

How do I create custom reports?

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Farmbrite works with many different types of livestock and farm operations. Our customers are diverse, raising different animals and producing unique harvests in different locations all around the globe. We've designed dozens of standard reports that are helpful to most of our users, but we know that business needs vary, and customization is critical to successful operations. Because of that, **we offer a comprehensive custom report builder** that lets you select exactly what you want to see on your report, so you can find just the data you need without anything you don't. The goal here is flexibility; we want you to get what you need.

Building a custom report is a 4 step process, and **Farmbrite walks you through each step with a report building wizard**. To start, navigate to Reports in the main menu, and choose Custom Reports. You'll see a list of any previously created Custom Reports you can run, and the option to create a new report.

The screenshot shows the Farmbrite dashboard interface. On the left is a sidebar menu with icons and labels for various features: Schedule, Tasks, Livestock, Plantings, Resources, Accounting, Market, Contacts, Farm Map, and Reports (which is currently selected and highlighted with a dark background). The main content area displays weather information for 'NEDERLAND', including a large temperature of 41°F, a cloud icon, and details like 'Overcast Clouds - H 55°F L 37°F', 'Sunset: 8:15PM', 'Wind: 2 mph', 'Humidity: 62%', 'Feels like 41°F', 'Sky Cover: 100%', and '1-Hr Precip: 0mm'. Below the weather is a table showing hourly forecasts from 10AM to 3PM, with columns for temperature, wind speed, and humidity. At the bottom, there are two sections: 'TOP UPCOMING TASKS' listing 'Train Vines' (due May 15, 2023) and 'Small issues with Loader - sticky/not going up ... - John Deere 1025R Tractor', and 'RECENT ORDERS' which shows 'Not Enough Data to Chart'. A mouse cursor is visible over the 'Reports' menu item in the sidebar.

You'll first be asked to configure your Report Settings. You need to give the report a name, and then select a section of Farmbrite to report on. You'll have multiple selections for crops and livestock; you can report on Notes, Transactions, Treatments, Harvests/Yields, and the animal records in general. You could also choose to report on Orders, Tasks, Inventory, Equipment, or your Accounting needs. Each section includes a brief description of what you can expect to see on the report.

You can only choose one here; select the one you'd like to use, and the wizard will prompt you to move to the next step to select your columns. In our example we're going to build an Equipment report that includes maintenance information and current equipment status.

farmbrite Search... Quick Add Account Chris Help

Schedule
Tasks
Livestock
Plantings
Resources
Accounting
Market
Contacts
Farm Map

Reports
 Standard Reports
 Custom Reports

New Custom Report

Settings

Report Name

Choose reporting area
 This determines what information is available and displayed for your report

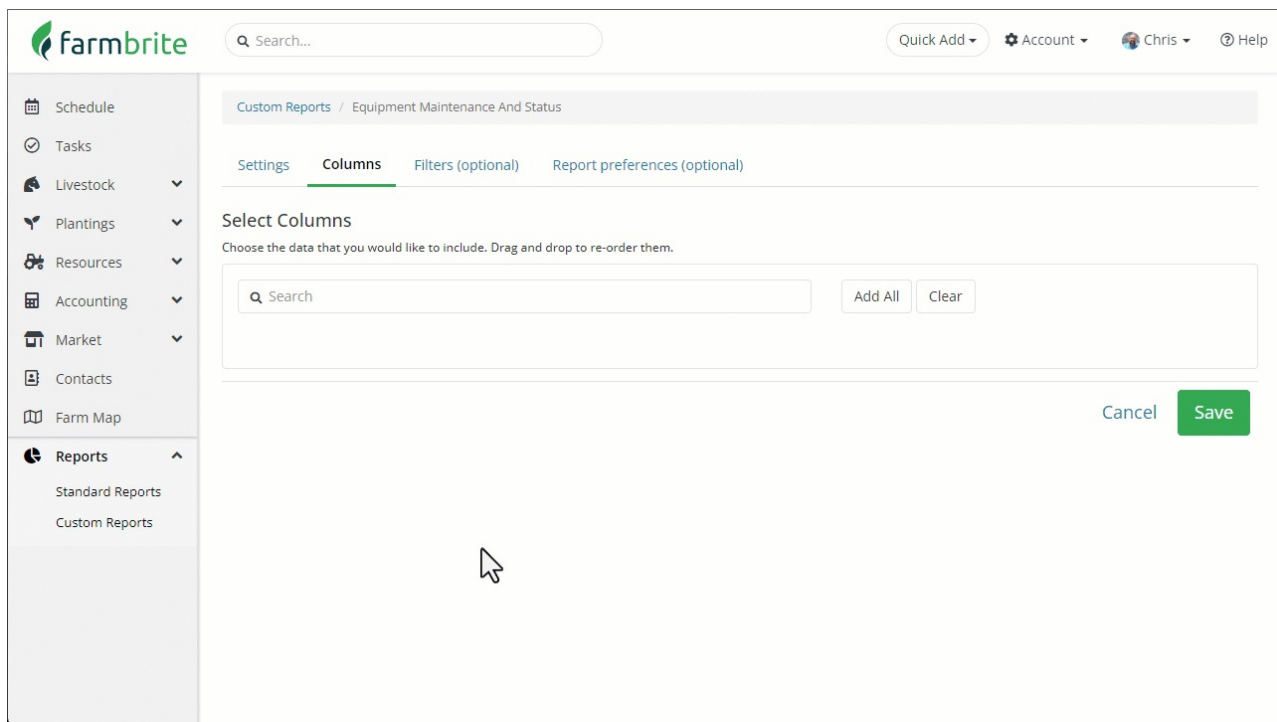
- ☐ Accounting
Income and expenses accounting transactions
- ☐ Crop Harvests
Harvest / yield records for crop plantings
- ☐ Crop Notes
Notes records for plantings
- ☐ Crop Transactions
Accounting transactions associated to individual crop types
- ☐ Crop Treatments
Treatment and fertilization records for individual plantings
- ☐ Crops
Top level / base individual crop planting records
- ☐ Equipment
Top level / base individual equipment records
- ☐ Equipment Maintenance
Maintenance and service records for individual equipment
- ☐ Inventory Logs
Inventory history details for changes in inventory levels
- ☐ Livestock
Top level / base individual animal records
- ☐ Livestock Notes
Notes for individual animals
- ☐ Livestock Transactions
Accounting transactions associated to individual animals
- ☐ Livestock Treatments
Treatment and procedure records for individual animals
- ☐ Livestock Yield
Yield records for individual animals
- ☐ Orders
Online and manual orders and invoices
- ☐ Tasks
Completed and due tasks

Step 2 lets you choose what data to include on the report. The fields you can add differ based on the report type selection you made in the previous step. For example, the fields in the Crop Treatment reporting area would include things like treatment date, treatment type, and retreat date, while the Equipment reporting area would have fields like model, brand, and serial number.

When you click on the search box, a list of all available fields will be shown. You can type in the box to look for specific fields, or scroll through the list to see what's available. You could also add or clear all fields using the buttons to the right of the box.

Once you've added fields, you can drag and drop them to reorder them. The order they are shown on this page will reflect as the order they are displayed as columns on your report. Think of this like a spreadsheet, the first field is column A, the second field is column B, and so on. We moved Status to the second column in our example below.

If you mistakenly add a field you didn't need, click the red X on the right to remove it.



The next two steps are optional. They will help you find the specific data you are looking for and control the way the report is displayed, but if you just want a basic sheet of data, you can click Save and the report will generate. Check out our result in the image above; it's pretty basic, so we will click Edit and then move on to the next two optional steps.

Step 3 lets you filter this report. We created a report for our Equipment, but do we necessarily need the chainsaw, tractor, and snowblower in the report mixed with our pick up trucks and side-by-side ATV? We can put additional filters on the report to only returns results that we need.

For our Equipment report example, we can filter by name, brand, status, type, or date purchased. However, these filters are different based on the reporting area. For example, if we were creating an Accounting report, we would see filters like Transaction Type, Payee, Transaction Date, etc.

For our Equipment filter, we will set that Equipment Type equals "Vehicle". This will remove the tools we did not want to see. Note that you could also use "start with" or "contains" as filters as well to expand or limit your search results.

Quick Add

Account

Chris

Help

Schedule

Tasks

Livestock

Plantings

Resources

Accounting

Market

Contacts

Farm Map

Reports

Standard Reports

Custom Reports

Criteria:

Records

8

100% Of 8 Total

<input type="checkbox"/>	Equipment Name	Equipment Status	Equipment Brand	Equipment Type	Equipment Last Service Date
<input type="checkbox"/>	Jeep Wrangler	In Use	Jeep	Vehicle	Feb. 25, 2022
<input type="checkbox"/>	Stihl MS 270		Stihl	Tool	May. 24, 2022
<input type="checkbox"/>	1987 Chevrolet K2500 Silverado	Maintenance	Chevrolet	Vehicle	May. 09, 2023
<input type="checkbox"/>	John Deere	Maintenance	1025R	Tractor	Mar. 16, 2022
<input type="checkbox"/>	Snow Blower		Troy Built	Tool	Sep. 24, 2022
<input type="checkbox"/>	F-150	Decommissioned	Ford	Vehicle	May. 24, 2021
<input type="checkbox"/>	Polaris Side-by-Side ATV	In Use	Polaris	Vehicle	Apr. 24, 2023
<input type="checkbox"/>	Chevrolet Colorado	In Use	Chevrolet	Vehicle	

Displaying all 8 records

Created on May. 24, 2023 by Chris. Last updated on May. 24, 2023. Report Loaded in 0.0 seconds.

Step 4 has you set up report preferences. This includes things like how to order and group the data on the report, or choosing to display it visually as charts and graphs as well. There is so much you can do here! In our example below we have sorted the records by the equipment's Last Service Date, and included charts for brand and status. Now we can easily see what might need maintenance and what it's current status is.

Quick Add

Account

Chris

Help

Custom Reports / Equipment Maintenance And Status

Equipment Maintenance and Status

Edit Report Download

Criteria: Type: Vehicle

Records

5

63% Of 8 Total

<input type="checkbox"/>	Equipment Name	Equipment Status	Equipment Brand	Equipment Type	Equipment Last Service Date
<input type="checkbox"/>	Jeep Wrangler	In Use	Jeep	Vehicle	Feb. 25, 2022
<input type="checkbox"/>	1987 Chevrolet K2500 Silverado	Maintenance	Chevrolet	Vehicle	May. 09, 2023
<input type="checkbox"/>	F-150	Decommissioned	Ford	Vehicle	May. 24, 2021
<input type="checkbox"/>	Polaris Side-by-Side ATV	In Use	Polaris	Vehicle	Apr. 24, 2023
<input type="checkbox"/>	Chevrolet Colorado	In Use	Chevrolet	Vehicle	

Displaying all 5 records

Created on May. 24, 2023 by Chris. Last updated on May. 24, 2023. Report Loaded in 0.01 seconds.

OK, now you've got the basics. You can choose your reporting area, add your columns, filter to limit your results, add charts for a visual appeal, and sort your report in the order that works best for you. Now let's take our equipment example a step further. What if we did actually want to see those tools from the original report (the snowblower, tractor, and chainsaw), but we just needed them separated? Well, **we can use the Group By feature to make sections within the report.** In our example below, we've removed

the filter for Type = Vehicle, and now selected to Group By Type instead. Our results are now divided into subcategories representing each different type of equipment we have.

The screenshot displays the Farmbrite web application interface. On the left is a sidebar with navigation icons and labels: Schedule, Tasks, Livestock, Plantings, Resources, Accounting, Market, Contacts, Farm Map, and Reports (expanded to show Standard Reports and Custom Reports). The main content area is titled 'Equipment Maintenance with Status' and shows a breadcrumb trail 'Custom Reports / Equipment Maintenance With Status'. Below the title, there's a filter 'Criteria: Type: Vehicle' and a summary box indicating 'Records: 5' and '63% Of 8 Total'. A table lists the equipment records:

<input type="checkbox"/>	Equipment Name	Equipment Status	Equipment Brand	Equipment Type	Equipment Last Service Date ^
<input type="checkbox"/>	Chevrolet Colorado	In Use	Chevrolet	Vehicle	
<input type="checkbox"/>	1987 Chevrolet K2500 Silverado	Maintenance	Chevrolet	Vehicle	May. 09, 2023
<input type="checkbox"/>	Jeep Wrangler	In Use	Jeep	Vehicle	Feb. 25, 2022
<input type="checkbox"/>	F-150	Decommissioned	Ford	Vehicle	May. 24, 2021
<input type="checkbox"/>	Polaris Side-by-Side ATV	In Use	Polaris	Vehicle	Apr. 24, 2023

Below the table, it says 'Displaying all 5 records' and 'Created on May. 24, 2023 by Chris. Last updated on May. 24, 2023. Report Loaded in 0.0 seconds.' In the top right corner of the report area, there are buttons for 'Edit Report', 'Download', and a print icon.

No matter what filters, groups, or data you include, you can always download or print the data using the buttons in the upper right of the results page.

And now it's your turn! Go ahead and make some reports, and feel free to [reach out if you have questions](#). Or just drop a line and let us know what you made, and how you're using it. Maybe it's something that could benefit other Farmbrite users that we could turn into a standard report, with kudos to you, of course!