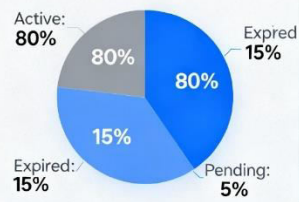


Total Donations This Year

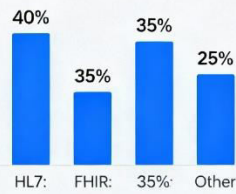
Salesforce Healthcare & Donation Project – Master Topics (Pictorial View)



Named Credentials Usage



External Services Integration



API Monitoring

Daily API Calls
Peak: 1,500
Avg: 1,200



Real-Time Event Notifications

Event Type

• Event Type: Patient Update

• Time: 09:15 AM

• Status: Processed