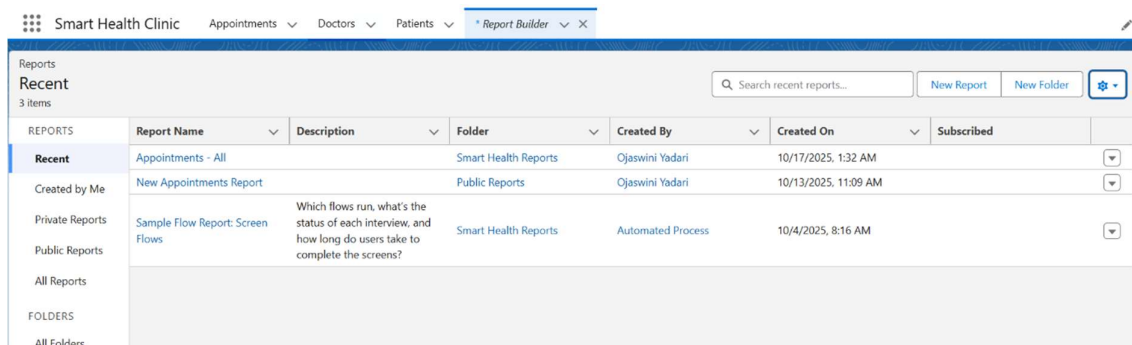


Phase 9: Reporting, Dashboards & Security Review

1. Reports (Tabular, Summary, Matrix, Joined)

Reports help analyze and visualize data in Salesforce. A Tabular report shows data in simple rows and columns (like a spreadsheet). A Summary report groups data (for example, appointments by doctor). A Matrix report allows grouping by both rows and columns for comparison. A Joined report combines multiple report types in one view. These reports are created using the “Reports” tab, where you can select the object, apply filters, and group fields as needed.

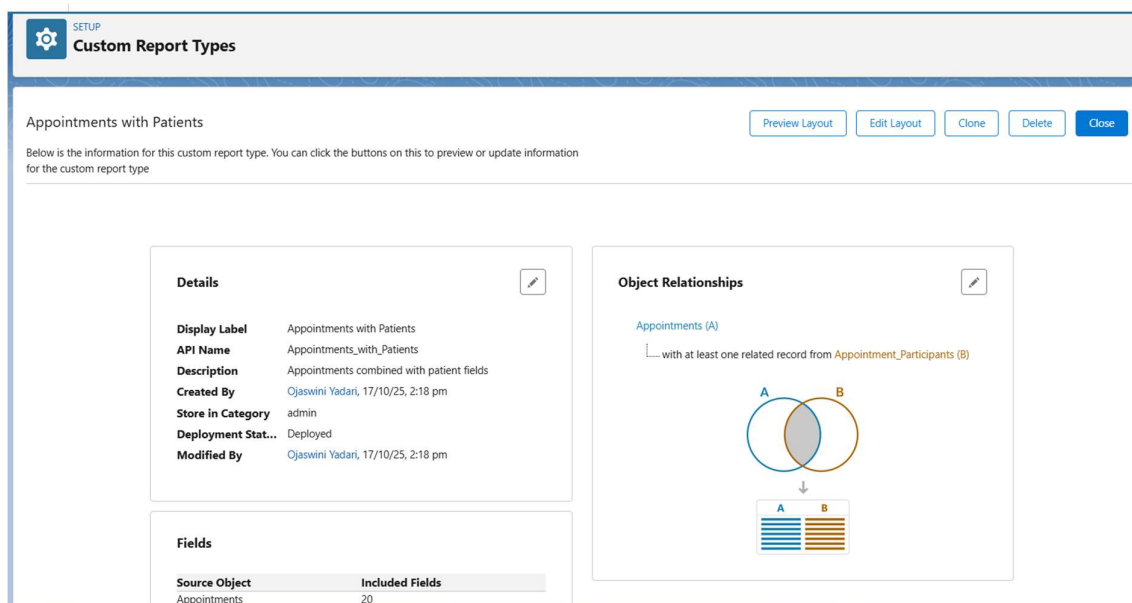


The screenshot shows the Salesforce Reports interface. At the top, there's a navigation bar with tabs for Smart Health Clinic, Appointments, Doctors, Patients, and Report Builder. Below this, a 'Reports' section shows 'Recent' reports. A table lists three reports:

| REPORTS | Report Name | Description | Folder | Created By | Created On | Subscribed |
|-----------------|----------------------------------|---|----------------------|-------------------|----------------------|------------|
| Recent | Appointments - All | | Smart Health Reports | Ojaswini Yadari | 10/17/2025, 1:32 AM | |
| Created by Me | New Appointments Report | | Public Reports | Ojaswini Yadari | 10/13/2025, 11:09 AM | |
| Private 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? | Smart Health Reports | Automated Process | 10/4/2025, 8:16 AM | |

2. Report Types

Report Types define which objects and fields are available in a report. You can create custom report types in **Setup → Report Types → New Custom Report Type**. For example, a report type “Appointments with Patients” can include both Appointment and Patient objects. Custom report types give flexibility to include relationships and custom fields that standard reports may not show.



The screenshot shows the 'Custom Report Types' setup page in Salesforce. The title is 'Appointments with Patients'. Below the title, there are buttons for 'Preview Layout', 'Edit Layout', 'Clone', 'Delete', and 'Close'. A note states: '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'.

The page is divided into two main sections: 'Details' and 'Object Relationships'.

Details

| Field | Value |
|--------------------|---|
| Display Label | Appointments with Patients |
| API Name | Appointments_with_Patients |
| Description | Appointments combined with patient fields |
| Created By | Ojaswini Yadari, 17/10/25, 2:18 pm |
| Store in Category | admin |
| Deployment Stat... | Deployed |
| Modified By | Ojaswini Yadari, 17/10/25, 2:18 pm |

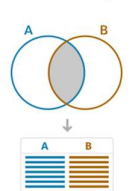
Fields

| Source Object | Included Fields |
|---------------|-----------------|
| Appointments | 20 |

Object Relationships

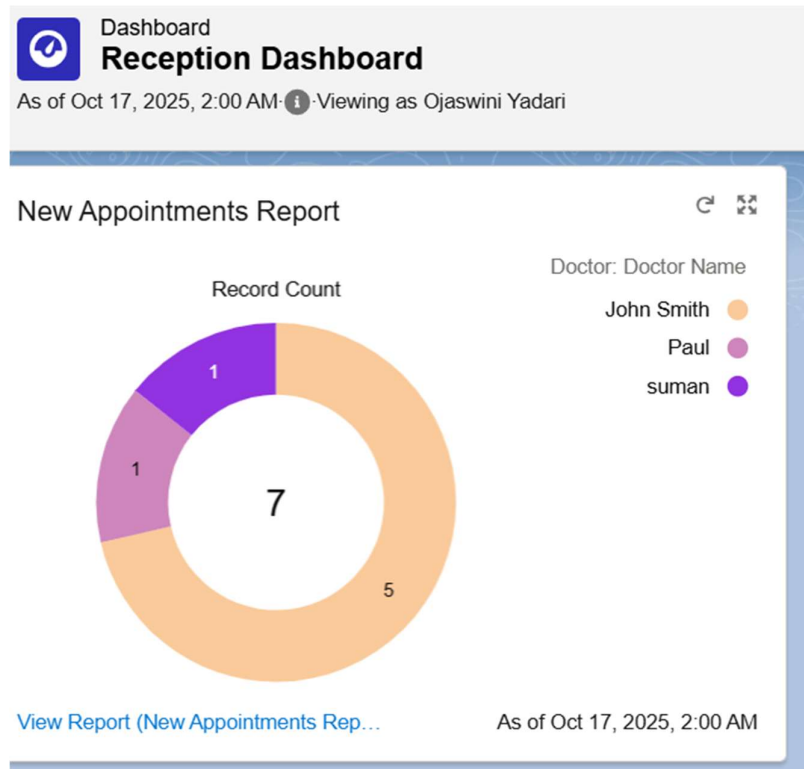
Appointments (A)

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



3.Dashboards

Dashboards display report data visually using charts, graphs, and gauges. You can create a new dashboard in **App Launcher** → **Dashboards** → **New Dashboard**, then add components that use existing reports. Dashboards make it easier to track metrics like daily appointments or active patients at a glance.



4.DynamicDashboards

Dynamic Dashboards allow each user to see data according to their own access level. This means a receptionist, doctor, or admin can all use the same dashboard but see only their own records. You can enable this by choosing “Run as Logged-in User” when creating or editing a dashboard. It improves security and personalization of reports.

5.SharingSettings

Sharing settings control the visibility of records for users. In **Setup** → **Sharing Settings**, you can define the **Organization-Wide Defaults (OWD)** for each object, such as Public Read/Write or Private. You can also create **Sharing Rules** to open up access for certain roles or groups. Proper sharing ensures sensitive data is visible only to authorized users.

| SETUP Sharing Settings | | | |
|----------------------------|----------------------|----------------------|---|
| Shipment | Private | Private | ✓ |
| Shipping Carrier | Public Read Only | Private | ✓ |
| Shipping Carrier Method | Public Read Only | Private | ✓ |
| Shipping Configuration Set | Public Read Only | Private | ✓ |
| Streaming Channel | Public Read/Write | Private | ✓ |
| Tableau Host Mapping | Public Read Only | Private | ✓ |
| User Presence | Public Read Only | Private | ✓ |
| User Provisioning Request | Private | Private | ✓ |
| Waitlist | Private | Private | ✓ |
| Web Cart Document | Private | Private | ✓ |
| Work Order | Private | Private | ✓ |
| Work Plan | Private | Private | ✓ |
| Work Plan Template | Private | Private | ✓ |
| Work Step Template | Private | Private | ✓ |
| Work Type | Private | Private | ✓ |
| Work Type Group | Public Read/Write | Private | ✓ |
| Appointment | Controlled by Parent | Controlled by Parent | |
| Appointment_Participant | Controlled by Parent | Controlled by Parent | |
| Doctor | Public Read Only | Public Read Only | ✓ |
| Patient | Private | Private | ✓ |

Other Settings
[Other Settings Help ?](#)

Manager Groups ☐ 1
Secure guest user record access ☒ 1

6.FieldLevelSecurity(FLS)

Field Level Security controls access to individual fields in an object. In **Setup → Object Manager → [Object Name] → Fields & Relationships**, you can edit field visibility by profile or permission set. This ensures users see only the fields they need— for example, hiding a patient’s confidential notes from non-medical staff.

| Field Sets | | | | |
|--------------------------------|-----------------|--------------------------------------|--------------------------------------|---|
| 2 Items. Sorted by Field Label | | | | |
| | | | | <input type="text" value="Quick Find"/> New |
| FIELD LABEL | API NAME | CREATED BY | MODIFIED BY | DESCRIPTION |
| ContactNumber__c | ContactNumber_c | Ojaswini Yadari, 10/17/2025, 2:09 AM | Ojaswini Yadari, 10/17/2025, 2:10 AM | check visible for profiles that should see it (Doctor, Receptionist) and uncheck for others |
| MedicalNotes | MedicalNotes_c | Ojaswini Yadari, 10/17/2025, 2:11 AM | Ojaswini Yadari, 10/17/2025, 2:11 AM | only visible by doctor |

7.SessionSettings

Session settings manage how long a user can stay logged in and add extra protection to login sessions. In **Setup → Session Settings**, you can set session timeout duration, enable IP locking, and force re-login after session timeout. This prevents unauthorized access if a user leaves a system unattended.

8.LoginIPRanges

Login IP Ranges help secure logins to Salesforce from trusted network locations. Go to **Setup → Profiles → [Profile Name] → Login IP Ranges** and define allowed IP address ranges. Users logging in from outside these ranges will be blocked, reducing the risk of unauthorized access.

