

# Phase 9: Reports & Dashboards

## 1. Objective

The goal of this phase is to create customized reports and dashboards that provide actionable insights into Farmers Market operations. These insights help stakeholders (Farmers, Buyers, and Admins) track sales, orders, deliveries, and performance trends effectively.

## 2. Key Features in this Phase

### 1. Reports

- Standard Reports (e.g., Accounts, Contacts, Opportunities).
- Custom Reports specific to Farmers Market:
  - Farmer-wise Orders Report.
  - Produce-wise Sales Report.
  - Buyer Purchase History Report.
  - Freight Cost Analysis Report.
  - Order Status Tracking Report.

### 2. Dashboards

- Visual summary of key metrics.
- Multiple components (charts, tables, gauges).
- Dynamic filters for real-time analysis.

## 3. Steps for Creating Reports

### A. Create a Custom Report Type

1. Go to **Setup → Report Types → New Custom Report Type**.
2. Select the **Primary Object** (e.g., Orders).

3. Define related objects (e.g., Farmer, Buyer, Produce).
4. Deploy the report type.

## B. Build Reports

1. Navigate to **Reports → New Report**.
2. Choose the report type (e.g., Orders with Farmer).
3. Apply **Filters** (date, status, quantity, etc.).
4. Group data by:
  - Farmer Name
  - Buyer Name
  - Produce
  - Order Date
5. Add **Summaries** (SUM, COUNT, AVG).
6. Save the report in **Farmers Market Report Folder**.

## C. Example Reports

- **Farmer Sales Report** – Shows total sales by each farmer.
- **Produce Demand Report** – Lists produce types with highest order quantities.
- **Order Status Report** – Displays pending, completed, and cancelled orders.
- **Revenue Report** – Calculates total revenue from orders.

Report: Farmers

Farmers Report

Enable Field Editing

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Region	Farmer: Farmer Name	Market	Phone	Email	Farmer: Owner Name
North (10)	Farmer 44	-	(934) 738-4499	farmer44@example.com	Thrishamahi Bandari
	Farmer 43	-	(935) 666-1309	farmer43@example.com	Thrishamahi Bandari
	Farmer 38	-	(946) 168-6608	farmer38@example.com	Thrishamahi Bandari
	Farmer 36	-	(912) 073-7812	farmer36@example.com	Thrishamahi Bandari
	Farmer 34	-	(948) 616-1355	farmer34@example.com	Thrishamahi Bandari
	Farmer 32	-	(945) 339-6611	farmer32@example.com	Thrishamahi Bandari
	Farmer 29	-	(959) 981-2010	farmer29@example.com	Thrishamahi Bandari
	Farmer 27	-	(970) 073-7249	farmer27@example.com	Thrishamahi Bandari
	Farmer 9	-	(964) 627-7764	farmer9@example.com	Thrishamahi Bandari
	Farmer 5	-	(991) 357-4863	farmer5@example.com	Thrishamahi Bandari
Subtotal					
South (10)	Bandari	FRUIT MARKET	9000000009	bandari@gmail.com	Thrishamahi Bandari
	Farmer 33	-	(927) 508-8298	farmer33@example.com	Thrishamahi Bandari
	Farmer 26	-	(973) 936-6759	farmer26@example.com	Thrishamahi Bandari

Report: Farmers

Farmers Report

Enable Field Editing

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Region	Farmer: Farmer Name	Market	Phone	Email	Farmer: Owner Name
South (10)	Bandari	FRUIT MARKET	9000000009	bandari@gmail.com	Thrishamahi Bandari
	Farmer 33	-	(927) 508-8298	farmer33@example.com	Thrishamahi Bandari
	Farmer 26	-	(973) 936-6759	farmer26@example.com	Thrishamahi Bandari
	Farmer 19	-	(948) 694-7729	farmer19@example.com	Thrishamahi Bandari
	Farmer 18	-	(939) 360-4382	farmer18@example.com	Thrishamahi Bandari
	Farmer 17	-	(984) 033-2892	farmer17@example.com	Thrishamahi Bandari
	Farmer 16	-	(922) 614-4506	farmer16@example.com	Thrishamahi Bandari
	Farmer 14	-	(982) 689-3945	farmer14@example.com	Thrishamahi Bandari
	Farmer 10	-	(973) 723-9647	farmer10@example.com	Thrishamahi Bandari
	Thrisha	-	9000000006	thrisha@gmail.com	Thrishamahi Bandari
Subtotal					
East (20)	Farmer 47	-	(967) 229-3972	farmer47@example.com	Thrishamahi Bandari
	Farmer 46	-	(963) 425-0773	farmer46@example.com	Thrishamahi Bandari
	Farmer 45	-	(934) 255-8844	farmer45@example.com	Thrishamahi Bandari
	Farmer 42	-	(981) 145-4287	farmer42@example.com	Thrishamahi Bandari

Report: Farmers

Farmers Report

Enable Field Editing

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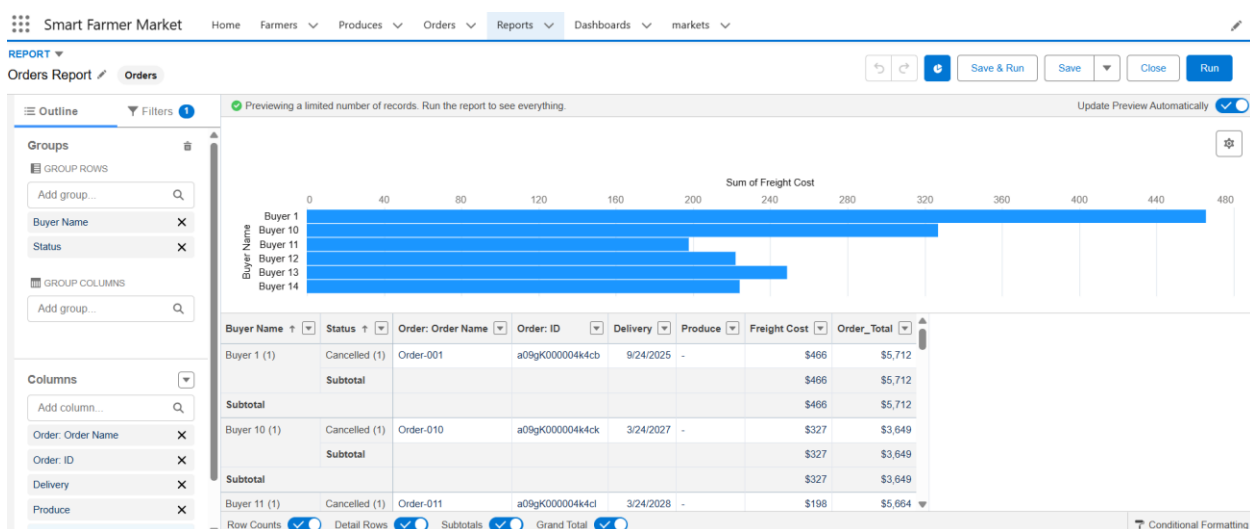
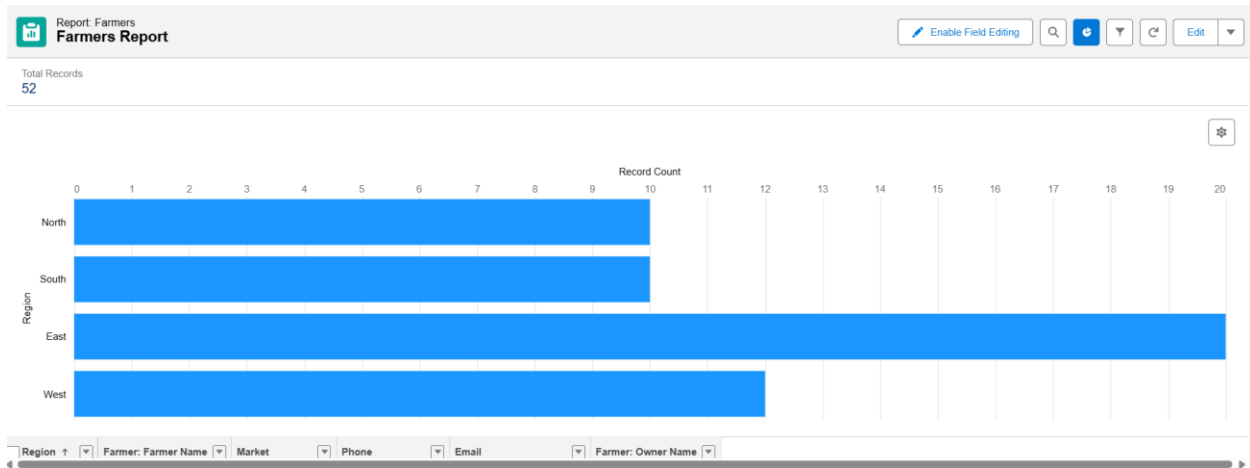
Region	Farmer: Farmer Name	Market	Phone	Email	Farmer: Owner Name
Subtotal					
West (12)	Farmer 50	-	(937) 916-4004	farmer50@example.com	Thrishamahi Bandari
	Farmer 49	-	(999) 252-8692	farmer49@example.com	Thrishamahi Bandari
	Farmer 48	-	(946) 139-4351	farmer48@example.com	Thrishamahi Bandari
	Farmer 40	-	(971) 724-3340	farmer40@example.com	Thrishamahi Bandari
	Farmer 30	-	(928) 958-3488	farmer30@example.com	Thrishamahi Bandari
	Farmer 28	-	(955) 555-6999	farmer28@example.com	Thrishamahi Bandari
	Farmer 25	-	(973) 274-6392	farmer25@example.com	Thrishamahi Bandari
	Farmer 23	-	(938) 577-4760	farmer23@example.com	Thrishamahi Bandari
	Farmer 22	-	(945) 711-0097	farmer22@example.com	Thrishamahi Bandari
	Farmer 21	-	(998) 510-8408	farmer21@example.com	Thrishamahi Bandari
	Farmer 12	-	(915) 693-6301	farmer12@example.com	Thrishamahi Bandari
	Farmer 8	-	(963) 257-2121	farmer8@example.com	Thrishamahi Bandari
Subtotal					
Total (52)					

Row Counts

Detail Rows

Subtotals

Grand Total



## 4. Steps for Creating Dashboards

### A. Create a Dashboard Folder

1. Go to **Dashboards** → **New Dashboard**.
2. Name it **Farmers Market Dashboard**.
3. Choose a folder accessible by team members.

### B. Add Components

1. Click + **Component**.
2. Select a report as the data source.
3. Choose a visualization:

- **Bar Chart** → Farmer Sales Comparison
- **Pie Chart** → Produce Demand Distribution
- **Gauge** → Monthly Revenue Target Achievement
- **Table** → Buyer Order Details
- **Line Chart** → Sales Trend by Month

4. Configure filters (e.g., Order Date, Farmer, Buyer).

## C. Save and Share

- Save dashboard as **Farmers Market Dashboard**.
- Share with Admins, Farmers, and Market Managers based on access.

