

## Phase 9: Reporting, Dashboards & Security Review

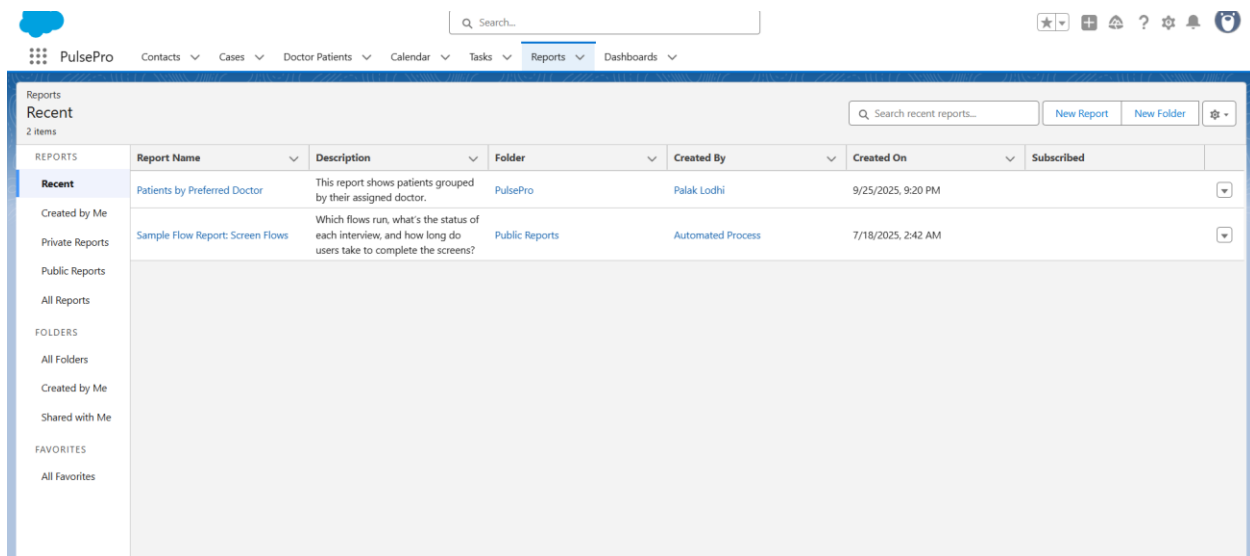
### Reports

Reports allow users to analyze and display Salesforce data in a structured manner. Salesforce provides four main types of reports: **Tabular, Summary, Matrix, and Joined**.

For this project, a **Summary Report** was created to show patients along with their associated cases. This report includes key fields such as *Patient Name*, *Patient ID*, *Age*, *Preferred Doctor*, and *Case Details*.

- **Steps:**


1. Navigate to the **Reports** tab → New Report.
2. Select **Contacts with Cases** report type.
3. Add columns: *Patient Name*, *Patient ID*, *Age*, *Preferred Doctor*, *Case Number*, *Treatment Notes*.
4. Group by **Preferred Doctor** to summarize patient distribution.
5. Save the report in the **PulsePro** folder.



The screenshot displays the Salesforce Reports interface. At the top, there is a navigation bar with the 'PulsePro' logo and several tabs: 'Contacts', 'Cases', 'Doctor Patients', 'Calendar', 'Tasks', 'Reports' (which is currently selected), and 'Dashboards'. A search bar is located to the right of the navigation bar. Below the navigation bar, the 'Reports' section is titled 'Recent' and shows '2 items'. A table lists the recent reports:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Patients by Preferred Doctor	This report shows patients grouped by their assigned doctor.	PulsePro	Palak Lodhi	9/25/2025, 9:20 PM	
Created by Me	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	7/18/2025, 2:42 AM	

On the left side of the interface, there is a sidebar with navigation options: 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', 'FAVORITES', and 'All Favorites'.



Search...

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PulsePro

Contacts

Cases

Doctor Patients

Calendar

Tasks

Reports

Dashboards

Report: Contacts with Cases

Patients by Preferred Doctor

This report shows patients grouped by their assigned doctor.

Enable Field Editing

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Add Chart

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Edit

Total Records

25

Total Age

0


	Full Name	Patient ID	Age	Gender	Preferred Doctor: Full Name
1	Rose Gonzalez	-	-	-	-
2	Sean Forbes	-	-	-	-
3	Jack Rogers	-	-	-	-
4	Pat Stummler	-	-	-	-
5	Andy Young	-	-	-	-
6	Tim Barr	-	-	-	-
7	John Bond	-	-	-	-
8	Stella Pavlova	-	-	-	-
9	Lauren Boyle	-	-	-	-
10	Babara Levy	-	-	-	-
11	Josh Davis	-	-	-	-
12	Jane Grey	-	-	-	-
13	Arthur Song	-	-	-	-
14	Ashley James	-	-	-	-
15	Tom Ripley	-	-	-	-

Recent Items

History

Report Types

Custom report types define which objects and fields are available in reports. For this project, the standard “Contacts with Cases” report type was sufficient. No custom report types were required.



Search Setup

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Setup

Home

Object Manager

report

Feature Settings

Analytics

Reports & Dashboards

Access Policies

Historical Trending

Report Types

Reporting Snapshots

Reports and Dashboards Settings

Security

Guest User Sharing Rule Access

Report

Didn't find what you're looking for?

Try using Global Search.

Contacts with Cases

Preview Layout

Edit Layout

Clone

Delete

Close

Below is the information for this custom report type. You can click the buttons on this to preview or update information for the custom report type

Details

Display Label

Contacts with Cases

API Name

Contacts\_with\_Cases

Description

List of contacts (patients) and their cases (treatments)

Created By

Palak Lodhi, 26/09/2025, 09:37 am

Store in Categ...

other

Deployment St...

Deployed

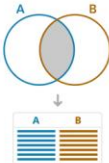
Modified By

Palak Lodhi, 26/09/2025, 09:37 am

Object Relationships

Contacts (A)

... with at least one related record from Cases (B)



Fields

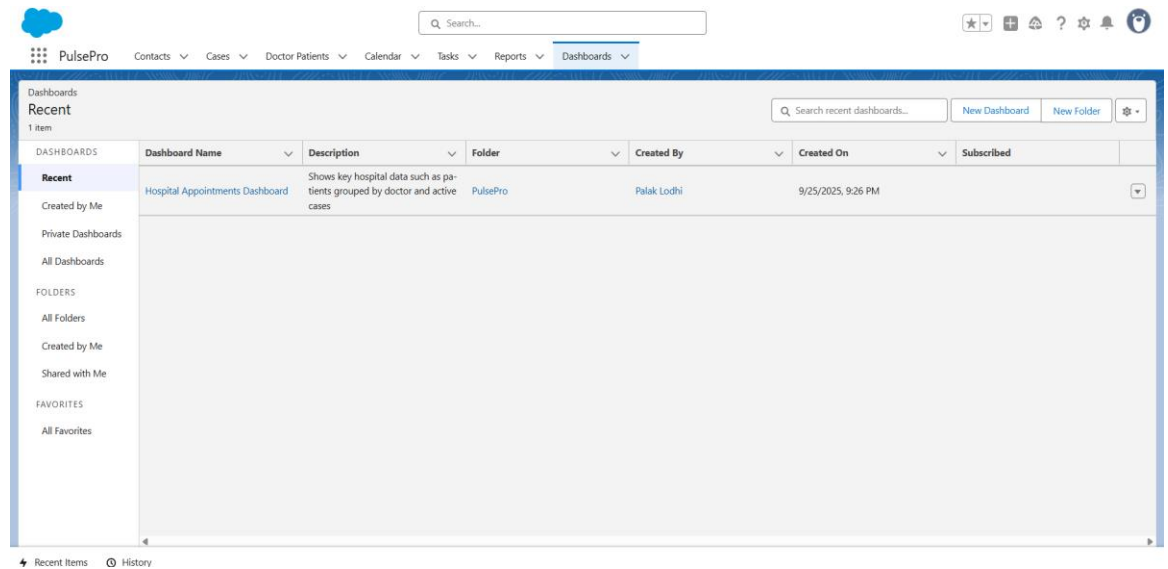
Source Object	Included Fields
Contacts	71

## Dashboards

Dashboards provide visual representation of report data. A **simple dashboard** was created to display patient distribution by preferred doctor.

- **Steps:**

1. Navigate to **Dashboards** → New Dashboard → Select **PulsePro** folder.
2. Add **Lightning Table widget** using the Summary Report created earlier.
3. Set **Title:** “Patients by Preferred Doctor”.
4. Save and run the dashboard.



PulsePro

Search...

Contacts Cases Doctor Patients Calendar Tasks Reports Dashboards

Dashboard

**Hospital Appointments Dashboard**

Shows key hospital data such as patients grouped by doctor and active cases

As of Sep 25, 2025, 9:38 PM Viewing as Palak Lodhi

Refresh Edit Subscribe

Patients by Preferred Doctor

Preferred Doctor: Full Name ↑	Record Count
-	25

View Report (Patients by Preferred Doctor) As of Sep 25, 2025, 9:38 PM

Recent Items History

## Dynamic Dashboards

Dynamic dashboards allow users to see data according to their access level. For this project, a **single standard dashboard** was sufficient, so dynamic dashboards were not implemented.

## Sharing Settings

Sharing settings control access to records across users and profiles. **Organization-wide defaults** were set to ensure:

- Doctors can view their own patients and cases.
- Managers can view all records.
- Receptionists can create and view patient appointments.

**Sharing Settings**

Manage sharing settings for: All Objects

[Disable External Sharing Model](#)

**Default Sharing Settings**

**Organization-Wide Defaults** [Edit](#) [Organization-Wide Defaults Help](#)

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>
Contact	Private	Private	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Public Read/Write	Private	<input checked="" type="checkbox"/>
Case	Private	Private	<input checked="" type="checkbox"/>
Campaign	Public Full Access	Private	<input checked="" type="checkbox"/>
Campaign Member	Controlled by Campaign	Controlled by Campaign	<input checked="" type="checkbox"/>
User	Public Read Only	Private	<input checked="" type="checkbox"/>
Activity	Private	Private	<input checked="" type="checkbox"/>
Calendar	Hide Details and Add Events	Hide Details and Add Events	<input checked="" type="checkbox"/>
Price Book	Use	Use	<input checked="" type="checkbox"/>
Product	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>
Individual	Public Read/Write	Private	<input checked="" type="checkbox"/>
Voice Call	Private	Private	<input checked="" type="checkbox"/>

## Field Level Security (FLS)

FLS restricts access to individual fields based on profiles. For this project:

- Sensitive fields like *Patient ID*, *Medical History* are visible only to Doctors and Managers.
- Other fields like *Name*, *Age*, *Contact Info* are visible to all relevant users.

**Field Level Security**

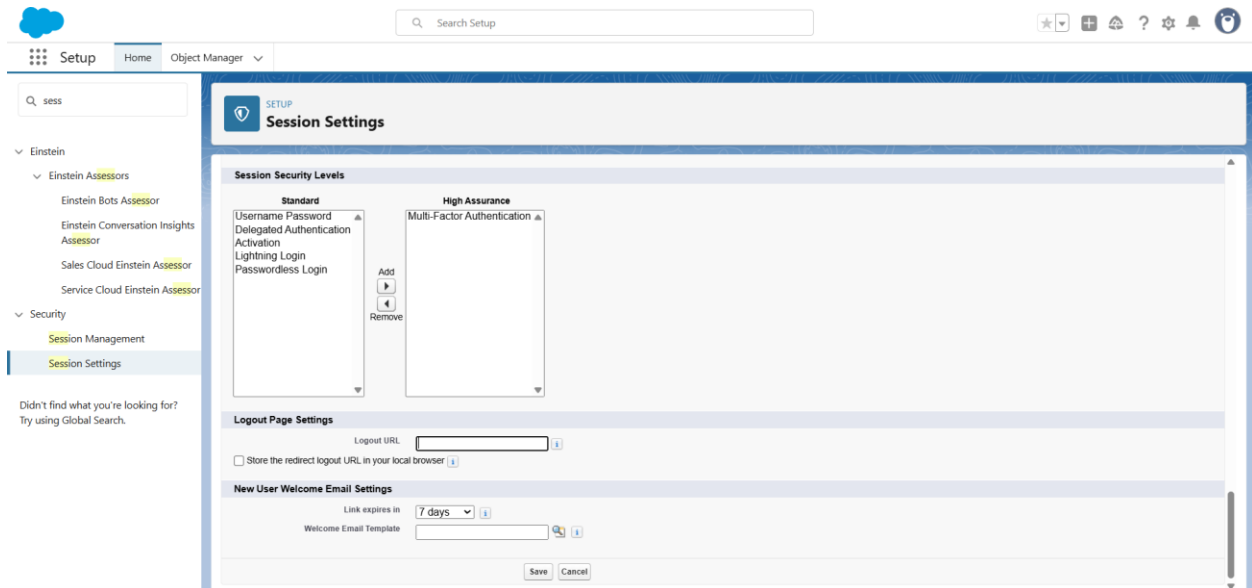
No matching items found

Didn't find what you're looking for? Try using Global Search.

Profile	Access	Access
Doctor Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Einstein Agent User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
External Apps Login User	<input type="checkbox"/>	<input type="checkbox"/>
External Identity User	<input type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input type="checkbox"/>
High Volume Customer Portal	<input type="checkbox"/>	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>	<input type="checkbox"/>
Identity User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Manager Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Minimum Access - API Only Integrations	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner Community Login User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community User	<input type="checkbox"/>	<input type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Receptionist Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Salesforce API Only System Integrations	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## Session Settings

Session settings determine session timeout and security policies. Default session settings were used for this project.



## Login IP Ranges

IP ranges restrict login to certain networks. For this project, no IP restrictions were configured to allow access from any location.

# Audit Trail

The **Setup Audit Trail** allows tracking changes made in Salesforce. It provides accountability and helps monitor administrative activities.

The screenshot displays the Salesforce Setup Audit Trail page. The left sidebar shows the Setup menu with 'Security' expanded and 'View Setup Audit Trail' selected. The main content area is titled 'View Setup Audit Trail' and includes a sub-header 'The last 20 entries for your organization are listed below. You can [download](#) your organization's setup audit trail for the last six months (Excel .csv file).' Below this is a table with the following columns: Date, User, Source Namespace Prefix, Action, Section, and Delegate User. The table lists 20 entries, all from the user 'pataik.lothi.aim22358@agentforce.com' on 9/25/2025. The actions include 'Requested an export', 'For duplicate rule Prevent\_Duplicate\_Patients, changed evaluation criteria.', 'For duplicate rule Prevent\_Duplicate\_Patients, changed matching rules.', 'Created new Contact duplicate rule "Prevent\_Duplicate\_Patients". Set "Record-Level Security" to "Enforce sharing rules"', and 'Changed Lightning Page: PulsePro UtilityBar'. The sections are 'Data Export', 'Duplicate Rule', and 'Lightning Pages'.

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/25/2025, 10:11:44 AM PDT	pataik.lothi.aim22358@agentforce.com		Requested an export	Data Export	
9/25/2025, 10:07:34 AM PDT	pataik.lothi.aim22358@agentforce.com		For duplicate rule Prevent_Duplicate_Patients, changed evaluation criteria.	Duplicate Rule	
9/25/2025, 10:07:34 AM PDT	pataik.lothi.aim22358@agentforce.com		For duplicate rule Prevent_Duplicate_Patients, changed matching rules.	Duplicate Rule	
9/25/2025, 10:07:34 AM PDT	pataik.lothi.aim22358@agentforce.com		Created new Contact duplicate rule "Prevent_Duplicate_Patients". Set "Record-Level Security" to "Enforce sharing rules"	Duplicate Rule	
9/25/2025, 9:04:12 AM PDT	pataik.lothi.aim22358@agentforce.com		Changed Lightning Page: PulsePro UtilityBar	Lightning Pages	
9/25/2025, 8:51:47 AM PDT	pataik.lothi.aim22358@agentforce.com		Changed Lightning Page: PulsePro Home Page	Lightning Pages	
9/25/2025, 8:51:35 AM PDT	pataik.lothi.aim22358@agentforce.com		Changed Lightning Page: PulsePro Home Page	Lightning Pages	
9/25/2025, 8:31:17 AM PDT	pataik.lothi.aim22358@agentforce.com		Changed Lightning Page: PulsePro Home Page	Lightning Pages	
9/25/2025, 8:29:40 AM PDT	pataik.lothi.aim22358@agentforce.com		Changed Lightning Page: PulsePro Home Page	Lightning Pages	
9/25/2025, 8:29:32 AM PDT	pataik.lothi.aim22358@agentforce.com		Changed Lightning Page: PulsePro Home Page	Lightning Pages	
9/25/2025, 8:25:36 AM PDT	pataik.lothi.aim22358@agentforce.com		Changed Lightning Page: PulsePro Home Page	Lightning Pages	
9/25/2025, 8:14:27 AM PDT	pataik.lothi.aim22358@agentforce.com		Changed Lightning Page: PulsePro Home Page	Lightning Pages	