Phase 9: Reporting Dashboard & Security review

◆ Report Type

Decide which *custom report types* you need beyond standard types (e.g., Farmer with visit or Deal).

Steps: Setup → Report Types → New Custom Report Type

Primary Object: Farmer

Related Object: as per requirement crop/deal/visit (select "Each 'Farmer' may or may not have related records")

Save & Deploy

Why: custom report types let you show object combinations not available in standard report types.

◆ Reports

Reports helps to track effectively in the AgriConnect

A. Create Reports

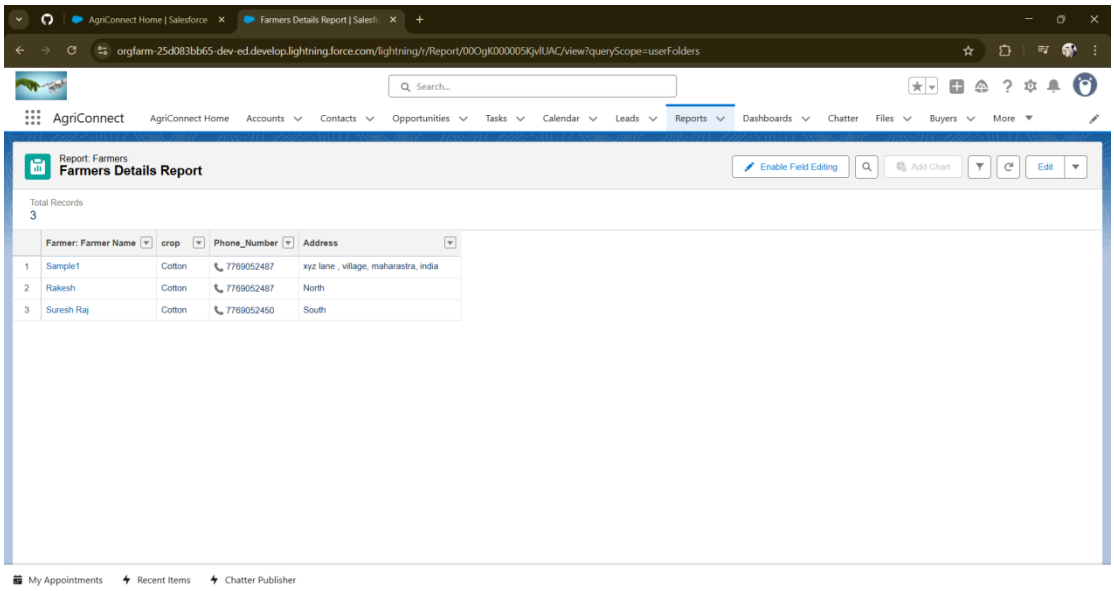
1. Go to **App Launcher → Reports → New Report**.

2. Select the report type: e.g., **Products** or **Orders**.

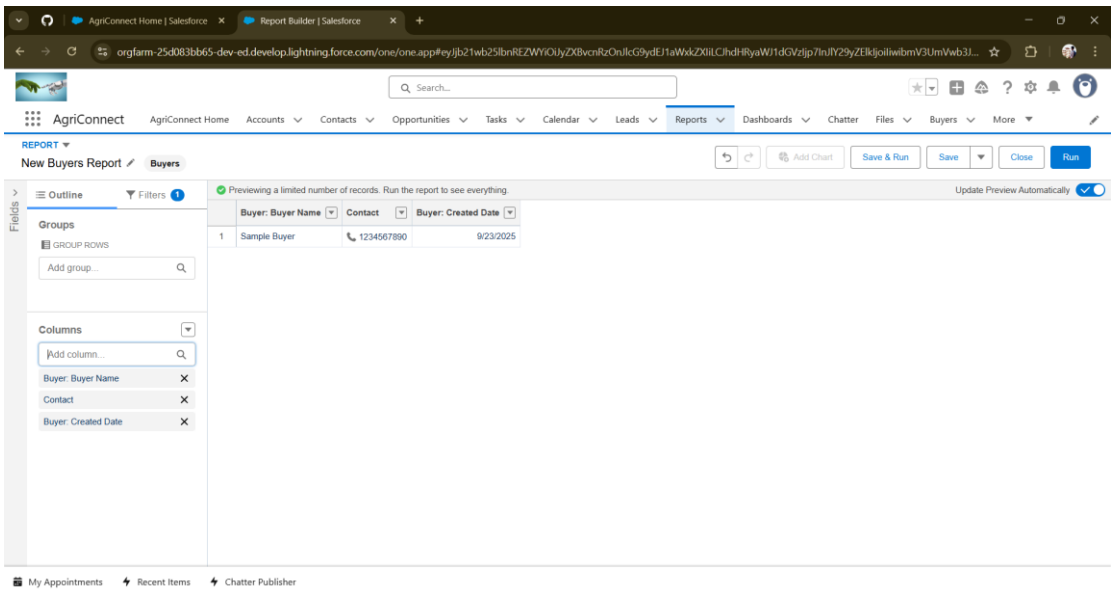
3. Add fields:

- For Farmer Detail Report:
  - ✧ Farmer name
  - ✧ crop

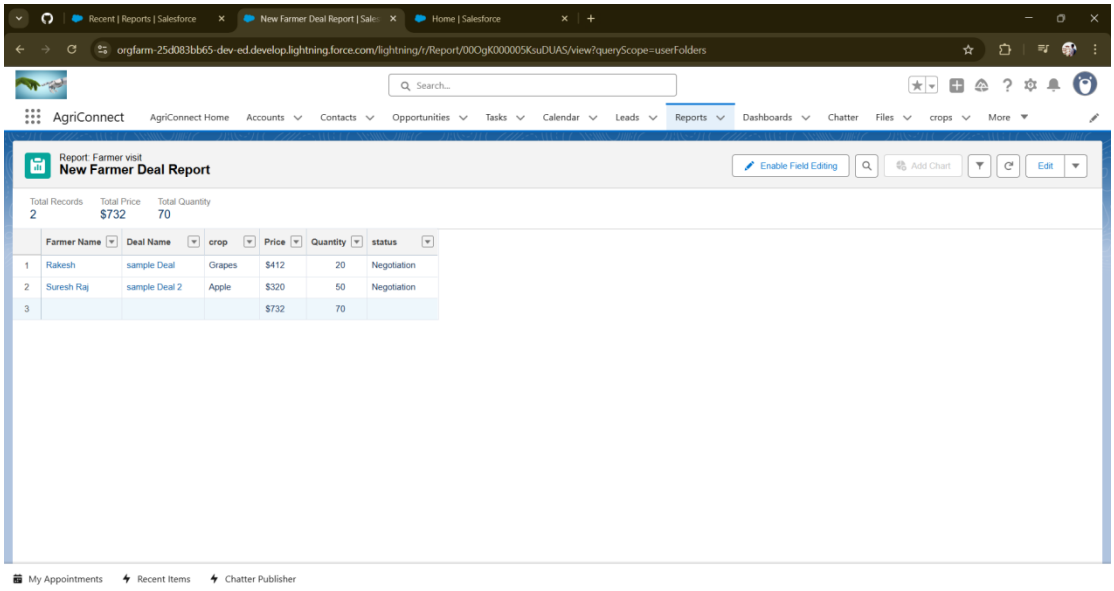
- ✧ Phone_Number
- ✧ Address



- For New Buyer Report:
  - ✧ Buyer Name
  - ✧ Contact
  - ✧ Created Date



- For New Farmer Deal Report :
    - ✧ Farmer Name
    - ✧ Deal Name
    - ✧ Crop
    - ✧ Price
    - ✧ Quantity
    - ✧ status



◆ Dashboard

Dashboards provide the visual insights.

A. Create Dashboard

1. Go to App Launcher → Dashboards → New Dashboard.

2. Enter dashboard name, e.g. AgriConnect Dashboard.

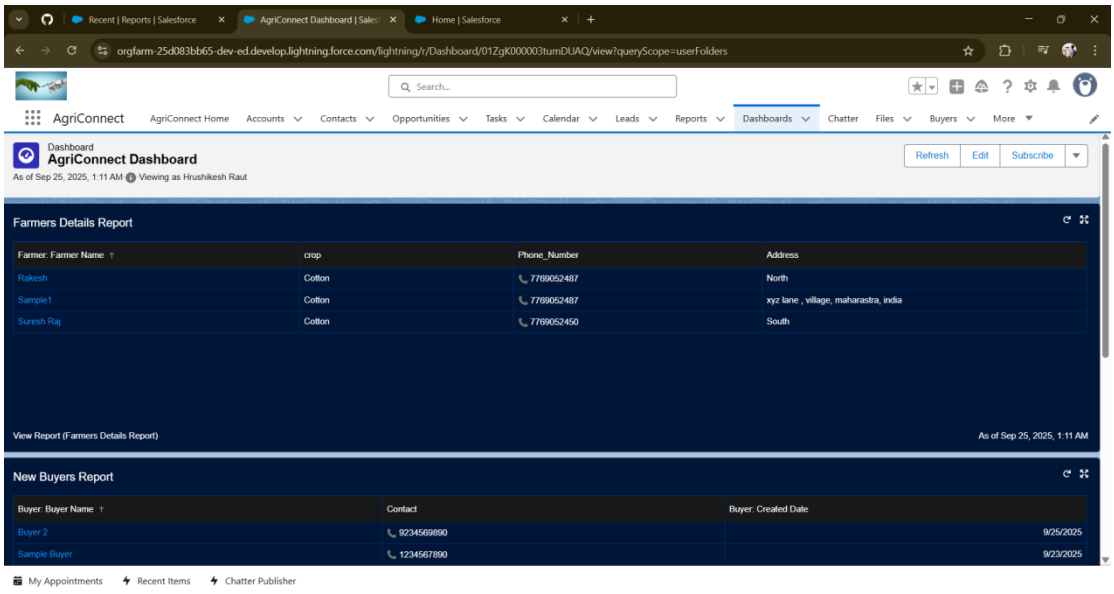
3. Add components using your reports as data sources (charts, tables, graphs).

4. Configure components to show key metrics:

- Farmer Details
- Buyer Details
- New Farmer Deals

5. Arrange components for clear visualization.

6. Save the dashboard



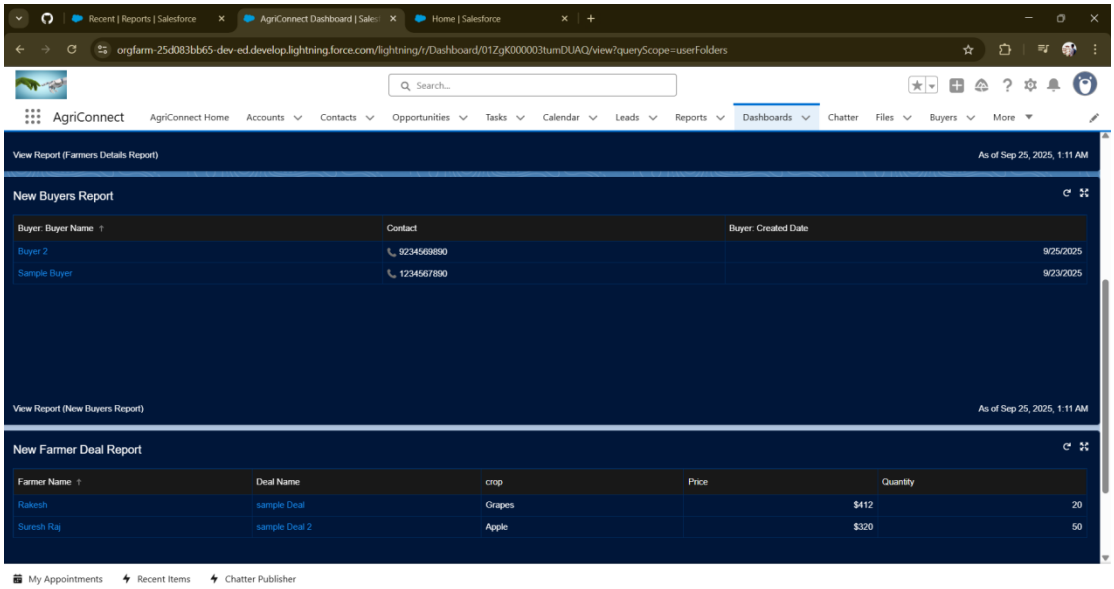
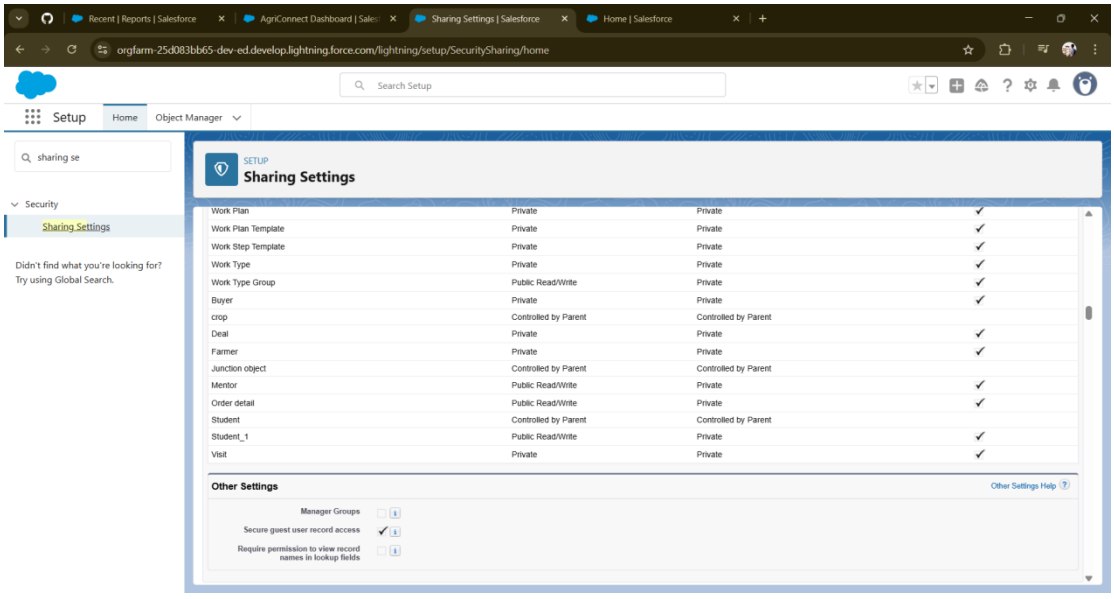
B. Dashboard Benefits

• Easy visualization about new records.

• Helps identify records and issues quickly.

• Supports faster decision-making for officer.

• Enhances Monitoring, eg. Officer can keep an eye.



• Security is very essential, specially a persons data. Sharing Settings provide the feature about data sharing like who can see, what can see etc. E.g For a Farmer it is private