

# 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

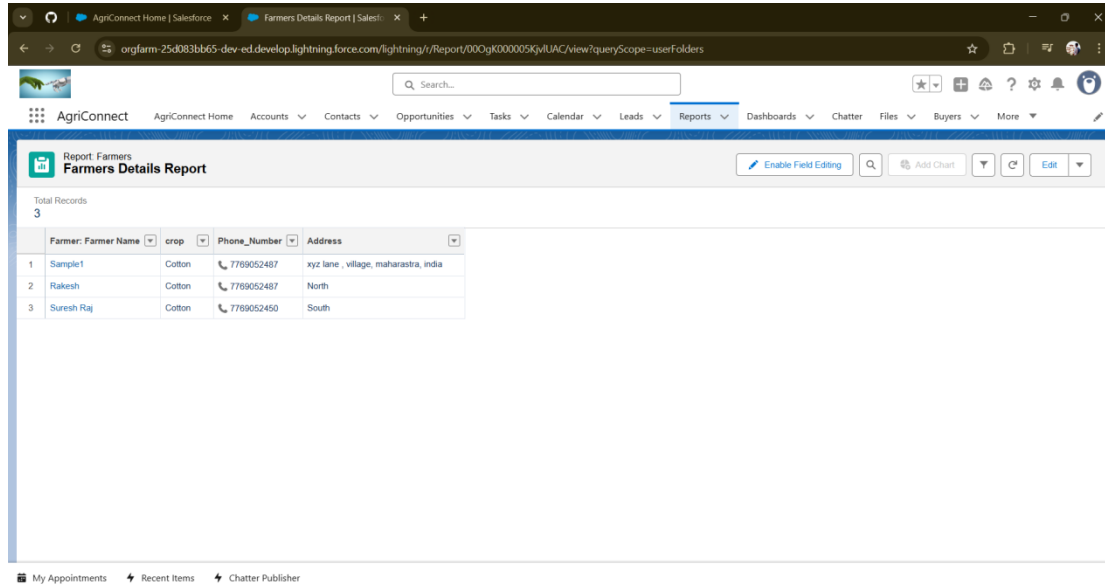
Reports helps to track effectively in the AgriConnect

### 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



The screenshot shows the 'Report Farmers' interface in Salesforce. The report is titled 'Farmers Details Report' and shows 3 total records. The table has columns for Farmer Name, crop, Phone\_Number, and Address. The data is as follows:

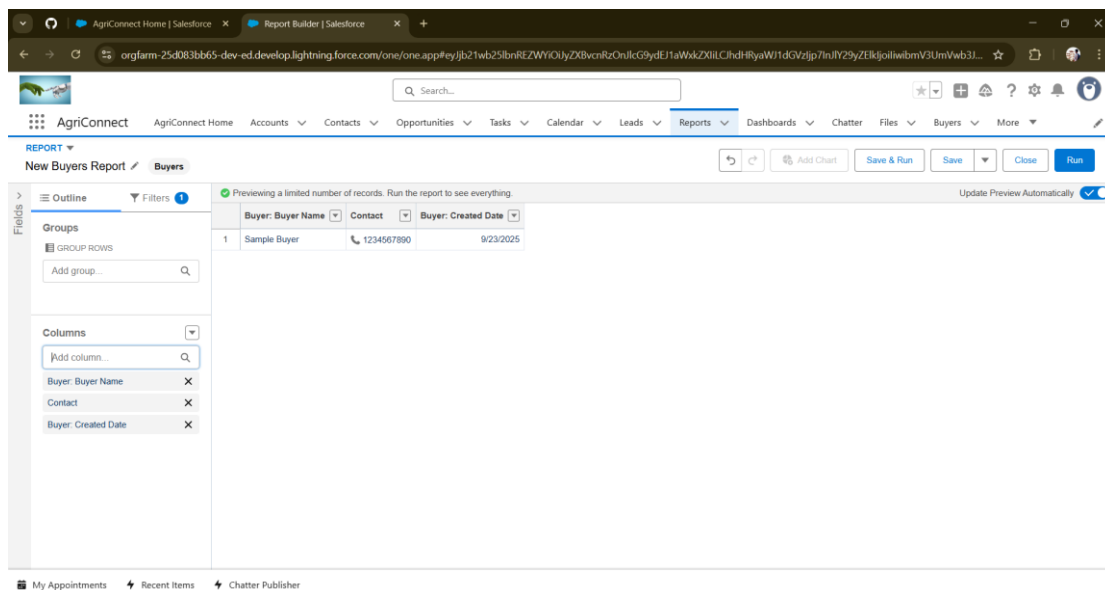
	Farmer: Farmer Name	crop	Phone_Number	Address
1	Sample1	Cotton	7789052487	xyz lane , village, maharashtra, india
2	Rakesh	Cotton	7789052487	North
3	Suresh Raj	Cotton	7789052450	South

○ For New Buyer Report:

✧ Buyer Name

✧ Contact

✧ Created Date



The screenshot shows the 'Report Builder' interface in Salesforce for a 'New Buyers Report'. The report is currently in preview mode, showing 1 record. The table has columns for Buyer Name, Contact, and Buyer Created Date. The data is as follows:

	Buyer: Buyer Name	Contact	Buyer: Created Date
1	Sample Buyer	1234567890	9/23/2025

- For New Farmer Deal Report :

- ✧ Farmer Name

- ✧ Deal Name

- ✧ Crop

- ✧ Price

- ✧ Quantity

- ✧ status

Report: Farmer visit  
**New Farmer Deal Report**

Enable Field Editing

Total Records: 2    Total Price: \$732    Total Quantity: 70

	Farmer Name	Deal Name	crop	Price	Quantity	status
1	Rakesh	sample Deal	Grapes	\$412	20	Negotiation
2	Suresh Raj	sample Deal 2	Apple	\$320	50	Negotiation
3				\$732	70	

## ◆ 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

The screenshot shows the AgriConnect Dashboard in a Salesforce environment. The dashboard is titled 'AgriConnect Dashboard' and is viewed as 'Hrushikesh Raut' as of 'Sep 25, 2025, 1:11 AM'. The dashboard contains two reports:

**Farmers Details Report**

Farmer: Farmer Name	Crop	Phone Number	Address
Rakesh	Cotton	7789052487	North
Sample 1	Cotton	7789052487	xyz lane , village, maharashtra, india
Suresh Raj	Cotton	7789052450	South

**New Buyers Report**

Buyer: Buyer Name	Contact	Buyer: Created Date
Buyer 2	9234569890	9/25/2025
Sample Buyer	1234567890	9/23/2025

### 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.

