

Reporting, Dashboards & Security Review – Phase 9

1. Reports

Reports in Salesforce allow you to organize, analyze, and summarize data stored in your CRM objects like Crop Listings, Buyer Requirements, and Farming Orders. With reports, users can answer questions such as how many crops were sold last month or which buyers have the highest demands. Standard report formats like Tabular (simple lists), Summary (grouped and aggregated data), Matrix (cross-tabulated data), and Joined (combination of multiple reports) give flexibility in data presentation. These reports can be filtered dynamically to meet various operational needs and support decision-making at multiple levels of your agricultural business. Real-time data ensures insights are always current and actionable.

The screenshot displays the Salesforce Reports interface. At the top, there's a navigation bar with the Salesforce logo, a search bar, and various utility icons. Below this is a breadcrumb trail: Smart Farming CRM > Crop Listings > Buyer Requirements > Farming Orders > Shipments > Payments > Feedbacks > Cases > Reports > Dashboards. The main content area is titled 'Reports' and 'Private Reports'. It features a search bar for private reports, buttons for 'New Report' and 'New Folder', and a settings icon. A table lists the reports, with one item visible: 'New Crop Listings Report' in the 'Private Reports' folder, created by 'Makkena Vighnasri' on '9/30/2025, 9:12 AM'. The left sidebar shows a navigation menu with categories: REPORTS (Recent, Created by Me, Private Reports, Public Reports, All Reports), FOLDERS (All Folders, Created by Me, Shared with Me), and FAVORITES.

Report Name	Description	Folder	Created By	Created On	Subscribed
New Crop Listings Report		Private Reports	Makkena Vighnasri	9/30/2025, 9:12 AM	

2. Dashboards

Dashboards compile multiple reports into a single, visual interface that highlights critical metrics and trends through charts, gauges, and tables. For your CRM, dashboards can display crop inventory levels, sales progress, order fulfillment statuses, and buyer engagement statistics. This unified view helps managers and farmers monitor operations efficiently.

