AgriTrust Connect- Phase 9: Reporting, Dashboards & Security Review (Admin) Report

Project Title: AgriTrust Connect - Sustainable Agriculture CRM

Phase: 9 - Reporting, Dashboards & Security Review

Date: 25 September 2025 **Prepared By:** SRI VAISHNAVI B

1. Introduction

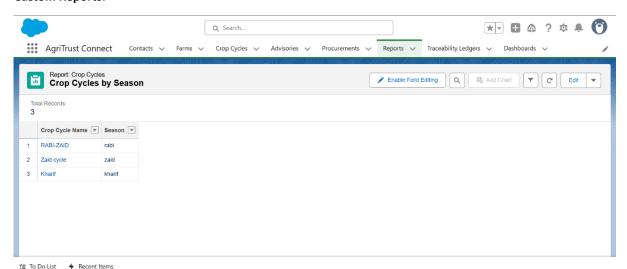
Phase 9 focused on translating the application's raw data into actionable insights for key stakeholders. This was achieved by building a suite of custom reports and an interactive dashboard. This phase also included a comprehensive security review to harden the application, ensuring that data is not only visible and useful but also well-protected according to the principle of least privilege.

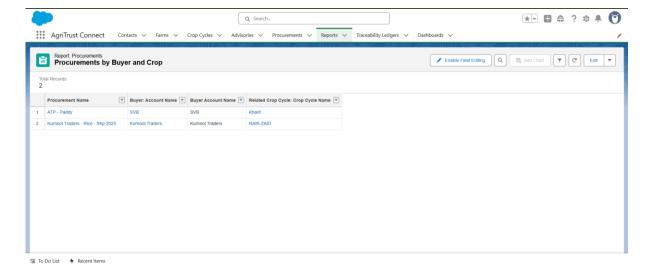
2. Reports & Analytics

Purpose: To create visualizations and data summaries that support business decision-making for various user roles.

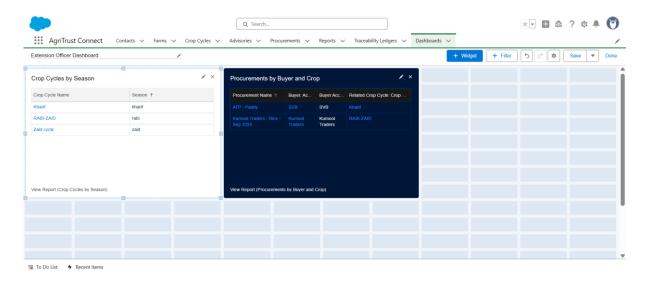
Component	Implementation Details
Custom Reports	Several key operational reports were built to analyze core business metrics. This included a Summary Report to group Crop Cycles by Season (Kharif vs. Rabi) and a Matrix Report to analyze Procurements by both Buyer and Crop type.
Custom Report Types	Custom Report Types were created for the Crop Cycle and Procurement objects. These custom types serve as the essential templates for building any report that requires data from these specific objects.
Dashboards	An Extension Officer Dashboard was created to provide at-a-glance visualizations of key metrics. It was configured as a Dynamic Dashboard , allowing it to display data specific to the viewing user (e.g., showing only the farmers they manage), thus personalizing the experience and reducing the need for multiple dashboards.

1. Custom Reports:





2. Dashboards



3. Security & Access Review

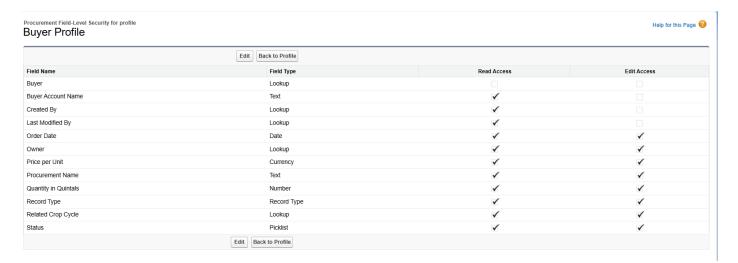
Purpose: To verify and strengthen the application's security posture before the final presentation.

Security Area	Actions Taken
Sharing Model Verification	A thorough review of the org's sharing model was conducted. Organization-Wide Defaults (OWD) were confirmed to be Private for Contact (Farmer) and Controlled by Parent for Crop Cycle to ensure a secure baseline for record visibility.
Field-Level Security (FLS) Audit	Field-Level Security was audited for key user profiles, such as the Buyer profile, to ensure that sensitive or internal-only fields on objects like Procurement were not visible or editable.
System Access Policies	System access policies were hardened by reviewing Session Settings , including session timeout values. Login IP Ranges for the System Administrator profile were also configured to restrict access to trusted networks.

1. Sharing Model Verification:

Help for this Page 🕢 Organization-Wide Sharing Defaults Edit Edit your organization-wide sharing defaults below. Changing these defaults will cause all sharing rules to be recalculated. This could require significant system resources and time depending on the amount of data in your organization. Setting an object to Private makes records visible to record owners and those above them in the role hierarchy, and access can be extended using sharing rules. Save Cancel Object Lead Public Read/Write/Transfer ✓ Private **∨** Ø Account and Contract Public Read/Write ✓ Private Order Controlled by Parent ✓ Controlled by Parent ✓ ~ Contact Private Controlled by Parent ✓ V Asset Controlled by Parent > Controlled by Parent ✓ **V** Public Read/Write ✓ Private **V** Case Public Read/Write/Transfer ✓ Private **∨** Campaign Public Full Access 🗸 Private \checkmark Campaign Member Controlled by Campaign Controlled by Campaign \checkmark User Public Read Only V Individual Public Read/Write ✓ Private \checkmark Voice Call Private Private \checkmark Activity Private **V**

2. Field-Level Security (FLS) Audit:



3. System Access Policies:



4. Phase 9 Outcome

- The application is now equipped with powerful, role-specific analytics to drive informed decision-making for all users.
- The security posture of the application has been verified and strengthened across the data, user, and system levels.
- AgriTrust Connect is now feature-complete, secure, and ready for the final presentation and project demonstration.