

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.

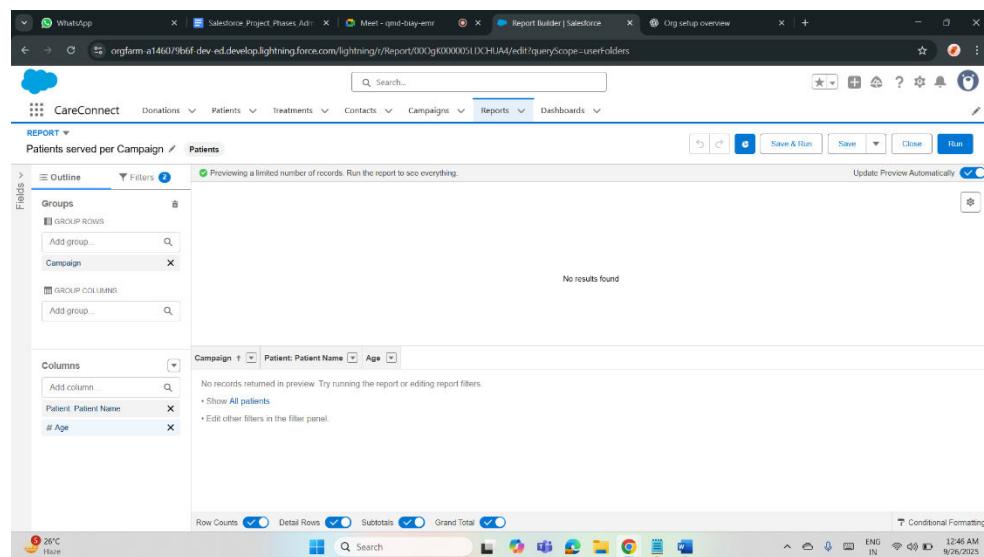
Donation: Hide donor payment details from general staff. FLS enforces granular protection of critical fields beyond object-level security.

Session Settings:

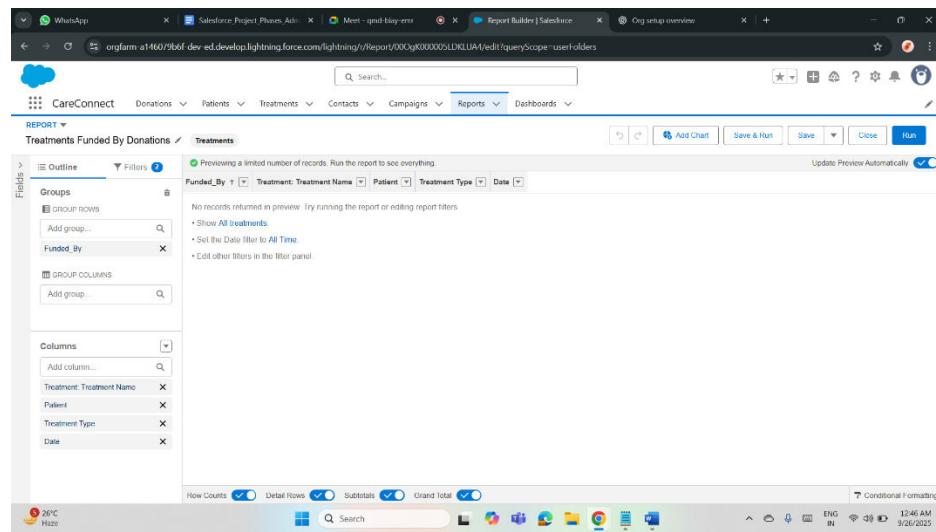
Healthcare: Shorter timeouts protect patient data on shared hospital devices.
Donation: Session policies prevent unauthorized donor record access during idle times. Session settings strengthen access security across both domains.

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.



This screenshot shows the Salesforce Report Builder interface. The report is titled "Patients served per Campaign". The left sidebar shows "Fields" with "Groups" and "Columns" sections. The main area displays a preview message: "No results found". Below the preview are filter options: "Campaign", "Patient: Patient Name", and "Age". At the bottom, there are buttons for "Row Counts", "Detail Rows", "Subtotals", and "Grand Total".



This screenshot shows the Salesforce Report Builder interface. The report is titled "Treatments Funded By Donations". The left sidebar shows "Fields" with "Groups" and "Columns" sections. The main area displays a preview message: "No records returned in preview. Try running the report or editing report filters." with instructions: "Show All treatments.", "Set the Date filter to All Time.", and "Edit other filters in the filter panel.". Below the preview are filter options: "Treatment", "Treatment Name", "Patient", "Treatment Type", and "Date". At the bottom, there are buttons for "Row Counts", "Detail Rows", "Subtotals", and "Grand Total".

REPORT - Donations by Campaign / Donations

Fields > Groups: Campaign; Columns: Donation: Donation Name, Amount, Date

Sum of Amount: 100k, 50k, 0

Campaign: (20)

Donation: Donation Name	Amount	Date
Donation 1	€5,000	1/15/2025
Donation 2	€2,000	1/20/2025
Donation 3	€3,500	1/25/2025
Donation 4	€4,000	2/10/2025
Donation 5	€1,500	2/15/2025
Donation 6	€6,000	3/1/2025
Donation 7	€2,000	3/5/2025

No results found.

Report - Donations by Campaign / Donations

Total Records: 40 Total Amount: €137,000

Sum of Amount: 140k, 120k, 100k, 80k, 60k, 40k, 20k, 0

Campaign: (40)

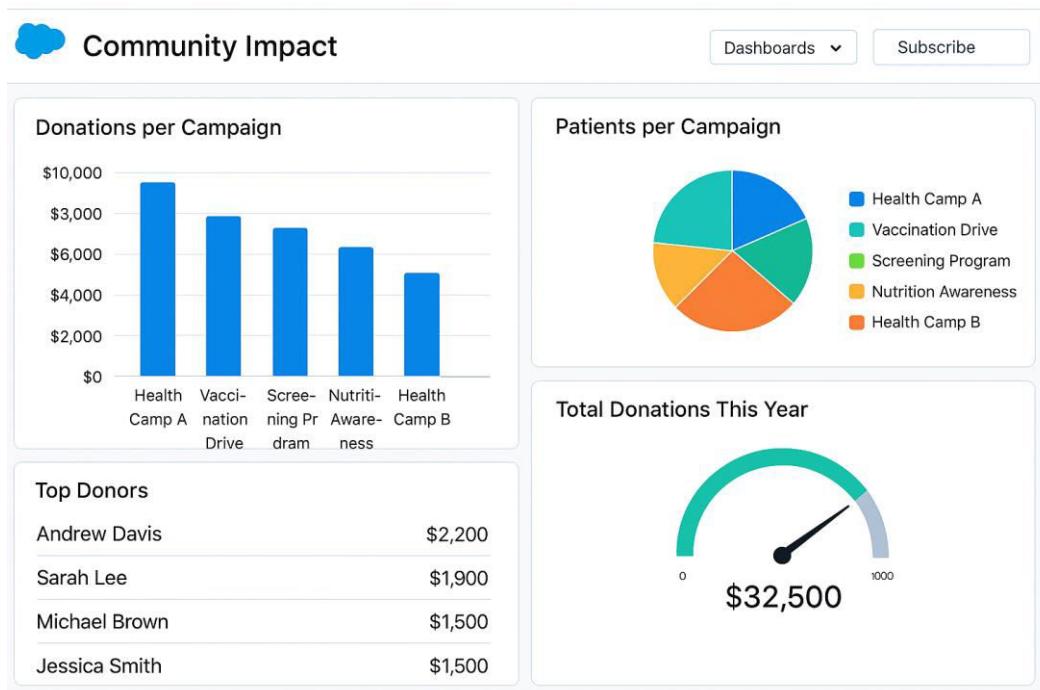
Campaign	Donation: Donation Name	Amount	Date
(40)	Donation 20	€4,500	5/25/2025

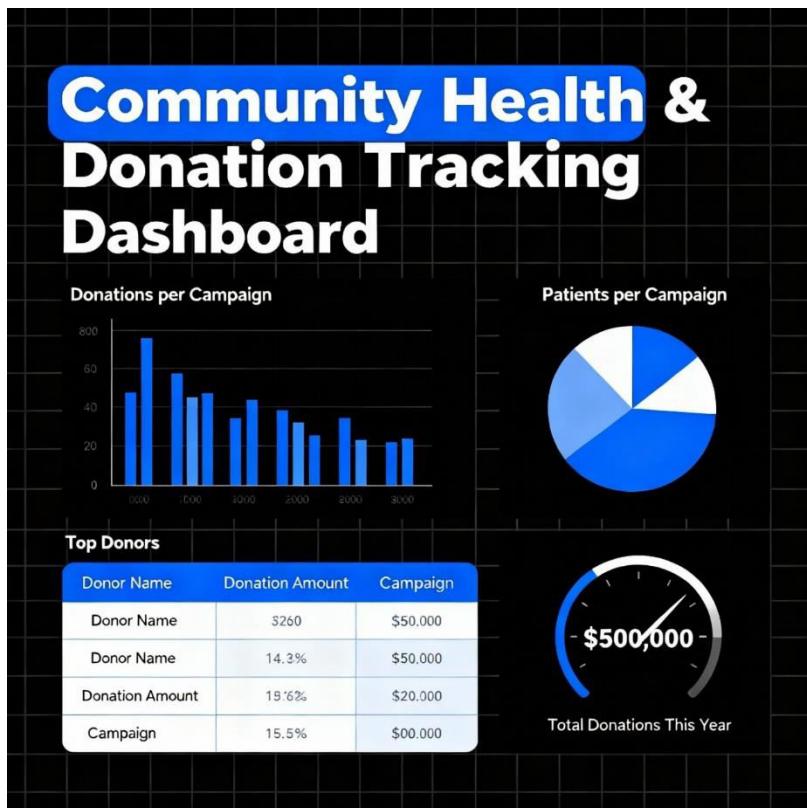
Screenshot of the Salesforce Lightning interface showing the 'Community Impact' dashboard.

The dashboard includes the following components:

- Donations per Campaign:** A chart placeholder showing "We can't draw this chart because there is no data."
- Top Donors:** A chart placeholder showing "We can't draw this chart because there is no data."
- Patients per Campaign:** A chart placeholder showing "We can't draw this chart because there is no data."

At the bottom, the status bar shows "Thunderstorm v... In effect" and the system time "12:48 AM 9/26/2025".





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

