

View Setup Audit Trials

- Setup audit trail shows a list of changes done by users in the org in different components.
- One can download past 6 months changes.

Steps to show the Setup audit trails:

- Go to setup click on home and in quick search type view setup audit trails.
- After that click on it you will see all the records who changes which filed with date and time.

The screenshot shows the 'View Setup Audit Trail' page in the Salesforce Setup interface. The page title is 'View Setup Audit Trail'. It displays a table of recent changes made by user 'zahidies4@cognizant.com' on various dates between 15/09/2023 and 18/09/2023. The table includes columns for Date, User, Source Namespace Prefix, Action, Section, and Delegate User. A note at the top says 'The last 20 entries for your organization are listed below. You can download your organization's setup audit trail for the last six months (Excel .csv file)'. A red box highlights the 'View Setup Audit Trail' link in the sidebar.

Date	User	Source Namespace Prefix	Action	Section	Delegate User
18/09/2023, 8:56:19 pm IST	zahidies4@cognizant.com		Changed tabs of custom app Zahid Khan Tech school	Custom Apps	
15/09/2023, 5:55:27 pm IST	zahidies4@cognizant.com		Changed Student page layout Student Layout	Custom Objects	
15/09/2023, 5:55:00 pm IST	zahidies4@cognizant.com		Changed Student page layout Experienced Layout	Custom Objects	
15/09/2023, 5:54:12 pm IST	zahidies4@cognizant.com		Changed Student page layout Fresher layout	Custom Objects	
15/09/2023, 5:34:48 pm IST	zahidies4@cognizant.com		Track History for Student field Salesforce skill set on	Track Field History	
15/09/2023, 5:34:48 pm IST	zahidies4@cognizant.com		Track History for Student field Brief Bio on	Track Field History	
15/09/2023, 5:34:48 pm IST	zahidies4@cognizant.com		Track History for Student field Stream on	Track Field History	
15/09/2023, 5:34:48 pm IST	zahidies4@cognizant.com		Track History for Student field Phone on	Track Field History	
15/09/2023, 5:34:48 pm IST	zahidies4@cognizant.com		Track History for Student field Name on	Track Field History	
15/09/2023, 5:34:48 pm IST	zahidies4@cognizant.com		Track History for Student field Email on	Track Field History	
15/09/2023, 5:11:15 pm IST	zahidies4@cognizant.com		Changed Lightning Page: Student Record Page	Lightning Pages	

- we can also download records of 6 months in excel file.

The screenshot shows the 'View Setup Audit Trail' page in the Salesforce Setup interface. The page title is 'View Setup Audit Trail'. It displays a table of recent changes made by user 'zahidies4@cognizant.com' on various dates between 15/09/2023 and 15/09/2023. A red box highlights the 'Download setup audit trail for last six months (Excel .csv file)' link at the bottom of the page.

Date	User	Source Namespace Prefix	Action	Section	Delegate User
15/09/2023, 5:34:48 pm IST	zahidies4@cognizant.com		Track History for Student field Salesforce skill set on	Track Field History	
15/09/2023, 5:34:48 pm IST	zahidies4@cognizant.com		Track History for Student field Brief Bio on	Track Field History	
15/09/2023, 5:34:48 pm IST	zahidies4@cognizant.com		Track History for Student field Stream on	Track Field History	
15/09/2023, 5:34:48 pm IST	zahidies4@cognizant.com		Track History for Student field Phone on	Track Field History	
15/09/2023, 5:34:48 pm IST	zahidies4@cognizant.com		Track History for Student field Name on	Track Field History	
15/09/2023, 5:34:48 pm IST	zahidies4@cognizant.com		Track History for Student field Email on	Track Field History	
15/09/2023, 5:11:15 pm IST	zahidies4@cognizant.com		Changed Lightning Page: Student Record Page	Lightning Pages	
15/09/2023, 5:01:17 pm IST	zahidies4@cognizant.com		Feed Tracking for Student field Salesforce Role on	Feed Tracking	
15/09/2023, 5:01:17 pm IST	zahidies4@cognizant.com		Feed Tracking for Student field Phone on	Feed Tracking	
15/09/2023, 5:01:17 pm IST	zahidies4@cognizant.com		Feed Tracking for Student field Name on	Feed Tracking	
15/09/2023, 5:01:17 pm IST	zahidies4@cognizant.com		Feed Tracking for Student field Father Name on	Feed Tracking	
15/09/2023, 5:01:17 pm IST	zahidies4@cognizant.com		Feed Tracking for Student field Email on	Feed Tracking	
15/09/2023, 5:01:17 pm IST	zahidies4@cognizant.com		Feed Tracking for Student on	Feed Tracking	
15/09/2023, 4:43:24 pm IST	zahidies4@cognizant.com		Changed Lightning Page: Student Record Page	Lightning Pages	
15/09/2023, 4:21:40 pm IST	zahidies4@cognizant.com		Changed Lightning Page: Student Record Page	Lightning Pages	
15/09/2023, 4:16:50 pm IST	zahidies4@cognizant.com		Changed Lightning Page: Student Record Page	Lightning Pages	

Day-08

Reports on standard object

What is Report?

- Report is a list of records related to objects that meet the criteria defined.
- One can filter, group, and do math's on reports.
- One can display reports graphically through chart.
- Every report is stored in a folder.
- Report folders determines how one can access reports to view, edit, or manager.
- Report folders can be public, hidden, or shared.

Report builder:

- Here you can create a report.
- You need to select a record type.
- Select fields to display in report.
- Apply filters.
- Group report based on rows and columns.
- Run reports.
- Save reports.

Filters:

There are 4 types of filters.

- Standard filter
Show me & created date.
- Field filter
Specific to field.
- Filter logic
Boolean condition to control filed filters.
- Cross filter
Filter a report by child object using with or without condition.

Report Format:

- Tabular
Make a list (same as list view).
- Summary
Group & summarize.
- Matrix

Group & summarize by Row and column.

- Joined
- Report on multiple report types.

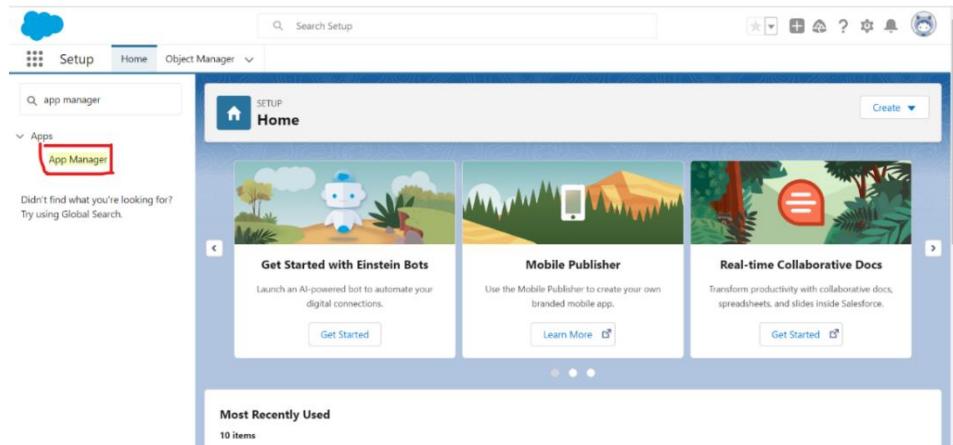
Report folders:

As every report is stored in a folder, so:

- Report folder determines how one can access reports to view, edit, or manage.
- Report folders can be public, hidden, or shared.
- We can control access of contents of the folder based on roles, permissions, public groups, territories, and license types.

Steps to create Tabular report using standard object:

- To make report in our App using standard object. We have to add **Report** and **Dashboard** tab in our app.
- To add Report and Dashboard click on setup after that click on **Quick Find** and type App manager.



- After that click on App manager and go to our App **Zahid khan Tech school** and click on edit.

App Name	Developer Name	Description	Last Modified	Ap...	Vi...
Sales	Sales	The world's most popular sales force automation ...	16/08/2023, 4:14 pm	Classic	
Sales	LightningSales	Manage your sales process with accounts, leads, ...	16/08/2023, 4:14 pm	Lightning	
Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with ...	16/08/2023, 4:14 pm	Lightning	
Salesforce Chatter	Chatter	The Salesforce Chatter social network, including p...	16/08/2023, 4:14 pm	Classic	
Salesforce Scheduler	LightningScheduler	Set up personalized appointment scheduling.	16/08/2023, 4:16 pm	Lightning	
Service	Service	Manage customer service with accounts, contacts,...	16/08/2023, 4:14 pm	Classic	
Service Console	LightningService	(Lightning Experience) Lets support agents work ...	16/08/2023, 4:14 pm	Lightning	
Site.com	Sites	Build pixel-perfect, data-rich websites using the d...	16/08/2023, 4:14 pm	Classic	
Subscription Mana...	RevenueCloudConsole	Get started automating your revenue processes	16/08/2023, 4:14 pm	Lightning	
Zahid khan Tech sc...	Zahid_khan_Tech_school		13/09/2023, 10:32 ...	Lightning	

- After that click on navigation item.

App Settings

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Type to filter list... Create ▾

- Accounts
- Alert Settings
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Invitations

Selected Items

- Home
- Zahid khan App page
- Students
- Instructors
- classes
- StdClasses

- 1st search **Report** in Available items and insert **Report** in selected items.

App Settings

Navigation Items

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Available Items

Type to filter list... Create ▾

- Reports

Selected Items

- Home
- Zahid khan App page
- Students
- Instructors
- classes
- StdClasses

- Now search for Dashboard in available items and insert in selected items.

Back ➔ Settings

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Type to filter list... Create ▾

- Dashboards

Selected Items

- Home
- Zahid khan App page
- Students
- Instructors
- classes
- StdClasses
- Reports

- Now click on save. Now go to App and check.

The screenshot shows the application's main navigation bar at the top with various menu items like Home, Students, Instructors, classes, StdClasses, Reports, and Dashboards. Below the navigation is a search bar and some quick access icons. The main content area is titled 'Reports' and 'Recent'. It lists a single report entry: 'Sample Flow Report: Screen Flows' created by 'Automated Process' on '16/8/2023, 4:14 pm'. On the left, there are sidebar links for Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), Folders (All Folders, Created by Me, Shared with Me), and a JavaScript void link at the bottom.

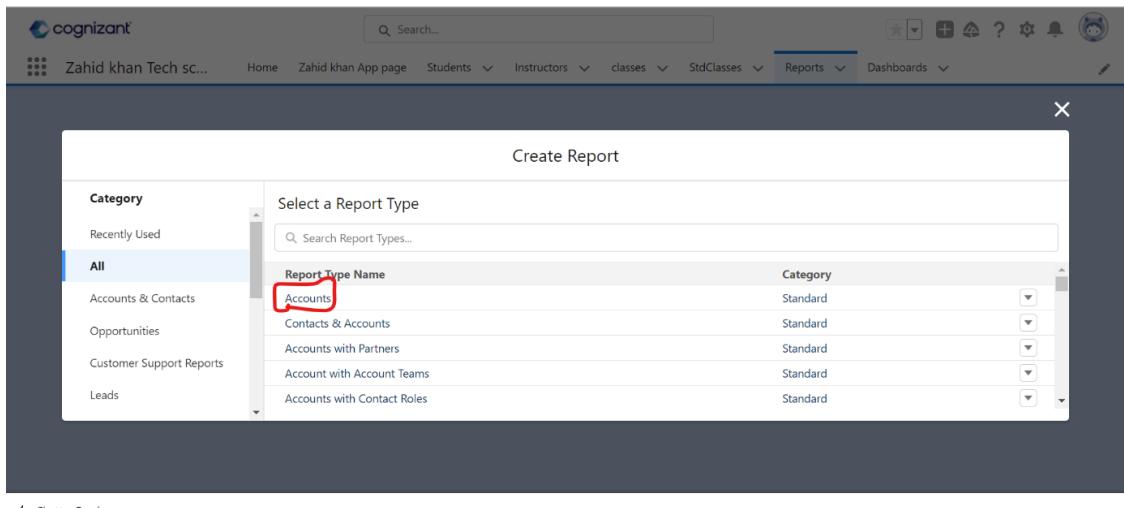
Tabular Report

Steps to creating tabular report:

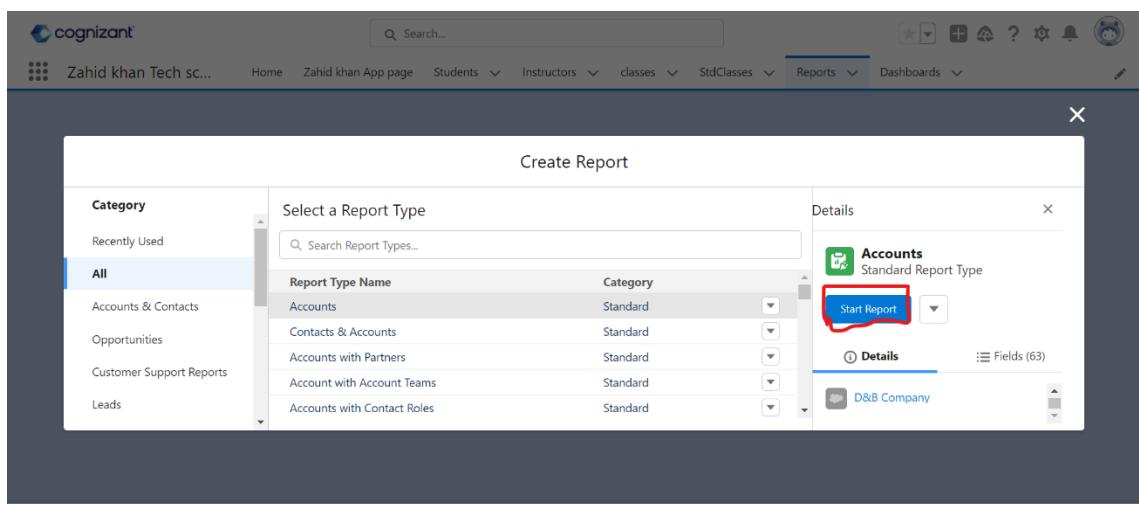
- For creating Tabular report of standard object. We have to click on **New Report**.

This screenshot is identical to the one above it, showing the application's main interface with the Reports section active. The 'New Report' button in the top right header is specifically highlighted with a red box.

- After that select record type. Here we are creating report of Account. So, select **Account**.



- After that click on **Start Report**.



- Pencil button is used to rename the reports.
- On left side on side bar, we have 2 options outline and Filter. In outline Groups is used for summary Report type and column is use for tabular report. In filter we can apply all 4 filter as mentioned above.
- From **Column** we can insert any column in report by searching its name. and always on Update Preview automatically.
- Save&Run button is used to save as well as run the report. Close is used to close the report without saving and Run is used to Run the report after save.

REPORT ▾

Tabular Report

Accounts

Fields > Outline Filters 2

No records returned. Try editing report filters:

- Show All accounts.
- Set the Created Date filter to All Time.
- Edit other filters in the filter panel.

Last Activity Account Owner Account Name Billing State/Province Type Rating Last Modified Date

Update Preview Automatically

- We can see Report text at top of the page when we click on it we got 2 option Reports and joined reports. Reports option is for tabular, summary, and matrix report. And joined report options is used for joined reports.

REPORT ▾

Ta! Choose Format

Report Add columns and filters from a single report type.

Joined Report Add blocks of the same report type or different report types.

Cancel Apply

- 1st type filter-** now click on filter we got 2 options by default **show me** and **created date** this is standard filter.
- When we click on show me, we got 4 options by default My accounts, My team's account, All accounts and filter by scope

REPORT ▾
Tabular Report / Accounts

Fields > Outline Filters 1

Filters

- Add filter...
- Show Me My accounts
- Created Date
On or after 11-Sept-2023

Last Activity Account Owner Account Name Billing State/Province Type Rating Last Modified Date

No records returned. Try editing report filters:

- Show All accounts.
- Set the Created Date filter to All Time.
- Edit other filters in the filter panel.

Update Preview Automatically

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- In show me we have to select all accounts because we want to show all accounts records on report. And click on apply.

REPORT ▾
Tabular Report / Accounts

Fields > Outline Filters 1

Filters

- Add filter...
- Show Me My accounts
- Created Date
On or after 11-Sept-2023

Last Activity Account Owner Account Name Billing State/Province Type Rating Last Modified Date

Edit Filter

Show Me
My accounts

Cancel Apply

Update Preview Automatically

Chatter Feed

- In created on we got option to show created date based on choosing date but for now we are choosing All time from Range drop down. And click on apply.

REPORT ▾
Tabular Report / Accounts

Fields > Outline Filters 1

Filters

- Add filter...
- Show Me All accounts
- Created Date
On or after 11-Sept-2023

Last Activity Account Owner Account Name Billing State/Province Type Rating Last Modified Date

Filter by Created Date

Date
Created Date

Range
All Time

All Time
Custom

Fiscal Year
Current FY

Update Preview Automatically

Chatter Feed

- Now click on Run we will see all number of records. For edit the records again click on edit.

Total Records
13

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	Automated Process	Sample Account for Entitlements	-	-	-	16/08/2023
2	-	Zahid Khan	Edge Communications	TX	Customer - Direct	Hot	16/08/2023
3	-	Zahid Khan	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	16/08/2023
4	-	Zahid Khan	Pyramid Construction Inc.	-	Customer - Channel	-	16/08/2023
5	-	Zahid Khan	Dickenson plc	KS	Customer - Channel	-	16/08/2023
6	-	Zahid Khan	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	16/08/2023
7	-	Zahid Khan	Express Logistics and Transport	OR	Customer - Channel	Cold	16/08/2023
8	-	Zahid Khan	University of Arizona	AZ	Customer - Direct	Warm	16/08/2023
9	-	Zahid Khan	United Oil & Gas Corp.	NY	Customer - Direct	Hot	16/08/2023
10	-	Zahid Khan	sForce	CA	-	-	16/08/2023

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- Now click on **save** on right hand side to add the report in folder because every record should be added in a report folder. After that enter Report name which is already filled then Report unique name will be automatically filled.

REPORT ▾
Account Tabular Report

Save Report

Report Name: Account Tabular Report

Report Unique Name: Account_Tabular_Report_ibj

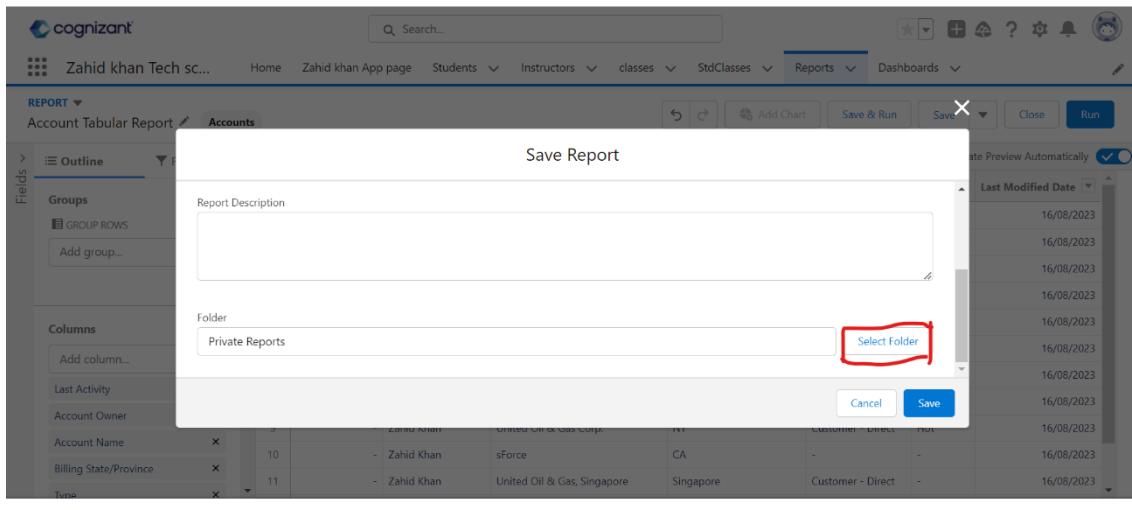
Report Description:

Cancel Save

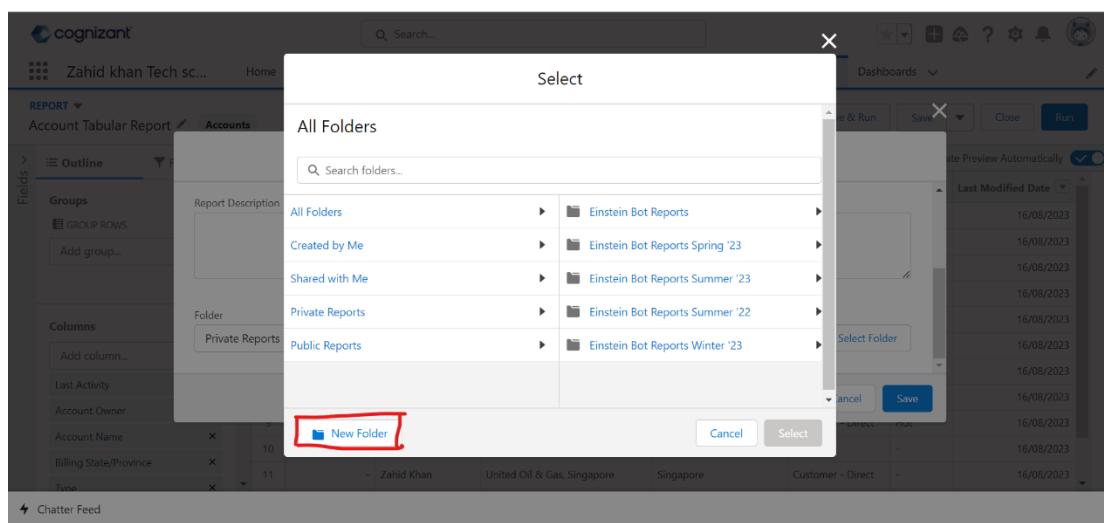
Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
-	Zahid Khan	Sample Account for Entitlements	-	-	-	16/08/2023
-	Zahid Khan	Edge Communications	TX	Customer - Direct	Hot	16/08/2023
-	Zahid Khan	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	16/08/2023
-	Zahid Khan	Pyramid Construction Inc.	-	Customer - Channel	-	16/08/2023
-	Zahid Khan	Dickenson plc	KS	Customer - Channel	-	16/08/2023
-	Zahid Khan	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	16/08/2023
-	Zahid Khan	Express Logistics and Transport	OR	Customer - Channel	Cold	16/08/2023
-	Zahid Khan	University of Arizona	AZ	Customer - Direct	Warm	16/08/2023
-	Zahid Khan	United Oil & Gas Corp.	NY	Customer - Direct	Hot	16/08/2023
-	Zahid Khan	sForce	CA	-	-	16/08/2023

Chatter Feed

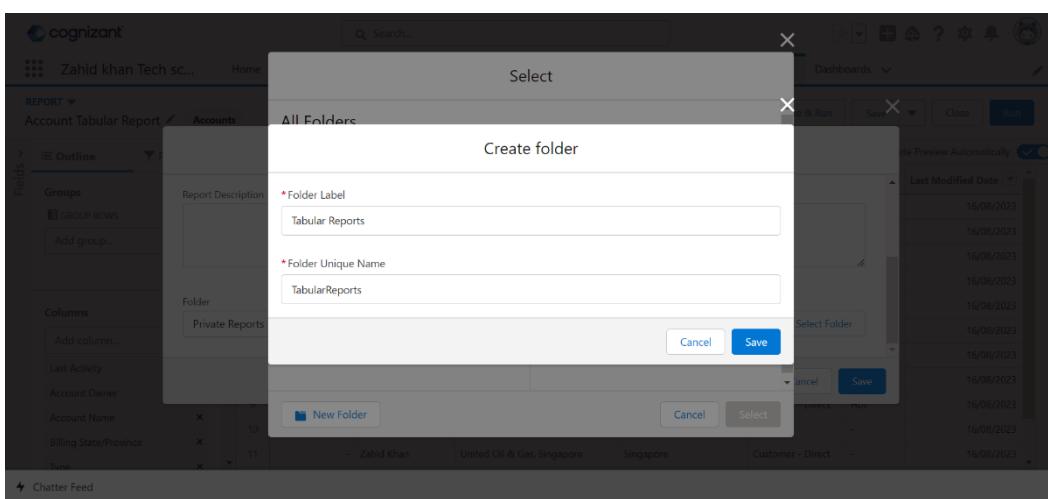
- Scroll down on save report page we will see a **Folder** drop down which is set to Private Reports but its good practice to save records in own folder. For creating a saving a report in own folder click on select folder option.



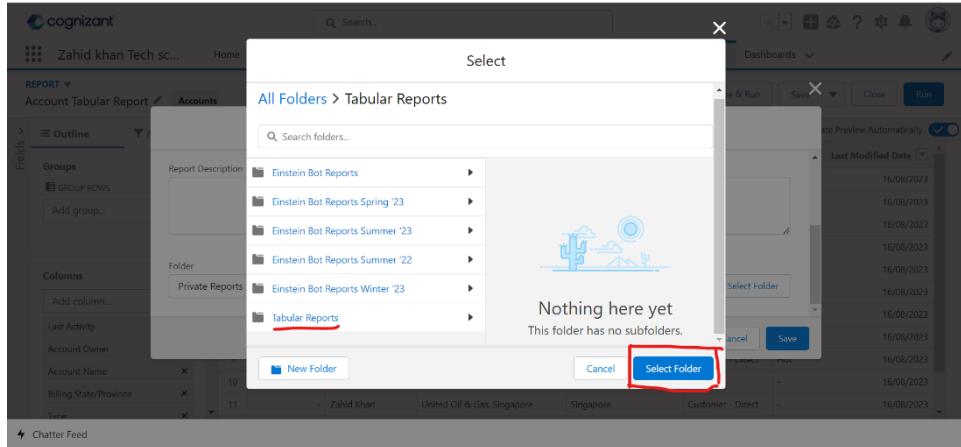
- now click on new folder option at bottom left side and make a folder named as Tabular reports. We will use this folder for all tabular reports.



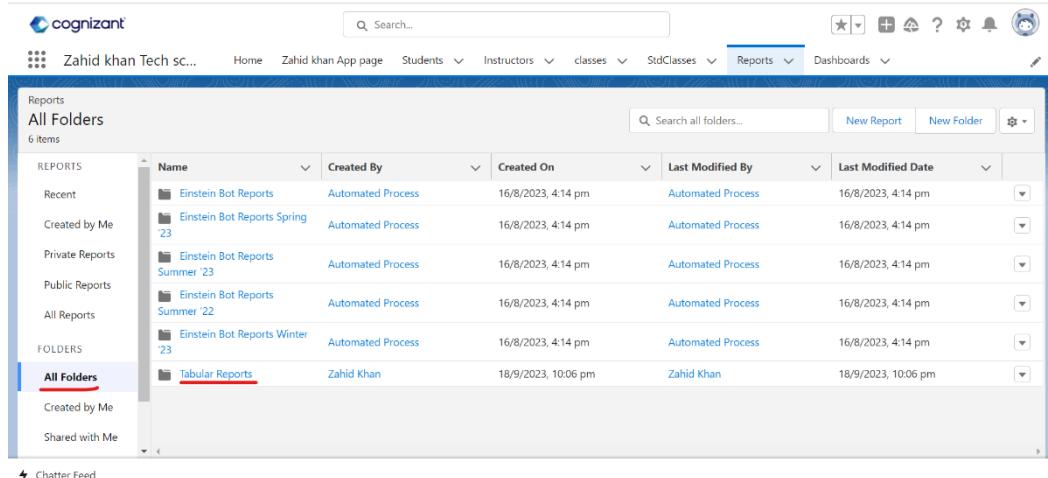
- After that enter the folder label and press tab button then unique folder label will be filled. And click on save.



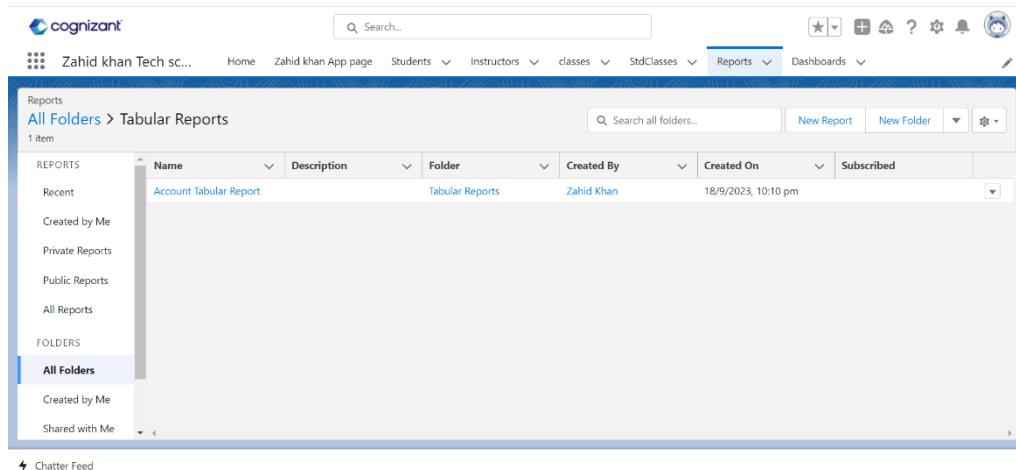
- Now Tabular Reports folder is created select this folder and click on select folder button.



- After that click on save. Now our Account reports is saved in Tabular reports folder.
- Now click on close and go to first page of the reports.
- Now click on All folder. After that click on Tabular Reports folder.



- In tabular folder we will see the Account tabular report which we created. If I open it, I will see the records.



- **2nd type filter-** Now we apply **Specific field filter** (custom filter) to the report. For example, we are applying custom filter for active if active is yes then its show only those records.
- For custom filter open reports from folder and click on edit. After that click on filters on left hand side.

The screenshot shows the Salesforce interface for a 'Accounts' report. On the left, a sidebar titled 'Filters' is open, with a red box highlighting the 'Add filter...' button. The main area displays a table of account data with columns: Account ID, Account Owner, Account Name, Annual Revenue, Industry, Active, Rating, and Last Modified Date. The 'Active' column shows values like 'Yes' and 'No'. A blue checkmark icon is visible at the top right of the table header.

Account ID	Account Owner	Account Name	Annual Revenue	Industry	Active	Rating	Last Modified Date
0015j000016w9rE	Automated Process	Sample Account for Entitlements	-	-	-	-	16/08/2023
0015j000017uBqg	Zahid Khan	Edge Communications	₹13,90,00,000	Electronics	Yes	Hot	16/08/2023
0015j000017uBqh	Zahid Khan	Burlington Textiles Corp of America	₹35,00,00,000	Apparel	-	Warm	16/08/2023
0015j000017uBqi	Zahid Khan	Pyramid Construction Inc.	₹95,00,00,000	Construction	Yes	-	16/08/2023
0015j000017uBqj	Zahid Khan	Dickenson plc	₹5,00,00,000	Consulting	Yes	-	16/08/2023
0015j000017uBqk	Zahid Khan	Grand Hotels & Resorts Ltd	₹50,00,00,000	Hospitality	Yes	Warm	16/08/2023
0015j000017uBqm	Zahid Khan	Express Logistics and Transport	₹95,00,00,000	Transportation	Yes	Cold	16/08/2023
0015j000017uBqn	Zahid Khan	University of Arizona	-	Education	Yes	Warm	16/08/2023
0015j000017uBql	Zahid Khan	United Oil & Gas Corp.	₹5,60,00,00,000	Energy	Yes	Hot	16/08/2023
0015j000017uBqr	Zahid Khan	sForce	-	-	-	-	16/08/2023
0015j000017uBqq	Zahid Khan	GenePoint	₹3,00,00,000	Biotechnology	Yes	Cold	16/08/2023

- After that search Active in **add filter** search box. And click on active then we get operator and value yes, no, all. select yes and click on apply.

The screenshot shows the Salesforce report edit screen. A modal dialog titled 'Filter by Active' is open on the left, with a red box highlighting the 'Active' dropdown in the sidebar. The dialog contains fields for 'Operator' (set to 'equals') and 'Value' (set to 'Yes'). Below these are buttons for 'All', 'No', and 'Yes'. The main report table on the right shows account data with the 'Active' column filtered to show only 'Yes' values. A blue checkmark icon is visible at the top right of the table header.

- Now which Active is yes will show in reports. It's also called specific field filter.
- After that click on save and run the reports.

REPORT ▾

Account Tabular Report ▾ Accounts

Filters

Add filter... Show Me All accounts Created Date All Time Active equals Yes

Account ID Account Owner Account Name Annual Revenue Industry Active Rating Last Modified Date

	Account ID	Account Owner	Account Name	Annual Revenue	Industry	Active	Rating	Last Modified Date
1	0015j000017uBqq	Zahid Khan	GenePoint	\$3,00,00,000	Biotechnology	Yes	Cold	16/08/2023
2	0015j000017uBqq	Zahid Khan	United Oil & Gas, UK	-	Energy	Yes	-	16/08/2023
3	0015j000017uBqp	Zahid Khan	United Oil & Gas, Singapore	-	Energy	Yes	-	16/08/2023
4	0015j000017uBqq	Zahid Khan	Edge Communications	\$13,90,00,000	Electronics	Yes	Hot	16/08/2023
5	0015j000017uBqj	Zahid Khan	Pyramid Construction Inc.	\$95,00,00,000	Construction	Yes	-	16/08/2023
6	0015j000017uBqj	Zahid Khan	Dickenson plc	\$5,00,00,000	Consulting	Yes	-	16/08/2023
7	0015j000017uBqk	Zahid Khan	Grand Hotels & Resorts Ltd	\$50,00,00,000	Hospitality	Yes	Warm	16/08/2023
8	0015j000017uBqm	Zahid Khan	Express Logistics and Transport	\$95,00,00,000	Transportation	Yes	Cold	16/08/2023
9	0015j000017uBqn	Zahid Khan	University of Arizona	-	Education	Yes	Warm	16/08/2023
10	0015j000017uBql	Zahid Khan	United Oil & Gas Corp.	\$5,60,00,00,000	Energy	Yes	Hot	16/08/2023
11				\$8,21,90,00,000				

Chatter Feed

- **3rd type filter-** For Apply the **Filter logic** first set 2 Specific filter (custom filter) then click on arrow beside the Filters option and apply AND or OR Boolean operation.

REPORT ▾

Account Tabular Report ▾ Accounts

Fields > Filters

Add filter... Show Me All accounts Created Date All Time Active equals Yes

Add Filter Logic Add Cross Filter Add Row Limit

Account ID Account Owner Account Name Annual Revenue Industry Active Rating Last Modified Date

	Account ID	Account Owner	Account Name	Annual Revenue	Industry	Active	Rating	Last Modified Date
1	0015j000017uBqq	Zahid Khan	GenePoint	\$3,00,00,000	Biotechnology	Yes	Cold	16/08/2023
2	0015j000017uBqq	Zahid Khan	United Oil & Gas, UK	-	Energy	Yes	-	16/08/2023
3	0015j000017uBqp	Zahid Khan	United Oil & Gas, Singapore	-	Energy	Yes	-	16/08/2023
4	0015j000017uBqq	Zahid Khan	Edge Communications	\$13,90,00,000	Electronics	Yes	Hot	16/08/2023
5	0015j000017uBqj	Zahid Khan	Pyramid Construction Inc.	\$95,00,00,000	Construction	Yes	-	16/08/2023
6	0015j000017uBqj	Zahid Khan	Dickenson plc	\$5,00,00,000	Consulting	Yes	-	16/08/2023
7	0015j000017uBqk	Zahid Khan	Grand Hotels & Resorts Ltd	\$50,00,00,000	Hospitality	Yes	Warm	16/08/2023
8	0015j000017uBqm	Zahid Khan	Express Logistics and Transport	\$95,00,00,000	Transportation	Yes	Cold	16/08/2023
9	0015j000017uBqn	Zahid Khan	University of Arizona	-	Education	Yes	Warm	16/08/2023
10	0015j000017uBql	Zahid Khan	United Oil & Gas Corp.	\$5,60,00,00,000	Energy	Yes	Hot	16/08/2023
11				\$8,21,90,00,000				

Chatter Feed

- We can apply AND or OR Boolean operation between more than 2 custom filter. And click on apply. Like show in below image.

REPORT ▾

Account Tabular Report ▾ Accounts

Fields > Filters

Add filter... Show Me All accounts Created Date All Time Active equals Yes

Edit Filter Logic

INCLUDE 1 AND 2 1 OR 2

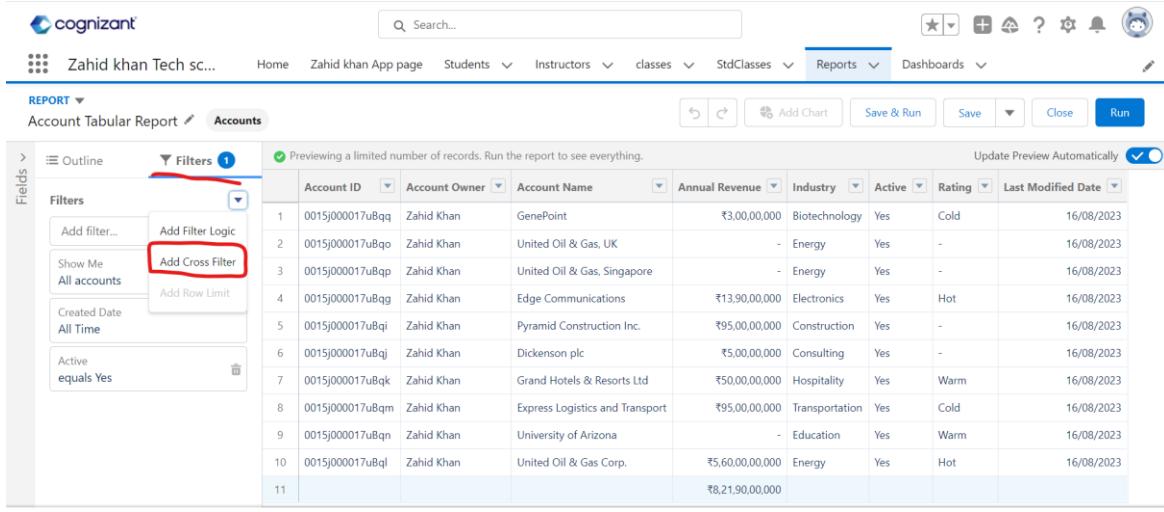
Cancel Apply

Account ID Account Owner Account Name Annual Revenue Industry Active Rating Last Modified Date

	Account ID	Account Owner	Account Name	Annual Revenue	Industry	Active	Rating	Last Modified Date
1	0015j000017uBqq	Zahid Khan	GenePoint	\$3,00,00,000	Biotechnology	Yes	Cold	16/08/2023
2	0015j000017uBqp	Zahid Khan	United Oil & Gas, UK	-	Energy	Yes	-	16/08/2023
3	0015j000017uBqp	Zahid Khan	United Oil & Gas, Singapore	-	Energy	Yes	-	16/08/2023
4	0015j000017uBqq	Zahid Khan	Edge Communications	\$13,90,00,000	Electronics	Yes	Hot	16/08/2023
5	0015j000017uBqj	Zahid Khan	Pyramid Construction Inc.	\$95,00,00,000	Construction	Yes	-	16/08/2023
6	0015j000017uBqj	Zahid Khan	Dickenson plc	\$5,00,00,000	Consulting	Yes	-	16/08/2023
7	0015j000017uBqk	Zahid Khan	Grand Hotels & Resorts Ltd	\$50,00,00,000	Hospitality	Yes	Warm	16/08/2023
8	0015j000017uBqm	Zahid Khan	Express Logistics and Transport	\$95,00,00,000	Transportation	Yes	Cold	16/08/2023
9	0015j000017uBqn	Zahid Khan	University of Arizona	-	Education	Yes	Warm	16/08/2023
10	0015j000017uBql	Zahid Khan	United Oil & Gas Corp.	\$5,60,00,00,000	Energy	Yes	Hot	16/08/2023
11				\$8,21,90,00,000				

Chatter Feed

- we can apply 4th type of filter called **cross filter**. For this open reports from folder after that click on edit then click on filter from left hand side menu and click on arrow beside filter and choose add cross filter.



The screenshot shows the Salesforce Reports interface. On the left, there's a sidebar with 'Fields' and 'Filters'. Under 'Filters', several options are listed: 'Add filter...', 'Add Filter Logic', 'Show Me All accounts', 'Created Date All Time', and 'Active equals Yes'. A red box highlights the 'Add Cross Filter' button. At the top, there's a search bar and various navigation links like Home, Students, Instructors, classes, StdClasses, Reports, and Dashboards. Below the search bar, there are buttons for 'Add Chart', 'Save & Run', 'Save', 'Close', and 'Run'. The main area displays a table of account data with columns for Account ID, Account Owner, Account Name, Annual Revenue, Industry, Active, Rating, and Last Modified Date. The table has 11 rows of data.

	Account ID	Account Owner	Account Name	Annual Revenue	Industry	Active	Rating	Last Modified Date
1	0015j000017uBqq	Zahid Khan	GenePoint	₹3,00,00,000	Biotechnology	Yes	Cold	16/08/2023
2	0015j000017uBqo	Zahid Khan	United Oil & Gas, UK	-	Energy	Yes	-	16/08/2023
3	0015j000017uBqp	Zahid Khan	United Oil & Gas, Singapore	-	Energy	Yes	-	16/08/2023
4	0015j000017uBqg	Zahid Khan	Edge Communications	₹13,90,00,000	Electronics	Yes	Hot	16/08/2023
5	0015j000017uBqi	Zahid Khan	Pyramid Construction Inc.	₹95,00,00,000	Construction	Yes	-	16/08/2023
6	0015j000017uBqj	Zahid Khan	Dickenson plc	₹5,00,00,000	Consulting	Yes	-	16/08/2023
7	0015j000017uBqk	Zahid Khan	Grand Hotels & Resorts Ltd	₹50,00,00,000	Hospitality	Yes	Warm	16/08/2023
8	0015j000017uBqm	Zahid Khan	Express Logistics and Transport	₹95,00,00,000	Transportation	Yes	Cold	16/08/2023
9	0015j000017uBqn	Zahid Khan	University of Arizona	-	Education	Yes	Warm	16/08/2023
10	0015j000017uBqj	Zahid Khan	United Oil & Gas Corp.	₹5,60,00,00,000	Energy	Yes	Hot	16/08/2023
11				₹8,21,90,00,000				

- As we know cross filter work with and without child object. For example, in below image we have records of account then need to select with or without and lastly secondary object (child object). For example, we are selecting with and secondary object opportunities. It means that only those reports will be shown which contain opportunities. If we select without so its show reports of account which does not contain opportunities.

I. with

The screenshot shows a Salesforce report interface. On the left, there's a sidebar with 'Fields' and 'Cross Filters'. Under 'Fields', there are filters for 'All accounts', 'Created Date All Time', and 'Active equals Yes'. Under 'Cross Filters', there's a 'New Cross Filter' button. The main area is titled 'REPORT' and shows a table of account data. A modal window titled 'Edit Filter' is open, with the 'Show Me' section set to 'Accounts' and 'with'. The 'Secondary Object' dropdown is set to 'Opportunities'. The 'Apply' button is highlighted with a red box.

Account ID	Account Owner	Account Name	Annual Revenue	Industry	Active	Rating	Last Modified Date
1 0015j000017uBqq	Zahid Khan	GenePoint	₹3,00,00,000	Biotechnology	Yes	Cold	16/08/2023
2 0015j000017uBqo	Zahid Khan	United Oil & Gas, UK	-	Energy	Yes	-	16/08/2023
		United Oil & Gas, Singapore	-	Energy	Yes	-	16/08/2023
		Communications	₹13,90,00,000	Electronics	Yes	Hot	16/08/2023
		Pyramid Construction Inc.	₹95,00,00,000	Construction	Yes	-	16/08/2023
		Dickenson plc	₹5,00,00,000	Consulting	Yes	-	16/08/2023
		Grand Hotels & Resorts Ltd	₹50,00,00,000	Hospitality	Yes	Warm	16/08/2023
		Express Logistics and Transport	₹95,00,00,000	Transportation	Yes	Cold	16/08/2023
		University of Arizona	-	Education	Yes	Warm	16/08/2023
		United Oil & Gas Corp.	₹5,60,00,00,000	Energy	Yes	Hot	16/08/2023
			₹8,21,90,00,000				

II. Without

This screenshot is similar to the one above, but the 'Secondary Object' dropdown in the 'Edit Filter' dialog is now set to 'without'. The rest of the interface and data table are identical.

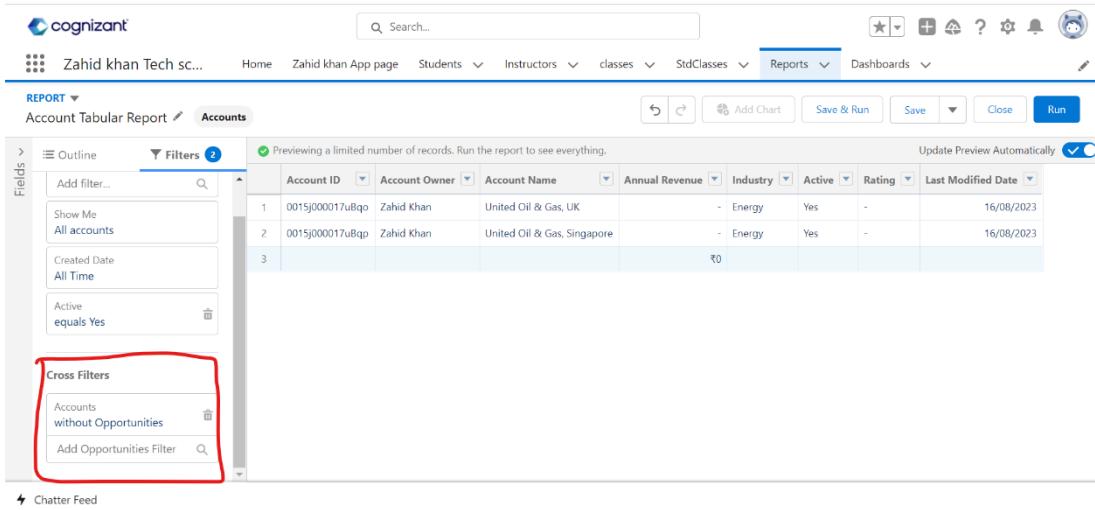
Account ID	Account Owner	Account Name	Annual Revenue	Industry	Active	Rating	Last Modified Date
1 0015j000017uBqq	Zahid Khan	GenePoint	₹3,00,00,000	Biotechnology	Yes	Cold	16/08/2023
2 0015j000017uBqo	Zahid Khan	United Oil & Gas, UK	-	Energy	Yes	-	16/08/2023
		United Oil & Gas, Singapore	-	Energy	Yes	-	16/08/2023
		Communications	₹13,90,00,000	Electronics	Yes	Hot	16/08/2023
		Pyramid Construction Inc.	₹95,00,00,000	Construction	Yes	-	16/08/2023
		Dickenson plc	₹5,00,00,000	Consulting	Yes	-	16/08/2023
		Grand Hotels & Resorts Ltd	₹50,00,00,000	Hospitality	Yes	Warm	16/08/2023
		Express Logistics and Transport	₹95,00,00,000	Transportation	Yes	Cold	16/08/2023
		University of Arizona	-	Education	Yes	Warm	16/08/2023
		United Oil & Gas Corp.	₹5,60,00,00,000	Energy	Yes	Hot	16/08/2023
			₹8,21,90,00,000				

- With opportunities (child object).

This screenshot shows a different approach to filtering. In the 'Fields' sidebar, under 'Cross Filters', there's a 'New Cross Filter' button and a 'Cross Filters' section with a red box around it. The 'Cross Filters' section contains a dropdown menu with 'Accounts with Opportunities' selected. The main report area and data table are identical to the previous screenshots.

Account ID	Account Owner	Account Name	Annual Revenue	Industry	Active	Rating	Last Modified Date
1 0015j000017uBqq	Zahid Khan	GenePoint	₹3,00,00,000	Biotechnology	Yes	Cold	16/08/2023
2 0015j000017uBqg	Zahid Khan	Edge Communications	₹13,90,00,000	Electronics	Yes	Hot	16/08/2023
3 0015j000017uBqi	Zahid Khan	Pyramid Construction Inc.	₹95,00,00,000	Construction	Yes	-	16/08/2023
4 0015j000017uBqj	Zahid Khan	Dickenson plc	₹5,00,00,000	Consulting	Yes	-	16/08/2023
5 0015j000017uBqk	Zahid Khan	Grand Hotels & Resorts Ltd	₹50,00,00,000	Hospitality	Yes	Warm	16/08/2023
6 0015j000017uBqm	Zahid Khan	Express Logistics and Transport	₹95,00,00,000	Transportation	Yes	Cold	16/08/2023
7 0015j000017uBqn	Zahid Khan	University of Arizona	-	Education	Yes	Warm	16/08/2023
8 0015j000017uBql	Zahid Khan	United Oil & Gas Corp.	₹5,60,00,00,000	Energy	Yes	Hot	16/08/2023
9			₹8,21,90,00,000				

- Without opportunities (child object).



The screenshot shows a Salesforce report titled "Account Tabular Report" for the "Accounts" object. The report interface includes a top navigation bar with links like Home, Zahid khan App page, Students, Instructors, classes, StdClasses, Reports, and Dashboards. Below the navigation is a toolbar with icons for Save & Run, Save, Close, and Run.

The main area is divided into two sections: "Fields" on the left and the report preview on the right. The "Fields" section contains a sidebar with filter options. A red box highlights the "Cross Filters" section, which includes a filter for "Accounts without Opportunities".

The report preview shows a table with columns: Account ID, Account Owner, Account Name, Annual Revenue, Industry, Active, Rating, and Last Modified Date. There are three rows of data:

	Account ID	Account Owner	Account Name	Annual Revenue	Industry	Active	Rating	Last Modified Date
1	0015j000017uBqo	Zahid Khan	United Oil & Gas, UK	-	Energy	Yes	-	16/08/2023
2	0015j000017uBqp	Zahid Khan	United Oil & Gas, Singapore	-	Energy	Yes	-	16/08/2023
3				₹0				

A note at the top of the preview area says: "Previewing a limited number of records. Run the report to see everything." There is also a checkbox for "Update Preview Automatically" which is checked.

Summary report

- Summary reports only based on Row and column.

Steps to create summary reports:

- Go to App front-end and click on reports tab after that click on new report.

The screenshot shows the app's navigation bar with 'cognizant' logo, search bar, and various menu items like Home, Students, Instructors, classes, StdClasses, Reports (which has a red box around it), and Dashboards. Below the navigation is a 'Reports' section titled 'Recent' with two items: 'Account Tabular Report' and 'Sample Flow Report: Screen Flows'. On the left, there's a sidebar with categories: 'REPORTS' (Recent, Created by Me, Private Reports, Public Reports, All Reports), 'FOLDERS' (All Folders, Created by Me, Shared with Me), and a 'Chatter Feed' section.

- Now click on All from left side menu and search for Report type. For example, here we are making summary reports of opportunities record type. After that click on start report.

The screenshot shows the 'Create Report' dialog box. On the left, under 'Category', 'All' is selected (highlighted with a red box). In the center, the 'Select a Report Type' section shows a search bar with 'opp' and a list of report types: Opportunities, Opportunities with Products, Opportunities with Contact Roles, Opportunities with Partners, and Opportunities with Competitors. On the right, the 'Details' section shows 'Opportunities' as the report type (highlighted with a red box) and a 'Start Report' button (also highlighted with a red box).

- Now summary report is based on grouping, so we have to focused on Group session. We can group the report using any column in our reports using **add group** search box.

REPORT ▾ New Opportunities Report ▾ Opportunities

Owner Role	Opportunity Owner	Account Name	Opportunity Name	Stage	Fiscal Period	Amount
-	Zahid Khan	United Oil & Gas Corp.	United Oil Plant Standby Generators	Needs Analysis	Q1-2015	₹6.75.000.00
-	Zahid Khan	United Oil & Gas Corp.	United Oil Refinery Generators	Closed Won	Q2-2015	₹9.15.000.00
-	Zahid Khan	Grand Hotels & Resorts Ltd	Grand Hotels Emergency Generators	Closed Won	Q2-2015	₹2.10.000.00
-	Zahid Khan	Grand Hotels & Resorts Ltd	Grand Hotels Generator Installations	Closed Won	Q2-2015	₹3.50.000.00
-	Zahid Khan	United Oil & Gas Corp.	United Oil Refinery Generators	Proposal/Price Quote	Q2-2015	₹2.70.000.00
-	Zahid Khan	United Oil SLA	United Oil SLA	Closed Won	Q2-2015	₹1.20.000.00
-	Zahid Khan	United Oil & Gas Corp.	United Oil Standby Generators	Closed Won	Q2-2015	₹1.20.000.00
-	Zahid Khan	GenePoint	GenePoint Lab Generators	Id. Decision Makers	Q2-2015	₹60.000.00
-	Zahid Khan	GenePoint	GenePoint SLA	Closed Won	Q2-2015	₹30.000.00
-	Zahid Khan	Grand Hotels & Resorts Ltd	Grand Hotels Guest Portable Generators	Value Proposition	Q2-2015	₹2.50.000.00
-	Zahid Khan	Erida Communications	Erida Emergency Generator	Closed Won	Q2-2015	₹75.000.00

- before apply grouping go to filters and change the Close date to All time so that we can see all the records. And click on apply. Now we got all records.

REPORT ▾ New Opportunities Report ▾ Opportunities

Owner Role	Opportunity Owner	Account Name	Opportunity Name	Stage	Fiscal Period	Amount
United Oil & Gas Corp.	United Oil Refinery Generators	United Oil SLA	United Oil Standby Generators	Closed Won	Q2-2015	₹9.15.000.00
Hotels & Resorts Ltd	Grand Hotels Emergency Generators	GenePoint Lab Generators	GenePoint SLA	Closed Won	Q2-2015	₹2.10.000.00
Hotels & Resorts Ltd	Grand Hotels Generator Installations	GenePoint Lab Generators	GenePoint SLA	Closed Won	Q2-2015	₹3.50.000.00
Oil & Gas Corp.	United Oil Refinery Generators	GenePoint Lab Generators	GenePoint SLA	Closed Won	Q2-2015	₹2.70.000.00
Oil & Gas Corp.	United Oil SLA	GenePoint SLA	GenePoint SLA	Closed Won	Q2-2015	₹1.20.000.00
Oil & Gas Corp.	United Oil Standby Generators	GenePoint SLA	GenePoint SLA	Closed Won	Q2-2015	₹1.20.000.00
GenePoint	Grand Hotels Guest Portable Generators	Edge Emergency Generator	Edge Emergency Generator	Closed Won	Q2-2015	₹2.50.000.00
GenePoint	Edge Emergency Generator	Edge Emergency Generator	Edge Emergency Generator	Closed Won	Q2-2015	₹75.000.00
Erida Communications	Erida Emergency Generator	Erida Emergency Generator	Erida Emergency Generator	Closed Won	Q2-2015	₹35.000.00

- After that we can apply grouping in summary reports using **Groups** session. For example, we are using **Account name** for group reports.

REPORT ▾ New Opportunities Report ▾ Opportunities

Owner Role	Opportunity Owner	Account Name	Opportunity Name	Stage	Fiscal Period	Amount
-	Zahid Khan	Edge Communications	Edge Emergency Generator	Closed Won	Q2-2015	₹
-	Zahid Khan	Edge Communications	Edge Installation	Closed Won	Q1-2015	₹
-	Zahid Khan	Edge Communications	Edge SLA	Closed Won	Q1-2015	₹
-	Zahid Khan	Edge Communications	Edge Emergency Generator	Id. Decision Makers	Q2-2015	₹
-	Zahid Khan	Burlington Textiles Corp of America	Burlington Textiles Weaving Plant Generator	Closed Won	Q1-2015	₹
-	Zahid Khan	Pyramid Construction Inc.	Pyramid Emergency Generators	Prospecting	Q1-2015	₹
-	Zahid Khan	Dickenson plc	Dickenson Mobile Generators	Qualification	Q1-2015	₹
-	Zahid Khan	Grand Hotels & Resorts Ltd	Grand Hotels Kitchen Generator	Id. Decision Makers	Q1-2015	₹
-	Zahid Khan	Grand Hotels & Resorts Ltd	Grand Hotels Guest Portable Generators	Value Proposition	Q2-2015	₹
-	Zahid Khan	Grand Hotels & Resorts Ltd	Grand Hotels Generator Installations	Closed Won	Q2-2015	₹
-	Zahid Khan	Grand Hotels & Resorts Ltd	Grand Hotels SLA	Closed Won	Q1-2015	₹

- After grouping in summary reports using account name, we will see the multiple reports for one account name instead of repeating the account name for all

Account Name	Owner Role	Opportunity Owner	Opportunity Name	Stage	Fiscal Period	Amount
Burlington Textiles Corp of America (1)	Zahid Khan	Burlington Textiles	Weaving Plant Generator	Closed Won	Q1-2015	₹2,35,000.00
Dickenson plc (1)	Zahid Khan	Dickenson	Mobile Generators	Qualification	Q1-2015	₹15,000.00
Edge Communications (4)	Zahid Khan	Edge	Emergency Generator	Closed Won	Q2-2015	₹75,000.00
	Zahid Khan	Edge	Installation	Closed Won	Q1-2015	₹50,000.00
	Zahid Khan	Edge	SLA	Closed Won	Q1-2015	₹60,000.00
	Zahid Khan	Edge	Emergency Generator	Id. Decision Makers	Q2-2015	₹35,000.00
Grand Hotels & Resorts Ltd (5)	Zahid Khan	Grand Hotels	Kitchen Generator	Id. Decision Makers	Q1-2015	₹15,000.00

records.

- Amount column in reports is not showing subtotal correctly so remove the amount and enter again by searching amount in column section and add it. After that we will see amount subtotal.
- We can also see the **Add chart** option which is not available in tabular reports.
- At bottom of the reports, we have options subtotal and grand total toggle button. If we want this, then we can on it or disable.

Account Name	Age	Close Date	Created Date	Next Step	Lead Source	Type	Amount	
Burlington Textiles Corp of America (1)	00%	0	18/06/2023	16/08/2023	-	Web	New Customer	₹2,35,000.00
Dickenson plc (1)	10%	34	25/06/2023	16/08/2023	-	Purchased List	New Customer	₹15,000.00
Edge Communications (4)	00%	0	12/08/2023	16/08/2023	-	Word of mouth	New Customer	₹75,000.00
	00%	0	03/06/2023	16/08/2023	-	Word of mouth	Existing Customer - Upgrade	₹50,000.00
	00%	0	29/04/2023	16/08/2023	-	Word of mouth	Existing Customer - Upgrade	₹60,000.00
	60%	34	18/08/2023	16/08/2023	-	-	Existing Customer - Replacement	₹35,000.00
Grand Hotels & Resorts Ltd (5)	00%	0	15/05/2023	16/08/2023	-	-	Eviction Customer - Unwante	₹2,20,000.00

- Rest of things are same as tabular reports we can apply all 4 types of filters using filter section from left hand side.
- In filter section, we will not see the add logic filter because we are not applying any custom filter. After applying we are able to apply the logic filter. We have one more option in filter to limit the row.

- After making reports now save the reports by creating a folder same as tabular reports name the folder as Summary reports. All the summary reports we can save inside this folder.

-

- Now we are applying Field specific filter (custom filter). For apply custom filter we have to search field from **Add filter**. For example, we are making custom filter for **Account name is not Null** and **Stage is not closed lost**. So that reports will show only those data which satisfy these criteria.

The screenshot shows the Opportunities summary Report page. In the 'Filters' section, two custom filters have been added:

- Account Name** not equal to null
- Stage** not equal to Closed Lost

The report preview shows several rows of data matching these filters.

Account Name	Owner Role	Opportunity Owner	Opportunity Name	Stage	Fiscal Period	Probab
Express Logistics and Transport (2)	-	Zahid Khan	Express Logistics SLA	Perception Analysis	Q1-2015	
	-	Zahid Khan	Express Logistics Standby Generator	Closed Won	Q1-2015	
GenePoint (1)	-	Zahid Khan	GenePoint Standby Generator	Closed Won	Q1-2015	
Grand Hotels & Resorts Ltd (4)	-	Zahid Khan	Grand Hotels Generator Installations	Closed Won	Q2-2015	
	-	Zahid Khan	Grand Hotels SLA	Closed Won	Q1-2015	
	-	Zahid Khan	Grand Hotels Emergency Generators	Closed Won	Q2-2015	
	-	Zahid Khan	Grand Hotels Kitchen Generator	I4 Daricinn Makare	Q1-2015	

- Now after applying custom filter, we are able to see the Add logic filter option. For example, we are going to add logic filter like Account Name and Stage should be True. So, we are going to add AND operation. This is how we can apply logic filter.
- in same way we can apply cross filter like tabular reports.
- Now to save the records click on save.

The screenshot shows the Opportunities summary Report page. In the 'Filters' section, a logic filter has been added:

INCLUDE ROWS MATCHING
1 AND 2

1. **Account Name** not equal to null

2. **Stage** not equal to Closed Lost

The report preview shows several rows of data matching these filters.

Account Name	Owner Role	Opportunity Owner	Opportunity Name	Stage	Fiscal Period	Probab
Express Logistics and Transport (2)	-	Zahid Khan	Express Logistics SLA	Perception Analysis	Q1-2015	
	-	Zahid Khan	Express Logistics Standby Generator	Closed Won	Q1-2015	
GenePoint (1)	-	Zahid Khan	GenePoint Standby Generator	Closed Won	Q1-2015	
Grand Hotels & Resorts Ltd (4)	-	Zahid Khan	Grand Hotels Generator Installations	Closed Won	Q2-2015	
	-	Zahid Khan	Grand Hotels SLA	Closed Won	Q1-2015	
	-	Zahid Khan	Grand Hotels Emergency Generators	Closed Won	Q2-2015	
	-	Zahid Khan	Grand Hotels Kitchen Generator	I4 Daricinn Makare	Q1-2015	

Steps to Add chart in summary Reports:

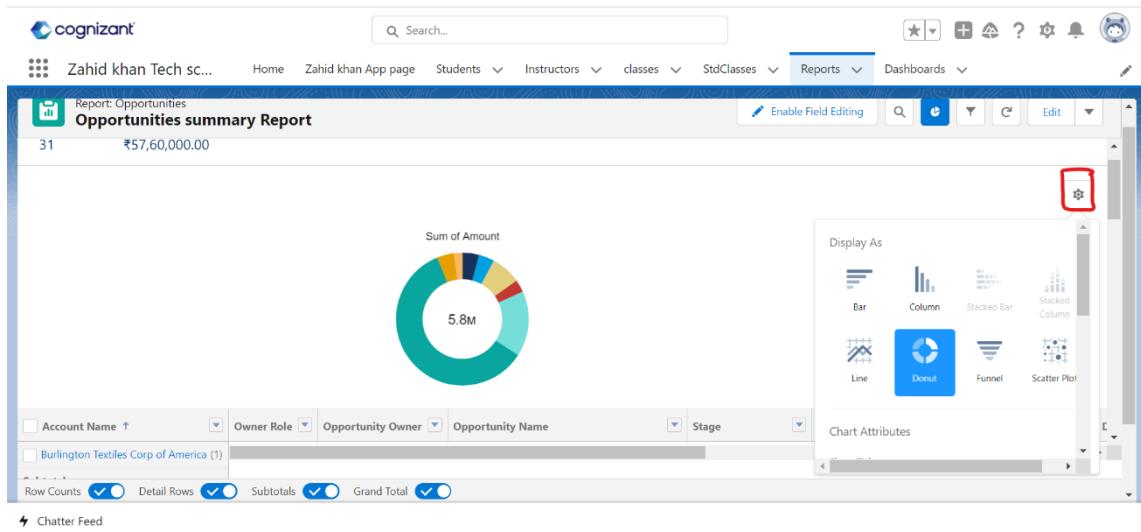
- As we know that we can add chart in summary and matrix reports only.
- For adding chart in summary report. Open the records from summary folder in which you want to add chart. And click on Add chart.

The screenshot shows a Cognizant CRM interface. At the top, there's a navigation bar with links like Home, Students, Instructors, classes, StdClasses, Reports, and Dashboards. Below the navigation is a search bar and a toolbar with various icons. The main content area is titled 'Report: Opportunities Opportunities summary Report'. It displays a table of opportunities with columns for Account Name, Owner Role, Opportunity Owner, Opportunity Name, Stage, Fiscal Period, Probability (%), Age, and Close Date. A total record count of 31 and a total amount of ₹57,60,000.00 are shown at the top left. At the top right of the table, there's a 'Add Chart' button, which is highlighted with a red box. Below the table, there are filtering options for Row Counts, Detail Rows, Subtotals, and Grand Total.

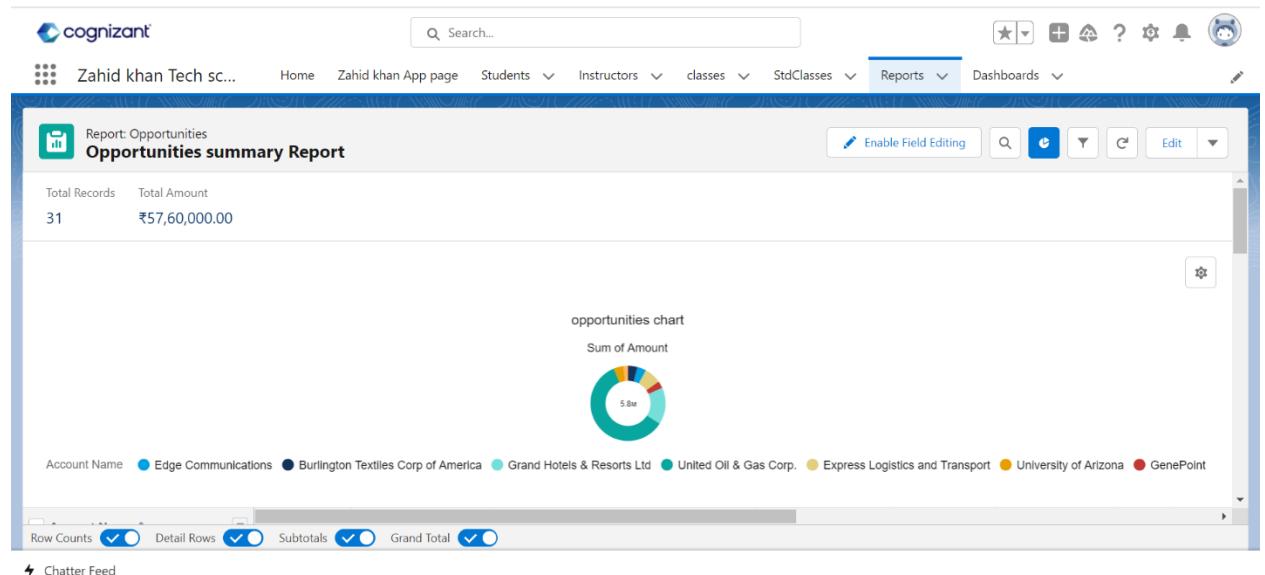
- After clicking on Add chart we will see the chart will appear on the page along with reports.

This screenshot shows the same Opportunities summary Report page after a chart has been added. The chart, titled 'Sum of Amount', is a horizontal bar chart where the x-axis represents the amount in millions (0 to 3.6M) and the y-axis lists account names. The bars show the total amount for each account: Burlington Textiles Corp of America (~3.4M), United Oil & Gas Corp. (~3.3M), Grand Hotels & Resorts Ltd (~1.8M), Express Logistics and Transport (~1.2M), GenePoint (~0.8M), Edge Communications (~0.6M), Dickenson plc (~0.3M), and Burlington Textiles Weaving Plant Generator (~0.2M). The rest of the page remains the same, including the table below the chart and the original navigation and search bars.

- By clicking on setting icon on chart we will add different types of charts.



- Inside this setting icon we have an options chart attribute. In which we add chart title, value, sliced by, and legend position to right and bottom. We can adjust these based on project requirements.
- Now click on save to save the reports with chart. After that click on run to see the results.



Matrix reports

- Matrix reports based on Rows and column.

Steps to create matrix reports:

- Go to App front-end and click on reports tab after that click on new report.

The screenshot shows the app's navigation bar with 'cognizant' logo, search bar, and various tabs like Home, Students, Instructors, classes, StdClasses, Reports (which has a red box around it), and Dashboards. Below the navigation is a 'Reports' section with a 'Recent' tab and a table of recent reports. A sidebar on the left lists categories: REPORTS (Recent, Created by Me, Private Reports, Public Reports, All Reports), FOLDERS (All Folders, Created by Me, Shared with Me). At the bottom is a 'Chatter Feed' section.

- After that click on all and search for report type. Here we are choosing opportunities for report type. After that click on start reports.

The screenshot shows the 'Create Report' dialog box. On the left, there's a sidebar with 'Category' sections: Recently Used, All (highlighted with a red box), Accounts & Contacts, Opportunities, Customer Support Reports, and Leads. The main area is titled 'Select a Report Type' with a search bar containing 'opp'. It lists report types: Opportunities (highlighted with a red box), Opportunities with Products, Opportunities with Contact Roles, Opportunities with Partners, and Opportunities with Competitors. To the right is a 'Details' panel for the 'Opportunities' report type, which includes a 'Start Report' button (highlighted with a red box) and sections for 'Details' and 'Fields (118)'.

- After that go to filter and in close date choose All time to show that all data in reports.
- Now go to outline and add group rows by entering Add group name in Group session. For example, we are group row using **Stage**. So, the reports is grouping using stage.

- After adding group row, we have to add group column inside group session to create matrix reports. For example, we are entering lead source.
- Now save the reports in matrix folder by creating it and run the report. This is how matrix report look like.

- By clicking on cell of Stage we can see the related reports details.

Steps to create chart in matrix Reports:

- We can add chart for matrix report same as summary report.
- Open the reports from matrix folder and click on edit. After that click on Add chart option on top

This screenshot shows the 'Opportunities matrix Report' page in a CRM system. The top navigation bar includes 'Home', 'Zahid khan App page', 'Students', 'Instructors', 'classes', 'StdClasses', 'Reports', 'Dashboards'. Below the navigation is a search bar and a toolbar with icons for 'Save & Run', 'Save', 'Close', and 'Run'. A red box highlights the 'Add Chart' button in the toolbar. The main area displays a matrix table with columns for Stage, Lead Source, Web, Phone Inquiry, Purchased List, Word of mouth, Employee Referral, External Referral, Partner, and Total. The rows represent different opportunity stages: Prospecting, Qualification, Value Proposition, Id. Decision Makers, and Proposal/Price Quote. A detailed view of the first row is shown below the main table, listing specific opportunities with columns for Owner Role, Opportunity Owner, Account Name, Opportunity Name, Fiscal Period, Expected Revenue, Probability (%), Age, Close Date, and Create. The bottom of the page includes a 'Details (20 Rows)' section and various filtering and sorting options.

- By click on setting icon beside chart we can add any chart. Inside this we have same option as summary chart title, value, sliced by Stage or Lead source because we have both in reports and legend position.
- Matrix chart will show beside the matrix reports. Now save the records and click on Run.

This screenshot shows the same 'Opportunities matrix Report' page after adding a chart. A red box highlights the chart area in the top right corner. The chart is titled 'Opportunities chart' and shows a single data point with a value of '4.1M'. Below the chart is a legend with five categories: 'Closed Won' (blue), 'Negotiation/Review' (black), 'Proposal/Price Quote' (green), 'Value Proposition' (teal), and 'Other' (yellow). The rest of the page structure is identical to the previous screenshot, including the matrix table and detailed view.

- We can add anything related to chart using this setting icon.

Day-09

Reports on custom object

- To make reports on custom object we have to understand about reports type.
- We have to enable reports type in custom object.

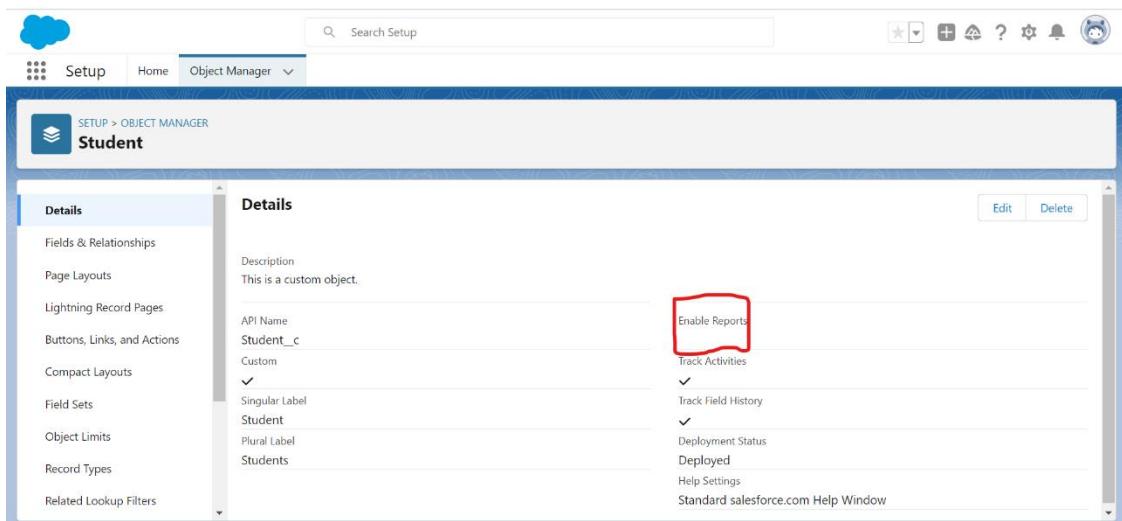
Report types

- Report type is like a template for reports.
- Report type determines which fields and records are available for use, when one is creating a report.
- This is based on relationships between a primary object and its related objects.
- For example, account with contact report type, account is primary report and contact as related object.
- Reports display those record that meet the criteria defined in report types.
- For example, when we create new report and searching for record type of custom object so it will not available because report types of custom object is not active.
- While creating report we got 2 options.
 1. Primary object with related objects.
 2. Primary object with or without related object.

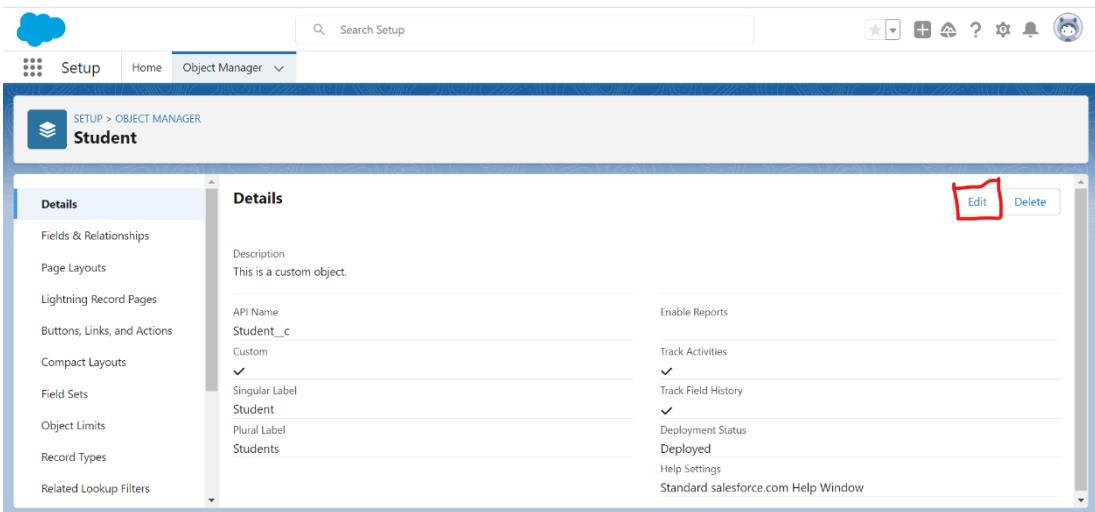
Steps to enable reports custom object:

Before making reports on custom object, we have to **enable reports** on that object. For example: we are enabling reports of student object.

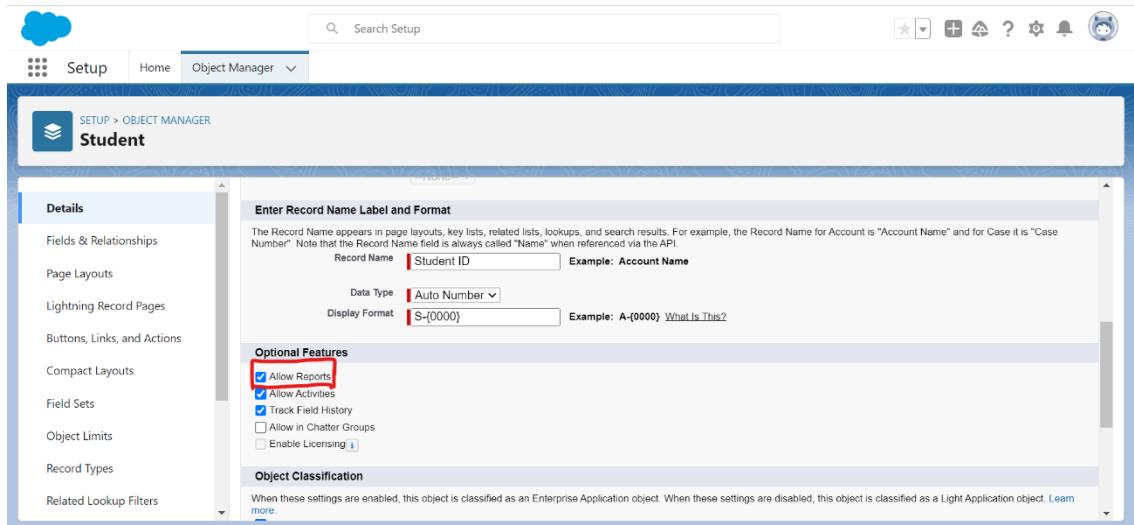
- Go to setup and click on object manager after that search for student object (custom object). And open student object. We will see in detail that **Enable reports** is not active, so we need to active this.



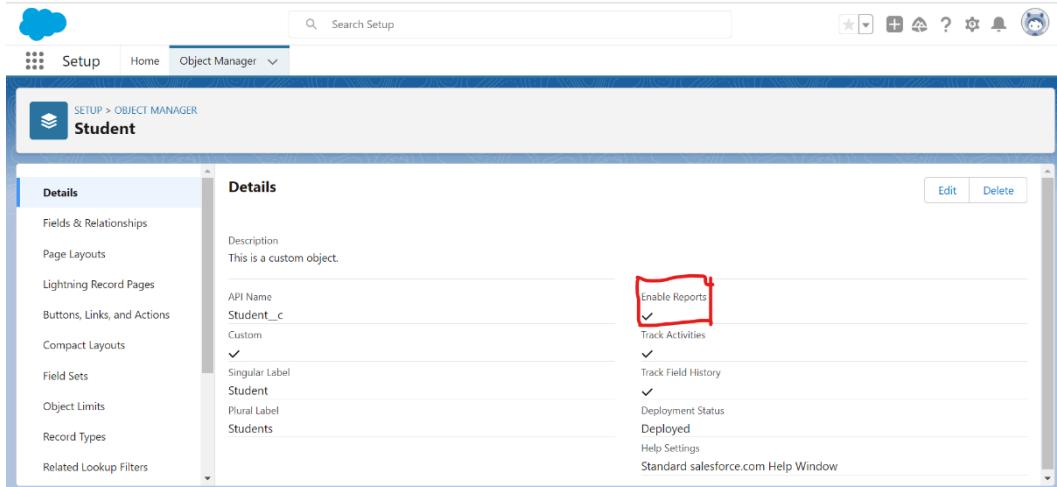
- For active enable reports click on Edit.



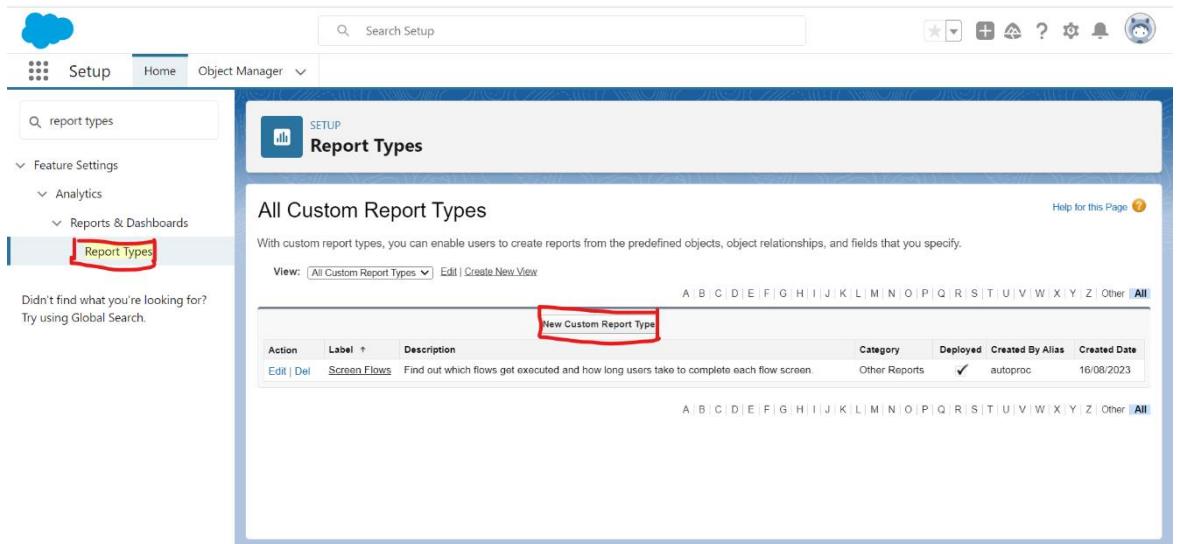
- In optional features select **Enable report** option. And click on save.



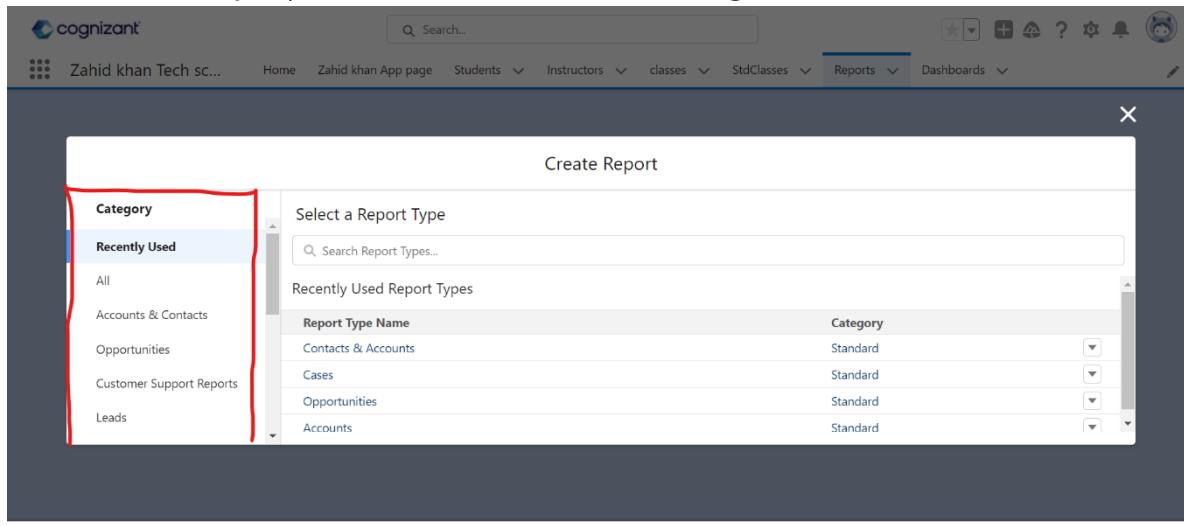
- Now click on details page we will see that Enable report option is active now.



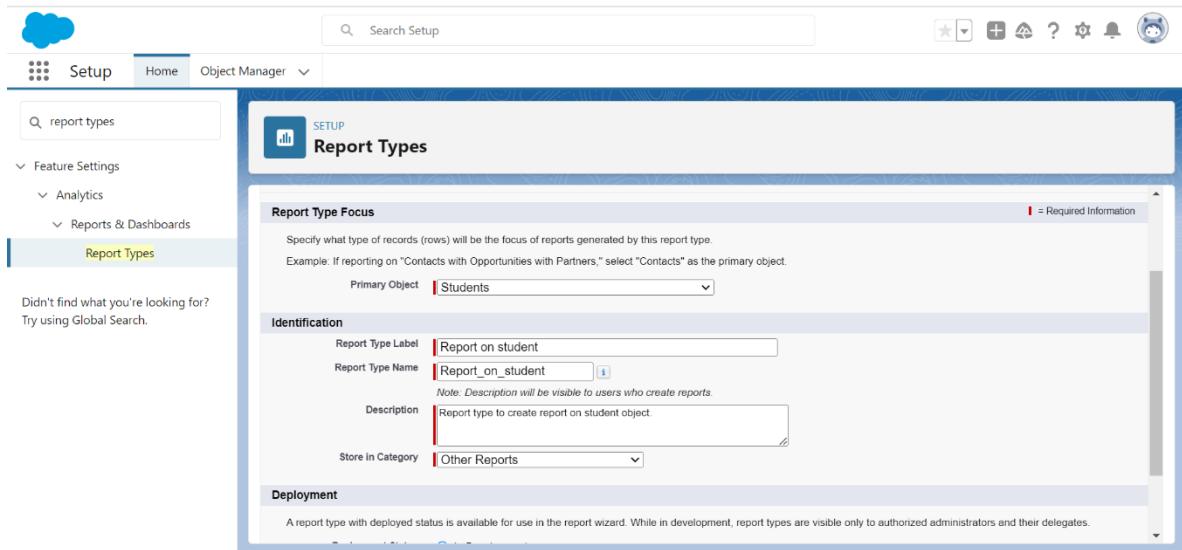
- now go to Home and search **Report Types** in Quick search box. After that click on Report Types. After that click on New Custom Report Types.



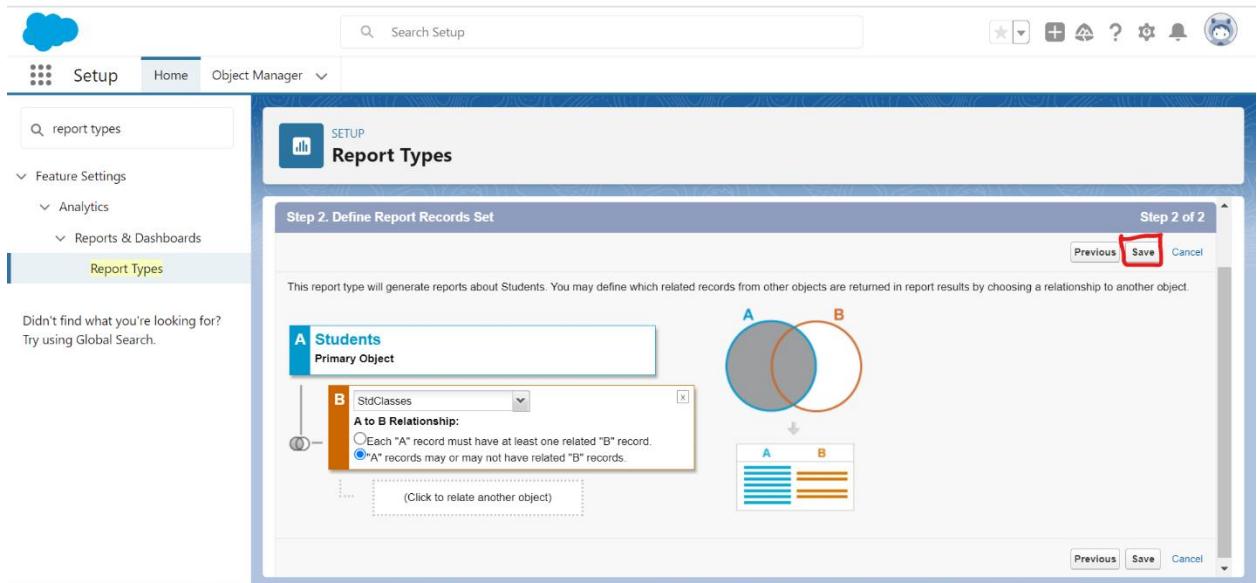
- After that we got 3 options **Report type focus, Identification, and deployment**.
 - In Report Type focus we have to select the object (i.e., student object) for which we want to create report from primary object drop down.
 - In identification enter Report type label, report type name, description, and store in category. Store in category means we have to select the category in which the custom object (i.e., student object) will store as show in below image. Here we select



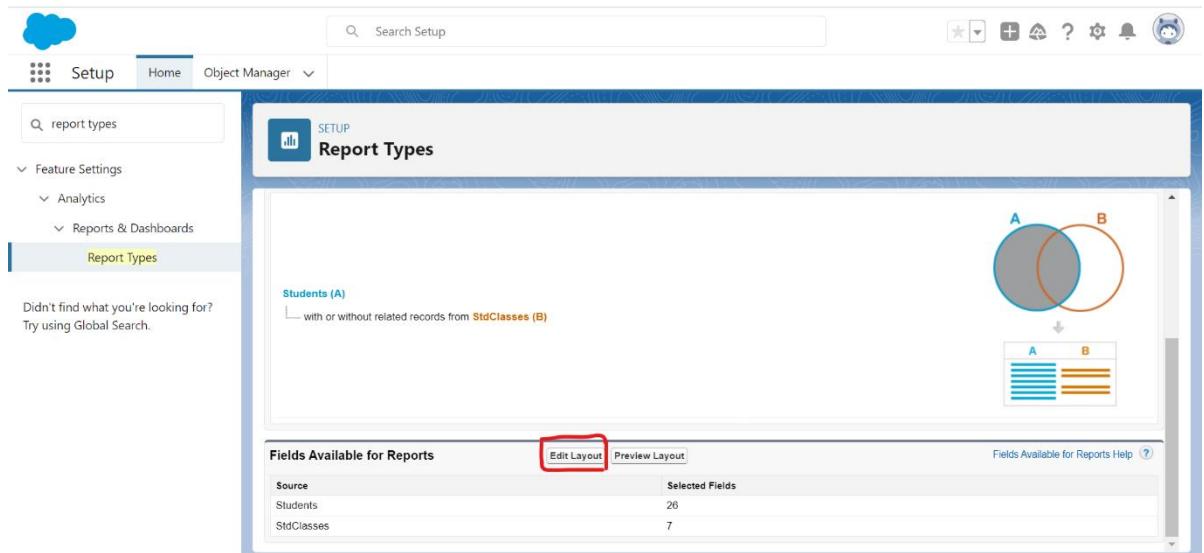
- other reports.
- In development we have to select development or deployed. Here we are selecting development.



- now click on next. On next page we got define report records set. Which means **This report type will generate reports about Students. You may define which related records from other objects are returned in report results by choosing a relationship to another object.** In below image A is primary object and B is a secondary object. In B object we got 2 options, 1st Each A record must have at least one related B record. 2nd A record may or may not have related B record.
- Here we are selecting stdClassses as B object and select 2nd option. So all students record will available in reports. After that click on save.



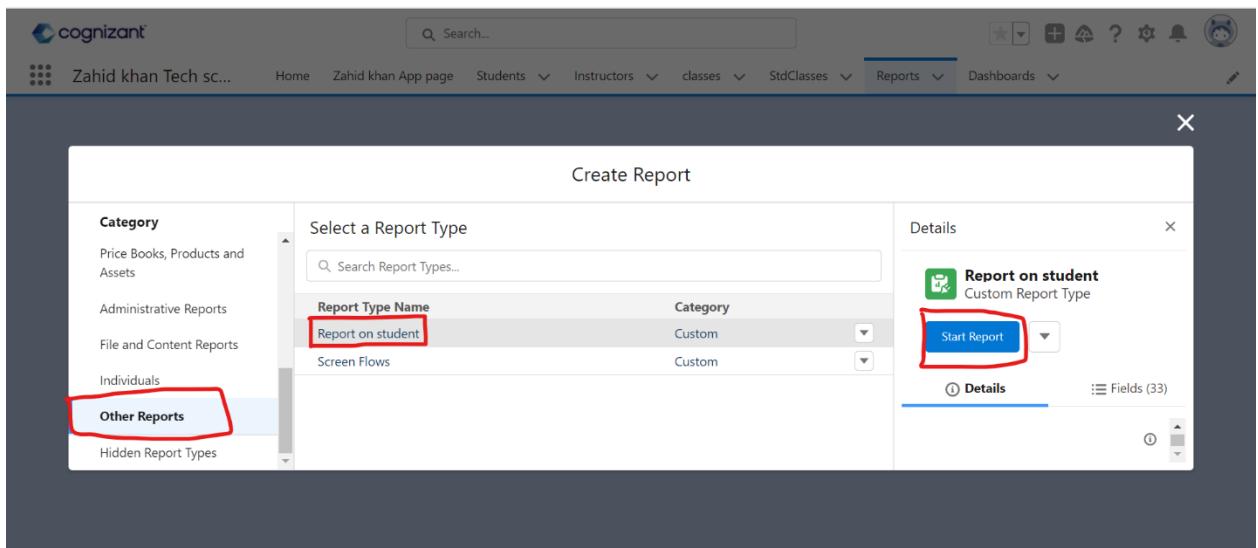
- After saving the page we will see how many fields in student object and in stdClasses object. If we want to add or remove any field, click on edit layout.



- on edit layout page we can see all the field if we want to remove or add any field so we can do in this page. We have edit properties button. By using this we can edit the name of any field.
- Now report types of student object (custom object) is created.
- Go to front-end and click on Report tab and click on New Report.

Report Name	Description	Folder	Created By	Created On	Subscribed
Contacts & Accounts summary Report		Summary Reports	Zahid Khan	20/9/2023, 12:52 pm	
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	16/8/2023, 4:14 pm	
Contacts & Accounts summary Report		Private Reports	Zahid Khan	20/9/2023, 12:52 pm	
Cases tabular Report		Tabular Reports	Zahid Khan	20/9/2023, 12:47 pm	
Opportunities matrix Report		Matrix Reports	Zahid Khan	19/9/2023, 10:44 pm	
Opportunities summary Report		Summary Reports	Zahid Khan	19/9/2023, 9:53 pm	

- After that click on other reports in category because we are saving student object in other category.
- Now we will see our custom report type name inside the other category.
- Now click on Report on student and click on start Report same as standard object records.



- Here we are creating tabular report for student object. Now add field from column section.

	Student ID	StdClass records	Name	Father Name	Email	Age	Entrance Score	Salesforce skill set	Salesforce Role
1	S-0010	SC-0004	Md Zahid khan	alfaudin	zahid.k5@gmail.com	25	80.00	Apex	Developer
2	S-0010	SC-0005	Md Zahid khan	alfaudin	zahid.k5@gmail.com	25	80.00	Apex	Developer
3	S-0017	-	khan	-	khan@gmail.com	-	-	-	-
4	S-0011	-	Ahmad	-	-	24	90.00	Report	Admin
5	S-0012	-	Shahid	-	-	28	-	Apex	Developer
6	S-0013	-	Rahul	-	-	24	-	Report	Business Analyst
7	S-0014	-	anam	-	-	17	-	-	-
8							118	170.00	

- We can apply all 4 types filter same as standard object report. Now click on save and save the report in tabular report folder which is created during standard object report creation. After that click on Run.
- Like standard object report we can create all 4 types of records for custom object.

Total Records Total Age Total Entrance Score
7 118 170.00

	Student ID	StdClass records	Name	Father Name	Email	Age	Entrance Score	Salesforce skill set	Salesforce Role	Record Type
1	S-0010	SC-0004	Md Zahid khan	allaudin	zahid.k5@gmail.com	25	80.00	Apex	Developer	Fresher
2	S-0010	SC-0005	Md Zahid khan	allaudin	zahid.k5@gmail.com	25	80.00	Apex	Developer	Fresher
3	S-0014	-	anam	-	-	17	-	-	-	Fresher
4	S-0017	-	khan	-	khan@gmail.com	-	-	-	-	Fresher
5	S-0011	-	Ahmad	-	-	24	90.00	Report	Admin	Fresher
6	S-0012	-	Shahid	-	-	28	-	Apex	Developer	Experienced
7	S-0013	-	Rahul	-	-	24	-	Report	Business Analyst	Experienced
8						118	170.00			

Chatter Feed

Scoping Rule for Filter by scope

- We can see the option Filter by scope in list view filter. And in standard filter of report, we can see the Filter by scope.

Students All

6 items • Sorted by Student ID • Filtered by All students • Updated 24 minutes ago

Student ID ↑	Name	Age
S-0010	Md Zahid khan	25
S-0011	Ahmad	24
S-0012	Shahid	28
S-0013	Rahul	24
S-0014	anam	17
S-0017	khan	

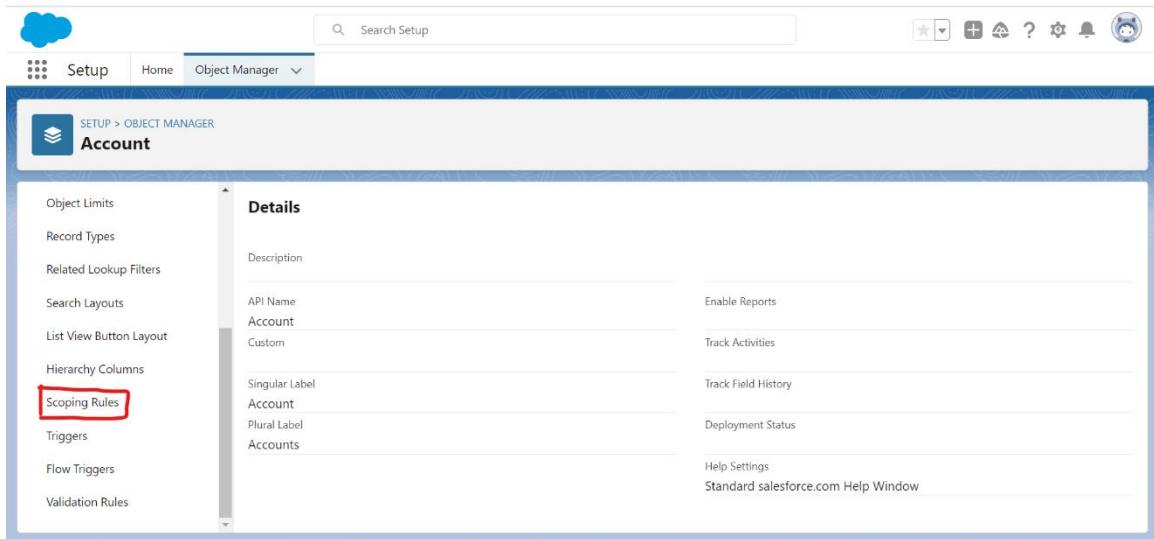
Filter by Owner
 All students
 My students
 Filter by scope
 Queue owned students

Done

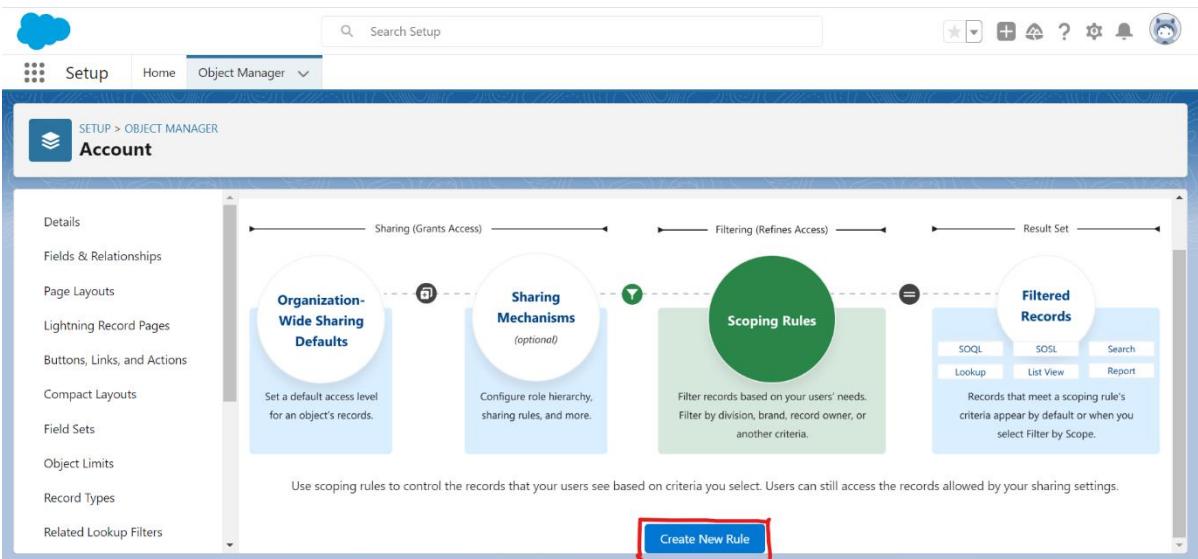
- To use filter by scope we have to set the scoping rule for that object standard or custom object.
- Here we are taking the example of Account object to set scoping Rule. Using we way we can set the scoping rule for all object.

Step to set scoping rule for Account object:

- Go to setup-up click on object manager and search for account object. now click on this and open it.
- After that click on scoping rule from left hand side menu.



- After the click on scoping rule and click on Create new Rule button.



- After that new screen will open in which we got 3 section Rule Details, user criteria, and record criteria.

- I. In Rule details section, we have to enter Rule name, full name, description, and a check box for **Is Active** this check box should be checked if we want to active and if unchecked so its de-activate.
- II. In user criteria, we have 2 option user criteria and permission criteria. we have to choose criteria type as **user criteria** and the field name from the list we can choose any field. Then need to choose **operator**, **Type** and **value** based on requirement. Here we are choosing Active, operators as **Equal**, type **Boolean**, and value is **True**.
- III. Next is record criteria, choose criteria type is **Record Field**, next choose any field from that object in which we want to add criteria, then operators, type, and value. In Type we have 2 option **picklist** and **field reference**. Here we are choosing **Active** in Field, Type is **picklist** and value is **Yes**.

The first screenshot shows the 'Rule Detail' section of the 'Account Scoping Rules' configuration. It includes fields for Rule Name (Test), Full Name (Test), Description (Description), and a checked 'IsActive' checkbox. The second screenshot shows the 'User Criteria' section, where a criterion is defined for the \$User.IsActive field using the Equals operator, Boolean type, and True value. A note at the bottom of the criteria section states: 'Design your scoping rules so that one active rule only applies to a given user.'

- Now click on save.

- Now scoping rule is created, if that rule will match then this record will show in filter.

Account Scoping Rules

Scoping rules are available for custom objects and the account, case, contact, event, lead, opportunity, and task standard objects. You can create up to 2 active rules.

1 of 2 active rules, Sorted by Rule Name

Rule Name	Description	Is Active	User Criteria	Record Criteria
Test		✓	\$User.IsActive=true	IS PICKVAL(Active__c, 'Yes')...

- Now go to account report and select the filter by scope option from standard filter. Then only Active Yes field will be visible in report.

REPORT ▾

Account Tabular Report **Accounts**

Fields > Filters 1

Filters

Add filter...

Show Me **Filter by scope**

Created Date All Time

Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

	Account ID	Account Owner	Account Name	Annual Revenue	Industry	Active	Rating	Last Modified Date
1	0015j000017uBqq	Zahid Khan	GenePoint	₹3,00,00,000	Biotechnology	Yes	Cold	16/08/2023
2	0015j000017uBqo	Zahid Khan	United Oil & Gas, UK	-	Energy	Yes	-	16/08/2023
3	0015j000017uBqp	Zahid Khan	United Oil & Gas, Singapore	-	Energy	Yes	-	16/08/2023
4	0015j000017uBqg	Zahid Khan	Edge Communications	₹13,90,00,000	Electronics	Yes	Hot	16/08/2023
5	0015j000017uBqi	Zahid Khan	Pyramid Construction Inc.	₹95,00,00,000	Construction	Yes	-	16/08/2023
6	0015j000017uBqj	Zahid Khan	Dickenson plc	₹5,00,00,000	Consulting	Yes	-	16/08/2023
7	0015j000017uBqk	Zahid Khan	Grand Hotels & Resorts Ltd	₹50,00,00,000	Hospitality	Yes	Warm	16/08/2023
8	0015j000017uBqm	Zahid Khan	Express Logistics and Transport	₹95,00,00,000	Transportation	Yes	Cold	16/08/2023
9	0015j000017uBqn	Zahid Khan	University of Arizona	-	Education	Yes	Warm	16/08/2023
10	0015j000017uBql	Zahid Khan	United Oil & Gas Corp.	₹5,60,00,00,000	Energy	Yes	Hot	16/08/2023
11				₹8,21,90,00,000				

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Joined Report

- This is 4th type of report.

Steps to create Joined Report:

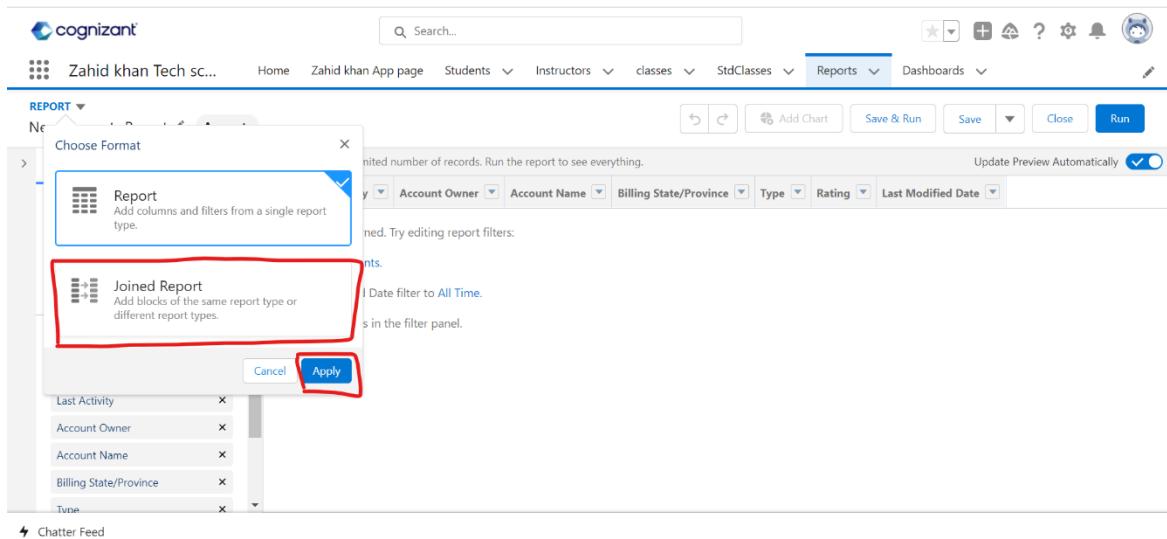
- Go to report tab on front-end and click on report, after that click on new Report.

The screenshot shows the 'Reports' section of a platform. On the left, there's a sidebar with categories like 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', and 'Folders'. The main area displays a table of reports with columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. A red box highlights the 'Reports' dropdown menu at the top right of the page. Another red box highlights the 'New Report' button in the same area.

- After that select Report types, here we are choosing standard object(account). We can make joined report for custom object as well. From custom object report we have to make report type first using above steps.
- After that click on start Report.

The screenshot shows the 'Create Report' dialog box. On the left, there's a sidebar with 'Category' sections like 'Recently Used' (which includes 'All', 'Accounts & Contacts', 'Opportunities', 'Customer Support Reports', and 'Leads') and 'Recently Used Report Types' (which includes 'Contacts & Accounts' and 'Accounts'). A red box highlights the 'Accounts' report type in the list. On the right, there's a 'Details' panel for the 'Accounts' report, which includes fields for 'Standard Report Type' (set to 'Accounts'), 'Start Report' (button highlighted with a red box), 'Details' (tab selected), and 'Created By You'. Another red box highlights the 'Start Report' button in the details panel.

- Now we can see a Report option on top of the screen just click on that and select joined report option. And click on apply. Report option is used to make tabular, summary and matrix reports.



- Now go to filter and apply standard filter. Select show me All account to show all records and created date All time.

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	- Automated Process	Sample Account for Entitlements	-	-	-	-	16/08/2023
2	- Zahid Khan	Edge Communications	TX	Customer - Direct	Hot	Hot	16/08/2023
3	- Zahid Khan	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	Warm	16/08/2023
4	- Zahid Khan	Pyramid Construction Inc.	-	Customer - Channel	-	-	16/08/2023
5	- Zahid Khan	Dickenson plc	KS	Customer - Channel	-	-	16/08/2023
6	- Zahid Khan	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	Warm	16/08/2023
7	- Zahid Khan	Express Logistics and Transport	OR	Customer - Channel	Cold	Cold	16/08/2023
8	- Zahid Khan	University of Arizona	AZ	Customer - Direct	Warm	Warm	16/08/2023
9	- Zahid Khan	United Oil & Gas Corp.	NY	Customer - Direct	Hot	Hot	16/08/2023

- We can apply all types of filters same as another types of report.
- Now click on **Add Block** button beside report name so that we can add another report types. i.e., Opportunities record type.

JOINED REPORT ▾
New Accounts Report Add Block

Fields > Outline Filters

Group Across Blocks

Columns

Accounts block 1

Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
Zahid Khan	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	16/08/2023
Zahid Khan	Express Logistics and Transport	OR	Customer - Channel	Cold	16/08/2023
Zahid Khan	University of Arizona	AZ	Customer - Direct	Warm	16/08/2023
Zahid Khan	United Oil & Gas Corp.	NY	Customer - Direct	Hot	16/08/2023
sForce		CA	-	-	16/08/2023
Zahid Khan	GenePoint	CA	Customer - Channel	Cold	16/08/2023
Zahid Khan	United Oil & Gas, UK	UK	Customer - Direct	-	16/08/2023
Zahid Khan	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	16/08/2023
	Count: 13				

Chatter Feed

- now enter another Report type (i.e., opportunities). And click on Add block.

JOINED REPORT ▾
New Accounts Report Add Block

Fields >

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Account Name

Billing State/Province

Type

Count: 13

Select a Report Type

Recently Used Report Types

Report Type Name	Category
Opportunities	Standard

Details

Opportunities Standard Report Type

Common fields will come from these objects: Account, User.

Include default columns

Add Block

Chatter Feed

- Now we can see both reports on report page.

JOINED REPORT ▾
New Accounts Report Add Block

Fields > Outline Filters

Accounts block 1

Account Name	Billing State/Province	Type	Rating	Last Modified Date	Owner Role	Opportunity Owner
Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	16/08/2023	-	Zahid Khan
Express Logistics and Transport	OR	Customer - Channel	Cold	16/08/2023	-	Zahid Khan
University of Arizona	AZ	Customer - Direct	Warm	16/08/2023	-	Zahid Khan
United Oil & Gas Corp.	NY	Customer - Direct	Hot	16/08/2023	-	Zahid Khan
sForce	CA	-	-	16/08/2023	-	Zahid Khan
GenePoint	CA	Customer - Channel	Cold	16/08/2023	-	Zahid Khan
United Oil & Gas, UK	UK	Customer - Direct	-	16/08/2023	-	Zahid Khan
United Oil & Gas, Singapore	Singapore	Customer - Direct	-	16/08/2023	-	Zahid Khan
	Count: 12					

Opportunities Opportunities block 1

Chatter Feed

- We can apply standard, custom and logic filter on both report types (i.e., account & opportunities).
- Now save the report in joined folder by making it and run the report. We can see the report as shown below.

The screenshot shows a joined report titled "Accounts & opportunities joined Report". The report displays two data blocks side-by-side: "Accounts Accounts block 1" and "Opportunities Opportunities block 1". The "Accounts" block contains 8 rows of account data with columns for Account Name, Billing State/Province, Type, Rating, Last Modified Date, Opportunity Owner, Account Name, and Opportunity Name. The "Opportunities" block contains 8 rows of opportunity data with similar columns. Both blocks have dropdown menus for sorting and filtering.

	Accounts Accounts block 1						Opportunities Opportunities block 1		
	Account Name	Billing State/Province	Type	Rating	Last Modified Date	Opportunity Owner	Account Name	Opportunity Name	
1	ample Account for Entitlements	-	-	-	16/08/2023	Zahid Khan	United Oil & Gas Corp.	United Oil Refinery Generators	
2	ge Communications	TX	Customer - Direct	Hot	16/08/2023	Zahid Khan	Burlington Textiles Corp of America	Burlington Textiles Weaving Plant	
3	arlinton Textiles Corp of America	NC	Customer - Direct	Warm	16/08/2023	Zahid Khan	Grand Hotels & Resorts Ltd	Grand Hotels Emergency Generat	
4	ramid Construction Inc.	-	Customer - Channel	-	16/08/2023	Zahid Khan	Dickenson plc	Dickenson Mobile Generators	
5	ckenson plc	KS	Customer - Channel	-	16/08/2023	Zahid Khan	Express Logistics and Transport	Express Logistics Standby Genera	
6	and Hotels & Resorts Ltd	IL	Customer - Direct	Warm	16/08/2023	Zahid Khan	GenePoint	GenePoint Standby Generator	
7	ress Logistics and Transport	OR	Customer - Channel	Cold	16/08/2023	Zahid Khan	Edge Communications	Edge Emergency Generator	
8	iversity of Arizona	AZ	Customer - Direct	Warm	16/08/2023	Zahid Khan	University of Arizona	University of AZ Portable Generat	
9	United Oil & Gas Corp.	NY	Customer - Direct	Hot	16/08/2023				

- We can also make Summary report for both the Report types. For example: we are making summary report by **account name**. as shown in below image we can see the summary report for both Report types.

The screenshot shows a summary report titled "Accounts & opportunities joined Report". The report displays two data blocks side-by-side: "Accounts Accounts block 1" and "Opportunities Opportunities block 1". The "Accounts" block contains 8 rows of account data with columns for Account Name, Account Owner, Billing State/Province, Type, Rating, Last Modified Date, Opportunity Owner, Opportunity Name, and Stage. The "Opportunities" block contains 8 rows of opportunity data with similar columns. The report uses grouping by "Account Name" to show summary counts for each account. At the bottom, there are checkboxes for Row Counts, Detail Rows, Subtotals, and Grand Total.

	Accounts Accounts block 1						Opportunities Opportunities block 1		
	Account Name	Account Owner	Billing State/Province	Type	Rating	Last Modified Date	Opportunity Owner	Opportunity Name	Stage
	Burlington Textiles Corp of America	Zahid Khan	NC	Customer - Direct	Warm	16/08/2023	Zahid Khan	Burlington Textiles Weaving Plant Generator	Closed
	Subtotal							Count: 1	
	Dickenson plc	Zahid Khan	KS	Customer - Channel	-	16/08/2023	Zahid Khan	Dickenson Mobile Generators	Qualif
	Subtotal							Count: 1	
	Edge Communications	Zahid Khan	TX	Customer - Direct	Hot	16/08/2023	Zahid Khan	Edge Emergency Generator	Closed
	Subtotal							Count: 1	
	Express Logistics and Transport	Zahid Khan	OR	Customer - Channel	Cold	16/08/2023	Zahid Khan	Express Logistics Standby Generator	Closed
	Subtotal							Count: 1	
	GenePoint								

- We can the report with those blocks which has some common fields.
- We can also Add chart after making summary report with joined report.

Bucket field

- Bucket field is used to group the report based on records on report.
- For example, in opportunities report there are 2 common records **closed won** and **closed lost** in stage column. if in opportunities **closed won** and **closed lost** are open so they grouped together and if the opportunities other than closed won and closed lost, so they grouped together.
- Its mean we have to create 2 bucket field 1 for closed won and closed lost and 2nd for open. If this like requirement, then we have to create bucket field.

Steps to create bucket field(picklist):

- 1st make a report on that object in which we want to make bucket field. For example, we are making report on opportunities.

The screenshot shows a Salesforce Opportunities report. The page header includes the Cognizant logo, a search bar, and various navigation links like Home, Students, Instructors, classes, StdClasses, Reports, and Dashboards. Below the header is a toolbar with buttons for Add Chart, Save & Run, Save, Close, and Run. The main area is titled "REPORT" and "New Opportunities Report". On the left, there's a sidebar titled "Fields" with sections for "Filters" and "Groups". The "Filters" section contains dropdowns for "Opportunity Owner", "Account Name", "Opportunity Name", "Stage", "Fiscal Period", "Amount", and "Expected Rev". The "Groups" section has an "Add group..." button. The main content area displays a table of 11 opportunities. The columns are: Opportunity Owner, Account Name, Opportunity Name, Stage, Fiscal Period, Amount, and Expected Rev. The "Stage" column values include Closed Won, Q1-2015, Q2-2015, Q3-2015, Prospecting, Qualification, and Closed Lost. The "Fiscal Period" column values include Q1-2015, Q2-2015, Q3-2015, and Q4-2015. The "Amount" and "Expected Rev" columns show monetary values. A tooltip at the top of the table says "Previewing a limited number of records. Run the report to see everything." and "Update Preview Automatically".

- Now our requirement is that make bucket field for stage column based on closed won and close lost.
- click on drop down arrow with the stage column and click on bucket this column.

This screenshot shows the same Opportunities report after applying a bucket field to the Stage column. The "Fields" sidebar now includes a "Columns" section with "Opportunity Owner", "Account Name", "Opportunity Name", "Stage", "Fiscal Period", "Amount", and "Expected Rev". The "Stage" column has a dropdown arrow with a tooltip "Bucket This Column" highlighted with a red box. Other options in the dropdown include "Sort Ascending", "Sort Descending", "Group Rows by This Field", "Group Columns by This Field", "Show Unique Count", "Move Left", "Move Right", and "Remove Column". The main table content remains the same as in the previous screenshot.

- After that enter the bucket name. after that click on Add bucket.

The screenshot shows the 'Edit Bucket Column' dialog box. The 'Field' dropdown is set to 'Stage'. The 'Bucket Name' input field contains 'Stage Bucket'. Below it, the 'All Values (10)' section shows a list of values: Prospecting, Qualification, Needs Analysis, Value Proposition, Id. Decision Makers, and Perception Analysis. A red box highlights the 'Add Bucket' button at the bottom left of the dialog.

- Make 2 bucket one for open opps, one for closed won and closed lost named as closed Opps.

The screenshot shows the 'Edit Bucket Column' dialog box. It displays two buckets: 'open opps. (0)' and 'closed opps. (0)'. Both buckets have edit and delete icons. A red box highlights the 'closed opps. (0)' bucket. The message 'This bucket does not contain any values.' is visible below the buckets.

- now click on unchecked value and move only closed won and closed lost to Closed Opps. Bucket and other should be move to open Opps.
- To move the All field except closed won and closed lost to open Opps. Click on unchecked value after that check all the field which we want to move and click on **Move To** button on bottom and choose the Open Opps. Folder in so that all field will move to open Opps.

- Same way moves closed won and closed lost to close Opps.

- After that click on apply.
- Now we will see a stage Bucket column name bucket at the end of the Reports.

- Now we will see only from stage closed won and closed lost in closed Opps.
Bucket and all others field from stage shown in open Opps.

The screenshot shows a report titled "Opportunities bucket Report". The table has columns: Opportunity Owner, Account Name, Opportunity Name, Stage, Stage Bucket, Fiscal Period, Amount, Expected Revenue, Probability (%), Age, and Close Date. A red box highlights the "Stage Bucket" column, indicating it is used for grouping. The data includes various opportunities like Grand Hotels Generator Installations, United Oil Refinery Generators, University of AZ Installations, etc., across different stages and buckets.

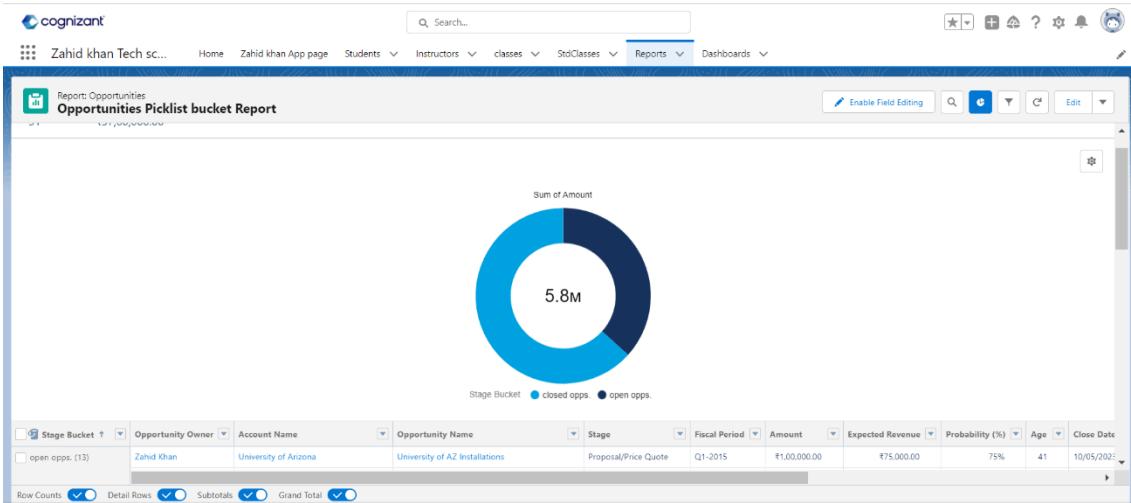
- Now we will use this **Stage Bucket** field for group. Click on Group row inside Outline left hand side bar. And search for **Stage Bucket**.

The screenshot shows the "Outline" section of the report configuration. The "Groups" section has "Stage Bucket" selected. The main table shows opportunities grouped by Stage Bucket, such as "closed opps.", "open opps.", "Prospecting", etc. The "Stage Bucket" field is highlighted with a red box.

- After clicking on stage bucket grouping will be done on the basis of this bucket.

The screenshot shows the "Outline" section with "open opps." selected in the "Groups" section. The main table now shows a subtotal for "closed opps." (17) and individual rows for "open opps." (8). The "open opps." group is highlighted with a red box.

- Like this we can create custom grouping field and create summary report. We can also add chart to this report by clicking on Add chart.

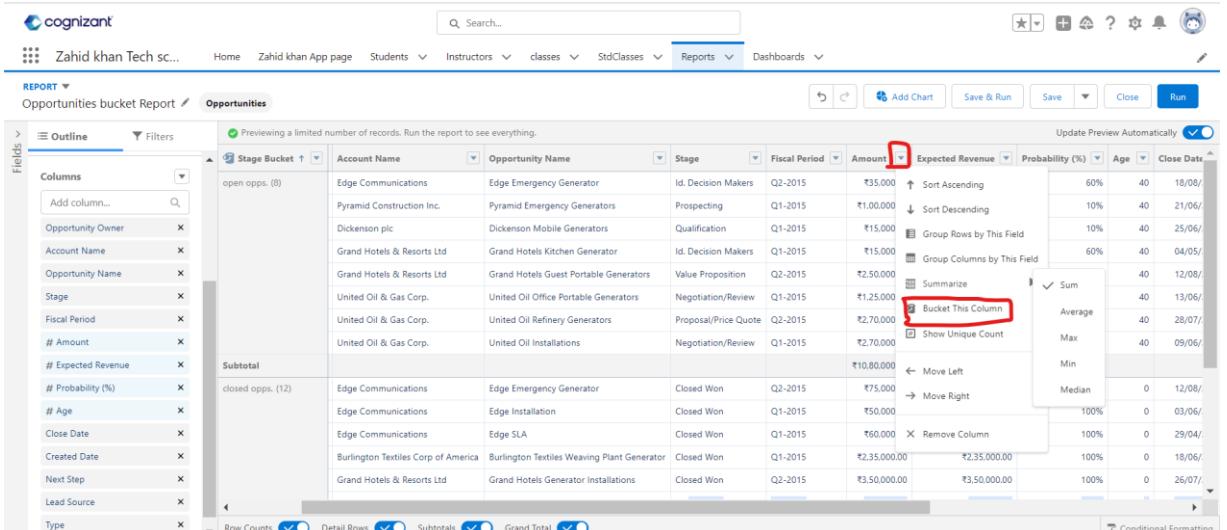


Bucket filed for numerical value:

- We can create bucket filed for numerical value and picklist. Before we see how to create for picklist now, we will see how to create bucket field for numerical value.
- We are creating bucket field for amount column and create 3 bucket 1st- 0 to 50000, 2nd – 50001 to 100000 and 3rd <100000.

Steps to create bucket field (for numerical value):

- Go to same summary report for opportunities and click on **Amount** column. After that click on the drop arrow with Amount column and click on **bucket this column**.



- Now enter the bucket name. for example, name the bucket as amount bucket. Name of the bucket depends on the project requirement.

- After that enter the 1st amount which is 0 to 50000 so its should be =>50000 and enter the bucket name as Low.
- Again enter 2nd amount which is 50000 to 100000 so it's written as >50000 to 100000 and enter bucket name as medium.
- Again enter 3rd amount which is >100000 so it's written as > 100000 and enter bucket name as high.
- And check the box that treats Empty column as Zero. After that click on apply.

Range	Bucket
<= 50000	Low
> 50,000 to 100000	Medium
> 100,000	High

- Now we will see that **Account bucket** is created.

Opportunity Name	Stage	Fiscal Period	Amount	Account Bucket	Expected Revenue	Probability (%)	Age	Close Date	Created Date
Edge Emergency Generator	Closed Won	Q2-2015	₹75,000.00	Medium	₹75,000.00	100%	0	12/08/2023	16/08/
Edge Installation	Closed Won	Q1-2015	₹50,000.00	Low	₹50,000.00	100%	0	03/05/2023	16/08/
Edge SLA	Closed Won	Q1-2015	₹60,000.00	Medium	₹60,000.00	100%	0	29/04/2023	16/08/
Edge Emergency Generator	Id. Decision Makers	Q2-2015	₹35,000.00	Low	₹21,000.00	60%	40	18/08/2023	16/08/
Burlington Textiles Weaving Plant Generator	Closed Won	Q1-2015	₹2,35,00,000.00	High	₹2,35,00,000.00	100%	0	18/06/2023	16/08/
Pyramid Emergency Generators	Prospecting	Q1-2015	₹1,00,000.00	Medium	₹10,000.00	10%	40	21/06/2023	16/08/
Dickenson Mobile Generators	Qualification	Q1-2015	₹15,000.00	Low	₹1,500.00	10%	40	25/05/2023	16/08/
Grand Hotels Kitchen Generator	Id. Decision Makers	Q1-2015	₹15,000.00	Low	₹9,000.00	60%	40	04/05/2023	16/08/
Grand Hotels Guest Portable Generators	Value Proposition	Q2-2015	₹2,50,000.00	High	₹1,25,000.00	50%	40	12/08/2023	16/08/
Grand Hotels Generator Installations	Closed Won	Q2-2015	₹3,50,000.00	High	₹3,50,000.00	100%	0	26/07/2023	16/08/
Grand Hotels SLA	Closed Won	Q1-2015	₹90,000.00	Medium	₹90,000.00	100%	0	06/05/2023	16/08/
Grand Hotels Emergency Generators	Closed Won	Q2-2015	₹2,10,000.00	High	₹2,10,000.00	100%	0	24/07/2023	16/08/
United Oil SLA	Closed Won	Q2-2015	₹1,20,000.00	High	₹1,20,000.00	100%	0	04/08/2023	16/08/
United Oil Office Portable Generators	Negotiation/Review	Q1-2015	₹1,25,000.00	High	₹1,12,500.00	90%	40	13/05/2023	16/08/
United Oil Refinery Generators	Proposal/Price Quote	Q3-2015	₹2,02,500.00	High	₹2,02,500.00	75%	40	28/07/2023	16/08/

- Now we will use this **Account Bucket** field for grouping. Click on Group rows inside Outline left hand side bar. And search for **Account Bucket**

Screenshot of the Cognizant CRM interface showing a report titled "New Opportunities Report". The report displays opportunities for Zahid Khan Tech sc... across various fields like Opportunity Owner, Account Name, Opportunity Name, Stage, Amount, Fiscal Period, and Expected Revenue. A red box highlights the "Amount Bucket" field in the bucket fields section.

Opportunity Owner	Account Name	Opportunity Name	Stage	Amount	Fiscal Period	Expected Revenue
Zahid Khan	Edge Communications	Edge Emergency Generator	Closed Won	₹75,000.00	Q2-2015	₹21,000.00
Zahid Khan	Edge Communications	Edge Installation	Closed Won	₹50,000.00	Q1-2015	₹15,000.00
Zahid Khan	Edge Communications	Edge SLA	Closed Won	₹60,000.00	Q1-2015	₹18,000.00
Zahid Khan	Edge Communications	Edge Emergency Generator	Id. Decision Makers	₹35,000.00	Q2-2015	₹10,500.00
Zahid Khan	Burlington Textiles Corp of America	Burlington Textiles Weaving Plant Generator	Closed Won	₹2,35,00,000.00	Q1-2015	₹60,50,000.00
Zahid Khan	Pyramid Construction Inc.	Pyramid Emergency Generators	Prospecting	₹1,00,00,000.00	Q1-2015	₹30,00,000.00
Zahid Khan	Dickenson plc	Dickenson Mobile Generators	Qualification	₹15,00,000.00	Q1-2015	₹4,50,000.00
Zahid Khan	Grand Hotels & Resorts Ltd	Grand Hotels Kitchen Generator	Id. Decision Makers	₹15,00,000.00	Q1-2015	₹4,50,000.00
Zahid Khan	Grand Hotels & Resorts Ltd	Grand Hotels Guest Portable Generators	Value Proposition	₹2,50,00,000.00	Q2-2015	₹75,00,000.00
Zahid Khan	Grand Hotels & Resorts Ltd	Grand Hotels Generator Installations	Closed Won	₹3,50,00,000.00	Q2-2015	₹10,50,000.00
Zahid Khan	Grand Hotels & Resorts Ltd	Grand Hotels SLA	Closed Won	₹90,00,000.00	Q1-2015	₹27,00,000.00

- now we will see that Report is summarized based on **Amount Bucket**. Low, Medium, High.

Screenshot of the Cognizant CRM interface showing a report titled "Opportunities Amount Bucket Report". The report displays opportunities categorized by amount bucket (Low, Medium, High) across various fields. A red box highlights the "Amount Bucket" field in the bucket fields section.

Opportunity Owner	Account Name	Opportunity Name	Stage	Amount	Expected Revenue	Probability (%)	Age	Close Date	Created Date
Zahid Khan	Edge Communications	Edge Emergency Generator	Id. Decision Makers	₹35,00,000.00	₹21,000.00	60%	41	18/08/2023	16/08/2023
Zahid Khan	Dickenson plc	Dickenson Mobile Generators	Qualification	₹15,00,000.00	₹1,50,000.00	10%	41	25/06/2023	16/08/2023
Zahid Khan	Grand Hotels & Resorts Ltd	Grand Hotels Kitchen Generator	Id. Decision Makers	₹15,00,000.00	₹9,00,000.00	60%	41	04/05/2023	16/08/2023
Zahid Khan	University of Arizona	University of AZ Portable Generators	Closed Won	₹50,00,000.00	₹50,00,000.00	100%	0	13/05/2023	16/08/2023
Zahid Khan	GenePoint	GenePoint SLA	Closed Won	₹30,00,000.00	₹30,00,000.00	100%	0	09/08/2023	16/08/2023
Zahid Khan	Edge Communications	Edge Installation	Closed Won	₹50,00,000.00	₹50,00,000.00	100%	0	03/06/2023	16/08/2023
Subtotal				₹1,95,00,000.00					
Zahid Khan	University of Arizona	University of AZ Installations	Proposal/Price Quote	₹1,00,00,000.00	₹75,00,000.00	75%	41	10/05/2023	16/08/2023
Zahid Khan	University of Arizona	University of AZ SLA	Closed Won	₹90,00,000.00	₹90,00,000.00	100%	0	17/05/2023	16/08/2023
Zahid Khan	Grand Hotels & Resorts Ltd	Grand Hotels SLA	Closed Won	₹90,00,000.00	₹90,00,000.00	100%	0	06/05/2023	16/08/2023
Zahid Khan	GenePoint	GenePoint Standby Generator	Closed Won	₹85,00,000.00	₹85,00,000.00	100%	0	16/06/2023	16/08/2023
Zahid Khan	Edge Communications	Edge Emergency Generator	Closed Won	₹75,00,000.00	₹75,00,000.00	100%	0	12/08/2023	16/08/2023
Zahid Khan	Pyramid Construction Inc.	Pyramid Emergency Generators	Prospecting	₹1,00,00,000.00	₹10,00,000.00	10%	41	21/06/2023	16/08/2023

- We can also add Chart.

Screenshot of the Cognizant CRM interface showing a report titled "Opportunities Amount Bucket Report" with a donut chart overlay. The chart shows the sum of amount for each amount bucket: High (5.8M), Low (8.0M), and Medium (740k). A red box highlights the "Amount Bucket" field in the bucket fields section.

Opportunity Owner	Account Name	Opportunity Name	Stage	Amount	Expected Revenue	Probability (%)	Age	Close Date	Created Date
Zahid Khan	Edge Communications	Edge Emergency Generator	Id. Decision Makers	₹35,00,000.00	₹21,000.00	60%	41	18/08/2023	16/08/2023
Zahid Khan	Dickenson plc	Dickenson Mobile Generators	Qualification	₹15,00,000.00	₹1,50,000.00	10%	41	25/06/2023	16/08/2023
Zahid Khan	Grand Hotels & Resorts Ltd	Grand Hotels Kitchen Generator	Id. Decision Makers	₹15,00,000.00	₹9,00,000.00	60%	41	04/05/2023	16/08/2023

Row-level Formula

- Row-level Formula is similar to Formula Field.
- Row-level Formula and bucket field only available in Report. It would be available under actual Object. Its for reporting purpose only.

Steps to create Row-level Formula in report:

- create a new Report on opportunities. Save the report in a folder.
- Now for Apply the Row-level Formula click on drop-down arrow beside the columns on left hand side menu. And click on **Add Row-level Formula**.

The screenshot shows the Salesforce Opportunities report interface. On the left, there's a sidebar titled 'Columns' with various options like 'Add column...', 'Owner Role', 'Opportunity Owner', 'Account Name', etc. A red box highlights the 'Add Row-Level Formula' option under the 'Opportunities' section. The main area displays a table of opportunity data with columns for Owner Role, Opportunity Owner, Account Name, Opportunity Name, Stage, Fiscal Period, Amount, Expected Revenue, Probability (%), Age, and C. At the top, there are buttons for 'Save & Run', 'Save', 'Close', and 'Run'.

- After that new pop-up will open, we have to enter the name of the column, description, Formula output type (in which we got 4 options number, text, date/time, date). And decimals.
- After that we have to Add the formula by inserting the field. For example, we are going to multiply the Amount with 2. So, for this select Field (Amount) from Search filed option and insert it and multiply it with 2.
- After that click on validate and click on Apply.

This screenshot shows the 'Edit Row-Level Formula Column' dialog box. It has tabs for 'Fields' and 'Functions'. Under 'Fields', 'amount' is selected. Under 'Functions', '# Double' is selected. In the main area, 'Column Name' is set to 'Double Amount', 'Decimal Points' is set to '2', and the 'Formula' field contains the expression '1 AMOUNT*2'. Step numbers 1 through 7 are overlaid on the interface: 1 points to the 'Column Name' input, 2 points to the 'Decimal Points' dropdown, 3 points to the 'Fields' list, 4 points to the 'Functions' list, 5 points to the formula entry field, 6 points to the 'Validate' button, and 7 points to the 'Apply' button. The background shows the same Opportunities report page as the previous screenshot.

- We can also apply Function to the formula.

The screenshot shows the Salesforce Report Builder interface. A modal window titled "Edit Row-Level Formula Column" is open. In the "Functions" tab, a search bar is at the top, followed by a list of functions under "Date & Time (22)". Below the search bar, there are buttons for arithmetic operations (+, -, *, /, ^, (,)). The formula being built is "1 AMOUNT * 2". To the right of the formula, there is a "Decimal Points" dropdown set to 2. At the bottom of the modal are "Validate", "Cancel", and "Apply" buttons. The background shows a list of opportunities with columns for "Expected Revenue", "Probability (%)", and "Age".

- If we want to edit the formula field, then just click on drop-down arrow beside the created row-level formula and click on edit.

The screenshot shows the Opportunities list view in Salesforce. A context menu is open over the "fx Double Amount" column header. The "Edit Formula" option in the menu is highlighted with a red box. Other options visible in the menu include "Show Unique Count", "Summarize", "Move Left", "Move Right", and "Remove Column". The background shows a list of opportunities with various details like Opportunity Owner, Account Name, and Stage.

- we can also calculate average, max, min, median of any numerical value. For example, we will calculate all these for amount column.
- To do so click on the drop down Arrow beside the Amount column and click on summarize after that click on the Arrow we will find option for average, sum, max, min, median.

Opportunities Amount Bucket Report

Opportunity Owner	Account Name	Opportunity Name	Stage	Amount	Expected Revenue	Probability (%)	Age
Zahid Khan	Dickenson plc	Dickenson Mobile Generators	Qualification	₹15,000.00	₹1,500.00	10%	42
Zahid Khan	Grand Hotels & Resorts Ltd	Grand Hotels Kitchen Generator	Id. Decision Makers	₹15,000.00	₹9,000.00	60%	42
Zahid Khan	Edge Communications	Edge Emergency Generator	Id. Decision Makers	₹35,000.00	₹21,000.00	60%	0
Zahid Khan	Edge Communications	Edge Installation	Closed Won	₹50,000.00	₹30,000.00	100%	0
Subtotal							
Zahid Khan	Edge Communications	Edge SLA	Closed Won	₹60,000.00	₹36,000.00	100%	0
Zahid Khan	Edge Communications	Edge Emergency Generator	Closed Won	₹75,000.00	₹45,000.00	100%	0
Zahid Khan	Grand Hotels & Resorts Ltd	Grand Hotels SLA	Closed Won	₹90,000.00	₹54,000.00	100%	0
Zahid Khan	Pyramid Construction Inc.	Pyramid Emergency Generators	Prospecting	₹1,00,000.00	₹60,000.00	100%	0
Subtotal							
Low (4)							
Medium (4)							
High (2)							

Report Statistics:

- Total Records: 31
- Total Amount: ₹57,60,000.00
- Average Amount: ₹1,85,806.45
- Maximum Amount: ₹9,15,000.00
- Minimum Amount: ₹15,000.00
- Median Amount: ₹1,20,000.00

Summary Options:

- Sum
- Average
- Max
- Min
- Median

<https://d5j00000cgpseav-dev-ed.develop.lightning.force.com/reports/lightningReportApp.app?reportId=00O5j000009WcMyEAK#>

- After applying this and save the report and click on Run.

Report: Opportunities
Opportunities Amount Bucket Report

Opportunity Owner	Account Name	Opportunity Name	Stage	Amount	Expected Revenue	Probability (%)	Age	Close Date	Created Date
Zahid Khan	Dickenson plc	Dickenson Mobile Generators	Qualification	₹15,000.00	₹1,500.00	10%	42	25/06/2023	10/06/2023
Zahid Khan	Grand Hotels & Resorts Ltd	Grand Hotels Kitchen Generator	Id. Decision Makers	₹15,000.00	₹9,000.00	60%	42	04/08/2023	10/06/2023
Zahid Khan	GenePoint	GenePoint SLA	Closed Won	₹30,000.00	₹30,000.00	100%	0	09/08/2023	10/06/2023
Zahid Khan	Edge Communications	Edge Emergency Generator	Id. Decision Makers	₹35,000.00	₹21,000.00	60%	42	18/08/2023	10/06/2023
Zahid Khan	University of Arizona	University of AZ Portable Generators	Closed Won	₹50,000.00	₹30,000.00	100%	0	13/05/2023	10/06/2023
Zahid Khan	Edge Communications	Edge Installation	Closed Won	₹50,000.00	₹30,000.00	100%	0	03/06/2023	10/06/2023
Subtotal									
Zahid Khan	GenePoint	GenePoint Lab Generators	Id. Decision Makers	₹60,000.00	₹36,000.00	60%	42	06/08/2023	10/06/2023
Zahid Khan	Edge Communications	Edge SLA	Closed Won	₹60,000.00	₹36,000.00	100%	0	29/04/2023	10/06/2023
Zahid Khan	Edge Communications	Edge Emergency Generator	Closed Won	₹75,000.00	₹45,000.00	100%	0	12/08/2023	10/06/2023
Zahid Khan	Express Logistics and Transport	Express Logistics Portable Truck Generators	Value Proposition	₹80,000.00	₹40,000.00	50%	42	07/05/2023	10/06/2023
Subtotal									
Low (6)									
Medium (9)									
High (2)									

Report Statistics:

- Total Records: 31
- Total Amount: ₹57,60,000.00
- Average Amount: ₹1,85,806.45
- Maximum Amount: ₹9,15,000.00
- Minimum Amount: ₹15,000.00
- Median Amount: ₹1,20,000.00

Summary Options:

- Sum
- Average
- Max
- Min
- Median

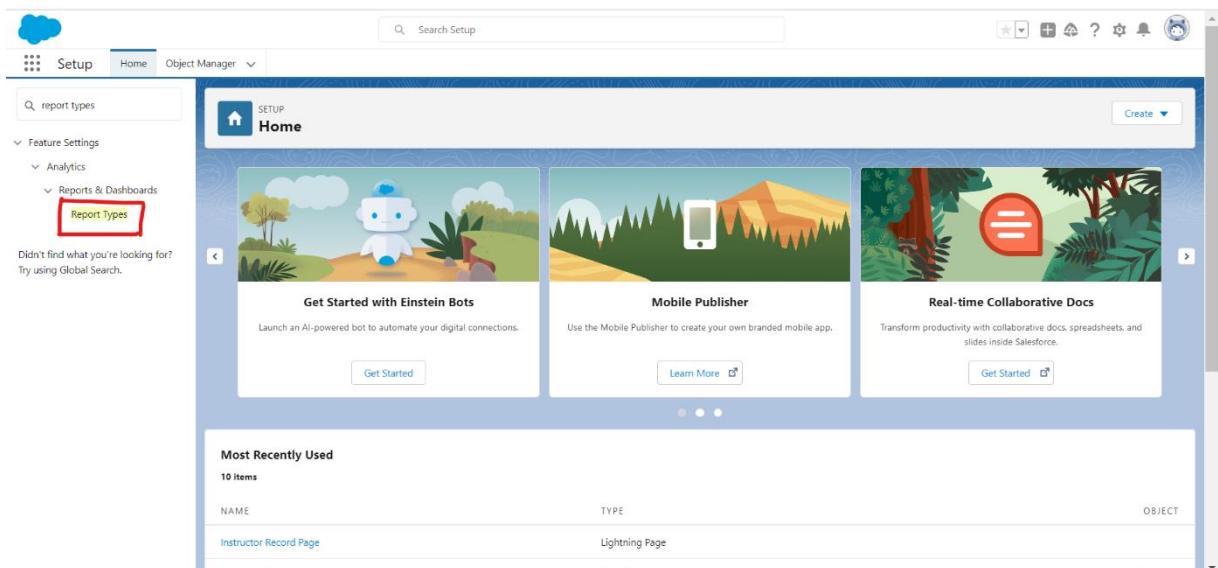
Day-10

Reports on Duplicate Records

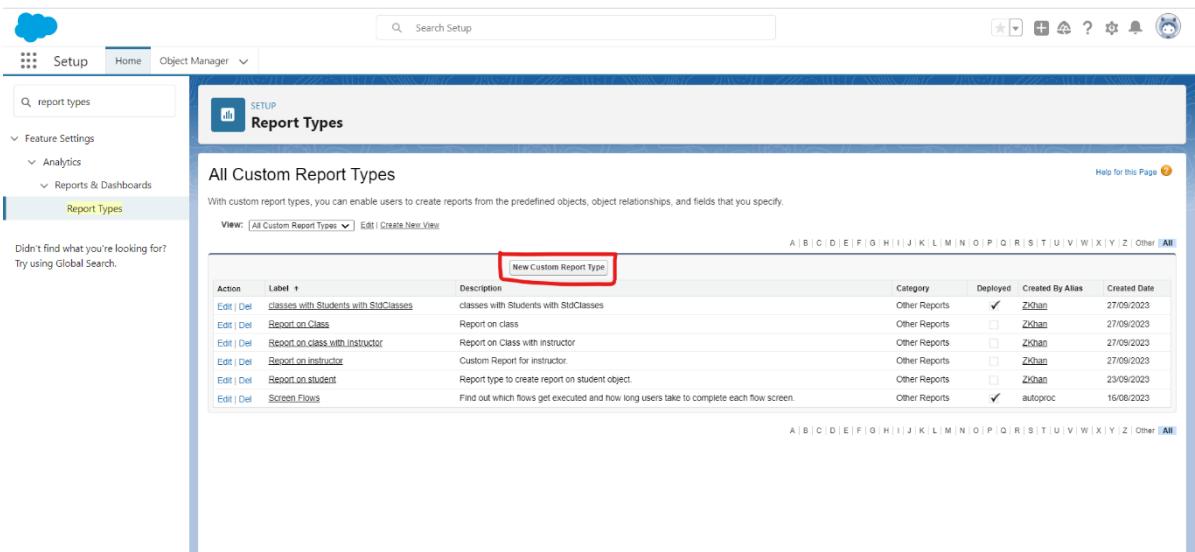
- If there are any duplicate records in our org so it will be visible in duplication records.

Steps to create Reports on duplication:

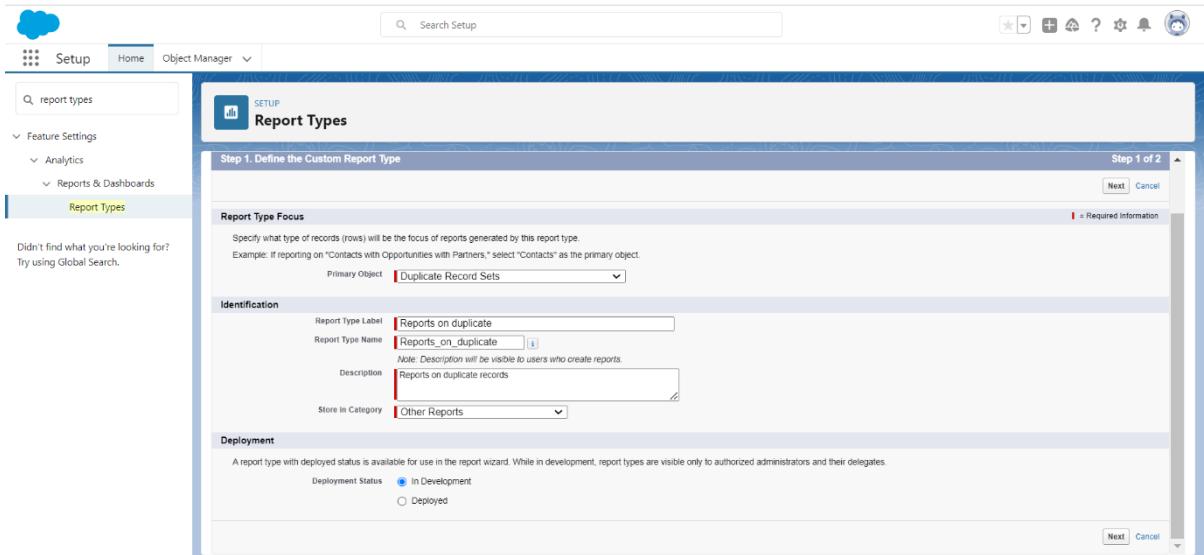
- Go to the set-up and click on Home.
- After that search for **Report Types** in Quick search.



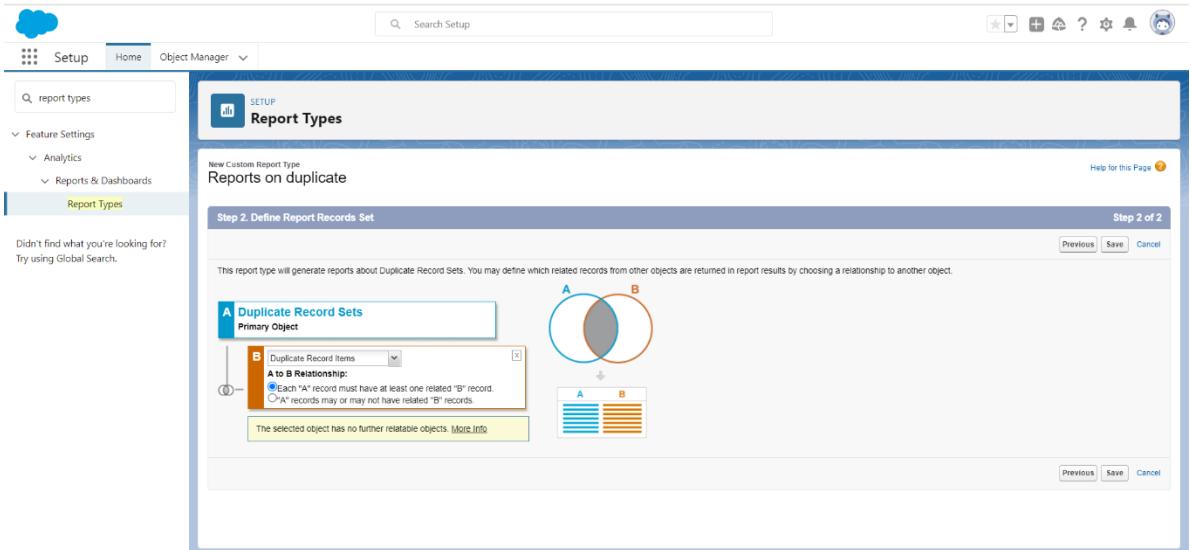
- Now click on Report Types. After that click on **New custom Report Type**.



- After that select **Duplicate report sets** in primary object. Enter report type label, description, select other records in store in category. Select **In development** in deployment status.
- After that click on next.



- After that select **Duplicate records items** in B and select **Each A record must have at least one related B record**. And click on save.



- Now go to Front-end of the App and click on **Report Tab**. After that click on **New Report** to create a Report.

The screenshot shows the Salesforce Reports page. The top navigation bar includes links for Home, Zahid khan App page, Students, Instructors, classes, StdClasses, Reports (which is the active tab), and Dashboards. Below the navigation is a search bar labeled 'Search...'. The main content area is titled 'Recent' and contains a table with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The table lists various reports such as 'Opportunities Row-level formula Report', 'Contacts & Accounts summary Report', and 'Opportunities Amount Bucket Report'. At the bottom right of the table is a 'New Report' button, which is also highlighted with a red box.

- After that click on **other reports** and select Reports on duplicate which we make in Report types section and click on **start Report** button.

The screenshot shows the 'Create Report' dialog box. On the left, a sidebar titled 'Category' lists various report types: Leads, Campaigns, Activities, Contracts and Orders, Price Books, Products and Assets, Administrative Reports, File and Content Reports, Individuals, and 'Other Reports', which is highlighted with a red box. The main area is titled 'Select a Report Type' and lists several report types: classes, classes with Students, classes with StdClasses and Students, Report on Instructor, classes with Students with StdClasses, Report on student, Report on class with Instructor, Reports on duplicate, Report on Class, and Screen Flows. The 'Reports on duplicate' item is also highlighted with a red box. To the right, there is a 'Details' panel for the 'Reports on duplicate' report type, showing its description ('Reports on duplicate records'), created by ('No Reports Yet'), and created by others ('No Reports Yet'). A 'Start Report' button is located in this panel, also highlighted with a red box.

- If there are any duplicate report in our org so it will show in these reports.
- We can create tabular, summary, matrix reports on duplication records in org. we can also apply chart for this report.

Export Reports

- Whatever Report we created will export or download these reports in our local system.

Steps to Export Reports in Local system:

- To export any report, click on Report tab in Front-end. After that click on All folder and select the folder of the report which contain the report and after that select the report which we want to export in our system.
- For example, we are selecting summary of the Account. For this we have to go to summary report folder.

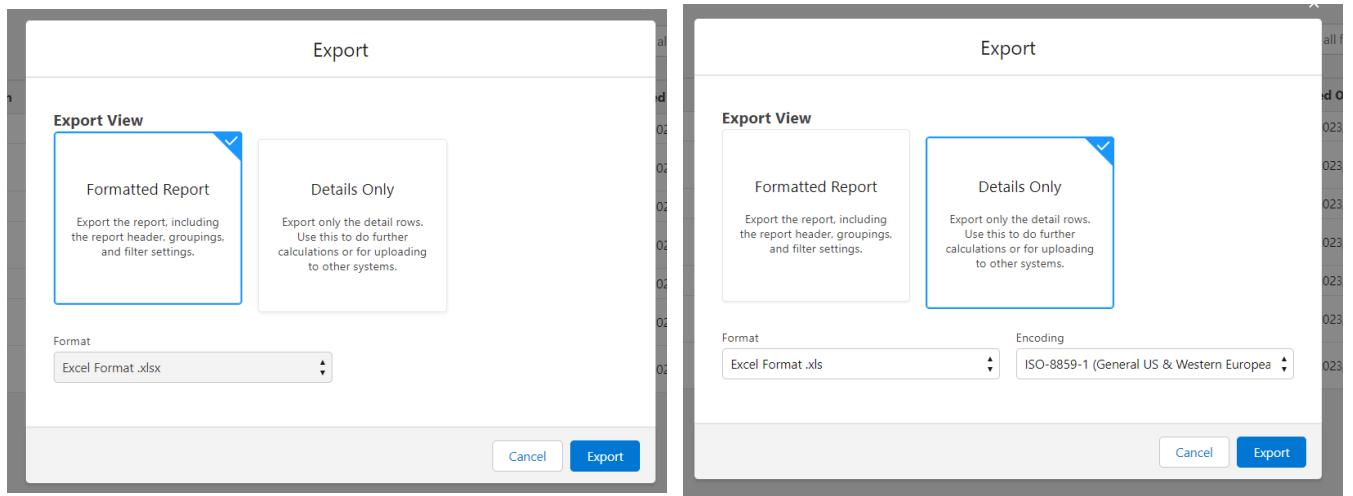
The screenshot shows the Cognizant platform interface. The top navigation bar includes links for Home, Zahid khan App page, Students, Instructors, classes, StdClasses, Reports (which is highlighted with a red box), and Dashboards. Below the navigation is a search bar and various icons. The main content area is titled 'Reports' and 'All Folders'. It lists reports categorized by name, created by, created on, last modified by, and last modified date. A sidebar on the left shows 'All Folders' (highlighted with a red box) and other categories like 'Created by Me' and 'Shared with Me'. A specific report named 'Summary Reports' is highlighted with a red box. At the bottom, there's a Chatter Feed.

After that we want to export opportunities Report in our system. So, click on drop-down arrow in the line of the respective Report and click on export.

The screenshot shows the 'Summary Reports' folder within the 'All Folders' section. The sidebar shows 'All Folders' (highlighted with a red box). A context menu is open over the first report in the list, with the 'Export' option highlighted with a red box. Other options in the menu include Run, Edit, Subscribe, Delete, Add to Dashboard, Favorite, and Move.

- After that we got 2 options.
 - Formatted Report:** if we select the formatted report so the report will download with all headers, grouping and filters. The format of this report is come with only 1 option **.xlsx**.
 - Details Only:** if we select the details only so the report will download with only row records. The format of this report is come with 3 formats i.e., **.xls, .xlsx, .csv**.

We have to also choose encoding. Download this report if we have a requirement to share this report with other system.



- After selecting anyone option click on Export. So that the reports will download in local system.

Dashboards

- Dashboard can't be created without report.

What is Dashboard?

- A dashboard is a visual display of key metrics and trends records in your org.
- Source of dashboard is reports.
- You can place one report in multiple dashboards components on a single dashboard.
- Having multiple reports on a single dashboard page makes it a powerful visual display tool.

Dashboard folders.

Like reports, dashboard is stored in a folder, so:

- Dashboard folder controls who have access to its content.
- If one has to access to folder, then only one can access its dashboards.

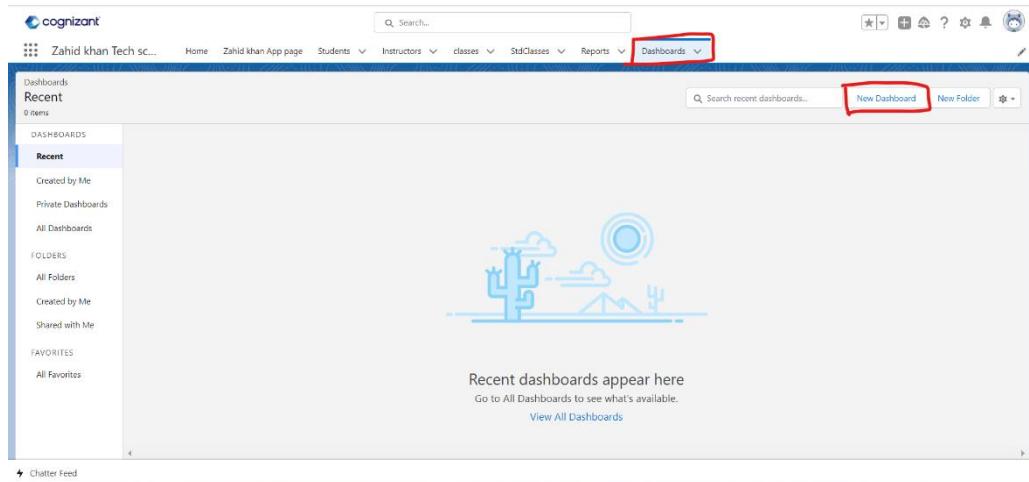
- However, to view the dashboard components, one need access to underlying reports as well.

Important about Dashboard:

- Each dashboard has a running user.
- Running user's security setting determine which data to display in dashboard.
- If running user is a specific user then all dashboard viewers see data security setting of that user, regardless of their own security settings.
- Dynamic dashboards are those for which running user is always logged in user. Here, each user views the dashboard as per their own security settings.

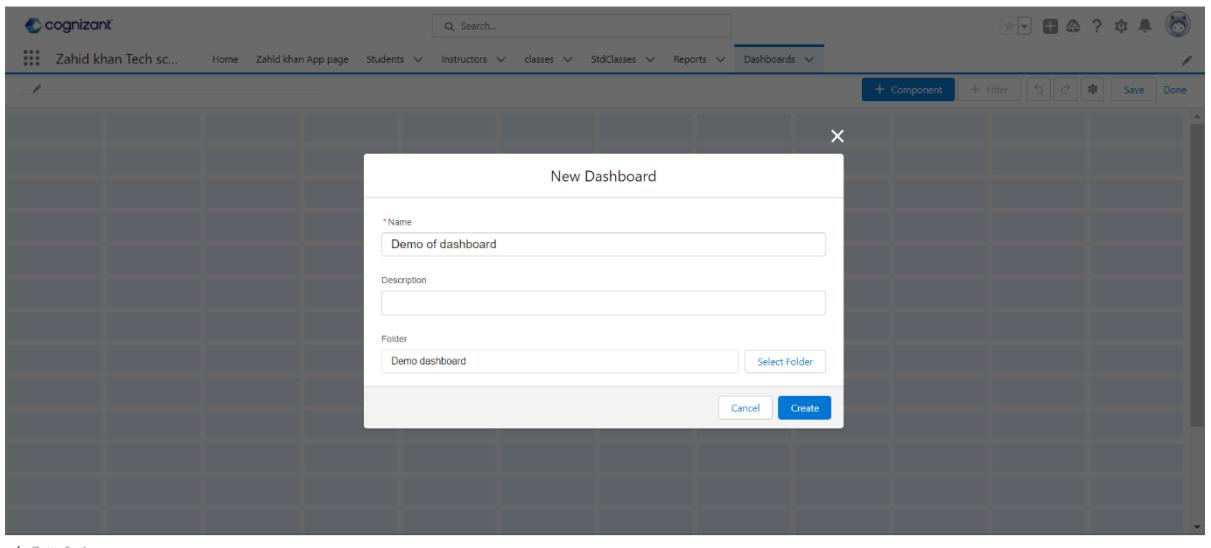
Steps to create Dashboard:

- Go to front-end of the Org. and click on dashboard tab. After that click on **New Dashboard**.

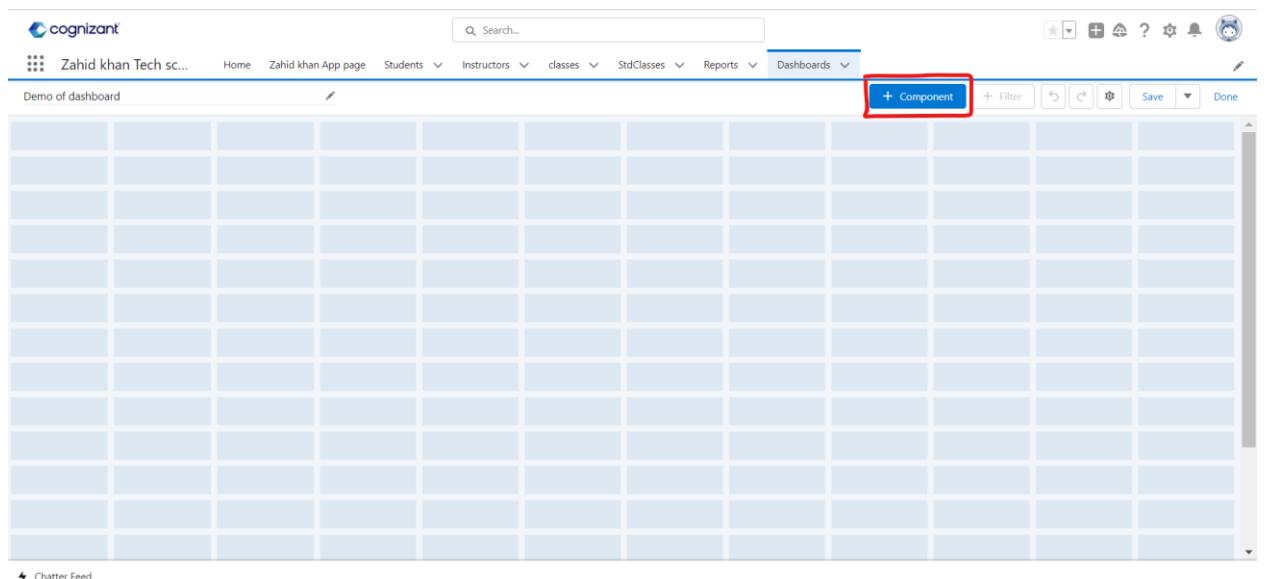


- After that we got a pop-up in which we have to enter Name, description, and choose folder. Note: we will not be able to make dashboard for that report which is in private folder.
- Here we make a folder named as Demo dashboard.

- After that click on Create.



- After that click on +component option top of the page to add the report in this dashboard.



- When we click on **+component** All reports will be visible. If we want to show all reports together then we have to click on All Reports option from left hand side. If we want to choose reports from folder so we have to click on All folder from left hand side.
- We can place all report like, tabular, summary, matrix and joined.

- For tabular report table will add in dashboard. For summary, matrix and joined chart will be Added in Dashboard.

Select Report

Recent

Created by Me

Private Reports

Public Reports

All Reports

Folders

Created by Me

Shared with Me

All Folders

Account Tabular Report
Zahid Khan - 23-Sept-2023, 10:18 pm - Tabular Reports

Accounts & opportunities joined Report
Zahid Khan - 25-Sept-2023, 3:02 pm - joined Report

Cases tabular Report
Zahid Khan - 20-Sept-2023, 12:49 pm - Tabular Reports

class with instructor.
Zahid Khan - 27-Sept-2023, 3:17 pm - practice

Cancel Select

- Here we are selecting All folder and added some reports from tabular, summary, matrix and joined folder to the dashboard.
- After selecting a click on select and then click on Add.
- For summary, matrix, joined report we will select chart here.
- We got lots of option to customize our report chart.

Add Component

Opportunities summary Report

Use chart settings from report

Display As

Value: Sum of Amount

Sliced By: Account Name

Preview

Opportunities summary Report

Sum of Amount

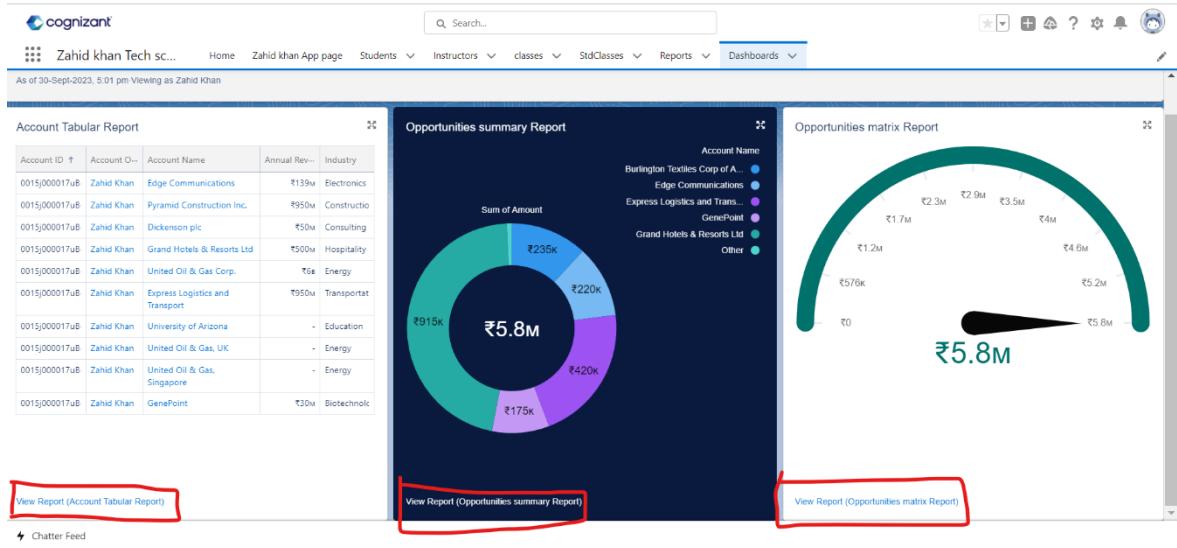
Account Name

Account Name	Value
Burlington Textiles C...	\$2.25M
Edge Communications	\$2.20M
Express Logistics an...	\$1.42M
GenePoint	\$1.15M
Grand Hotels & Res...	\$0.80M
Other	\$0.175M

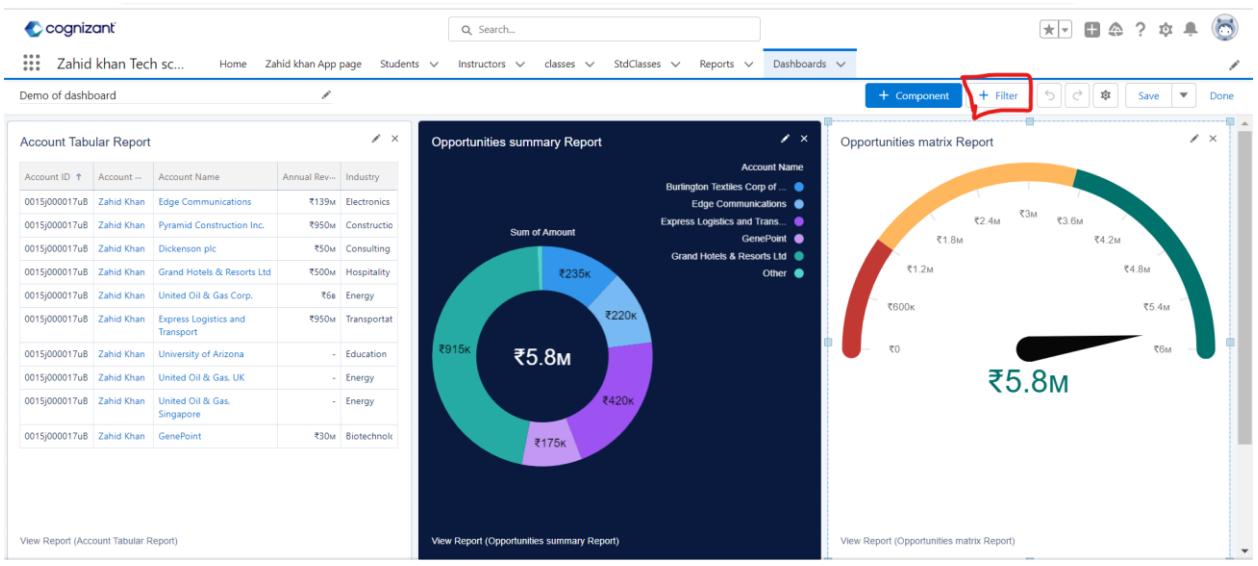
Cancel Add

- Click on Add to add this chart on dashboard canvas.

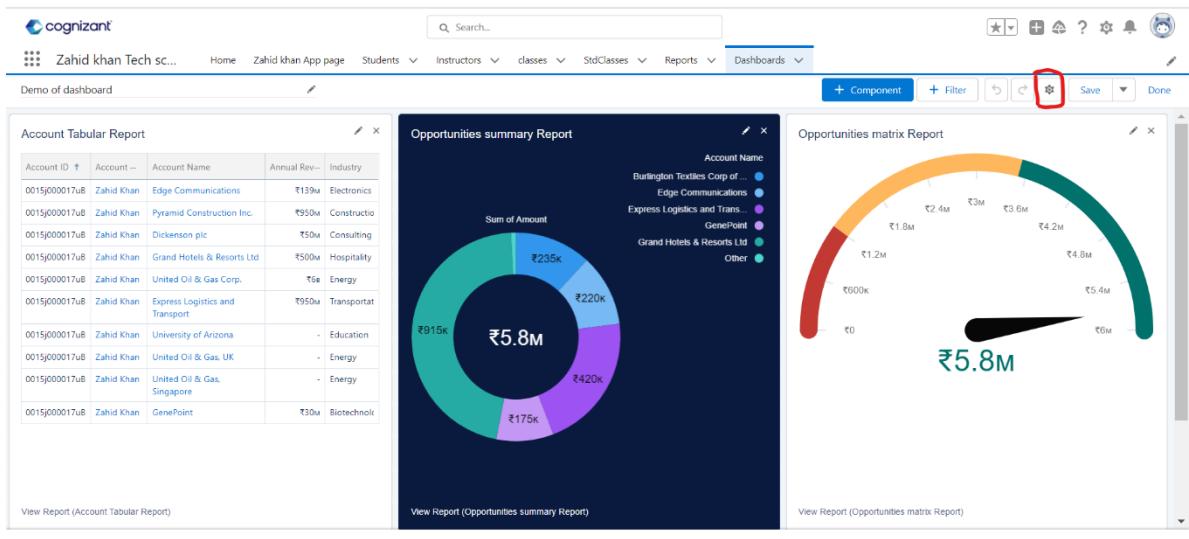
- After Adding all chart click on save and done.
- After that we will see our dashboard inside the folder which we created.
- We have also a report link at below of the chart on dashboard if we click on that click so it will redirect us to the Report.



- We have a Refresh option to refresh the chart if we make any changes in report, edit button and subscribe button in which we have download, delete, save as and new dashboard option.
- We can also Apply filter in our dashboard.

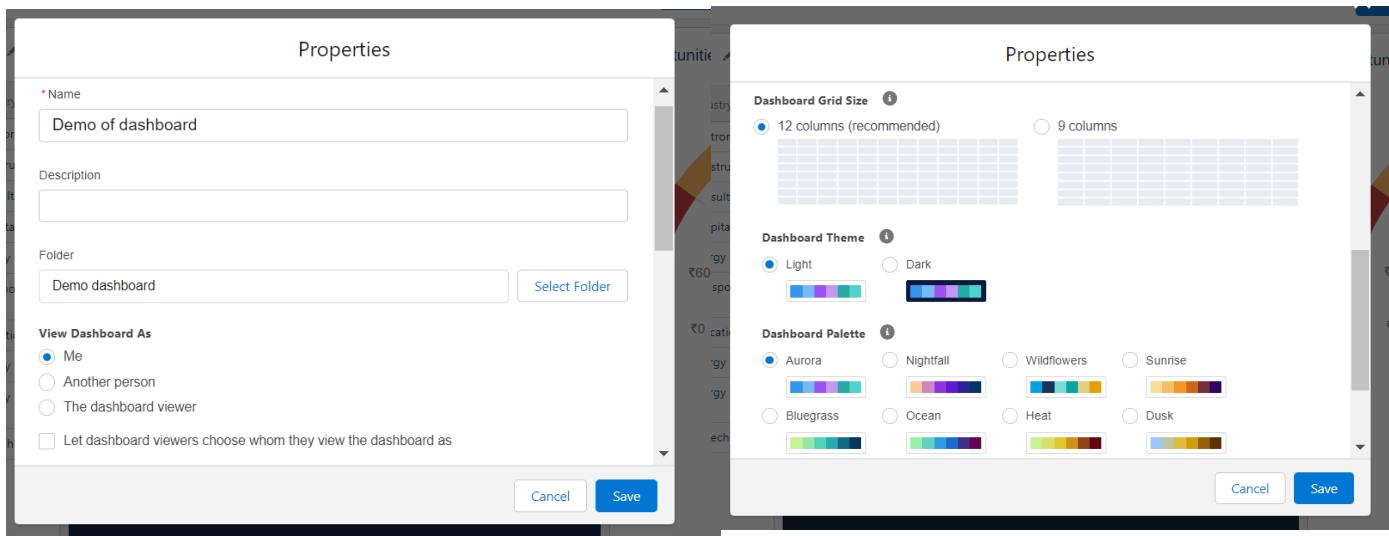


- Click on setting icon beside save button. We will see page configuration of



dashboard.

- After that we got a properties pop-up in which name of the dashboard is available, description, Folder, view dashboard as like, Me, another person (we have to select the user), The dashboard viewers (best option), dashboard Grid Size like 12 column or 9 columns. Dashboard theme like light or dark and dashboard palette.

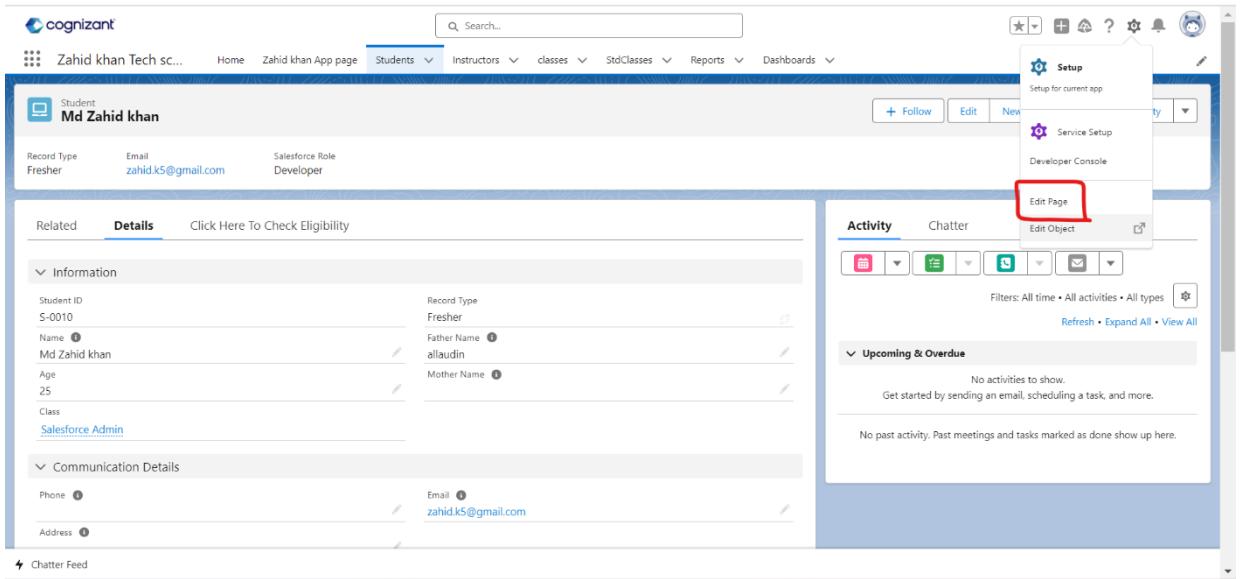


Reports and dashboard on Lighting page

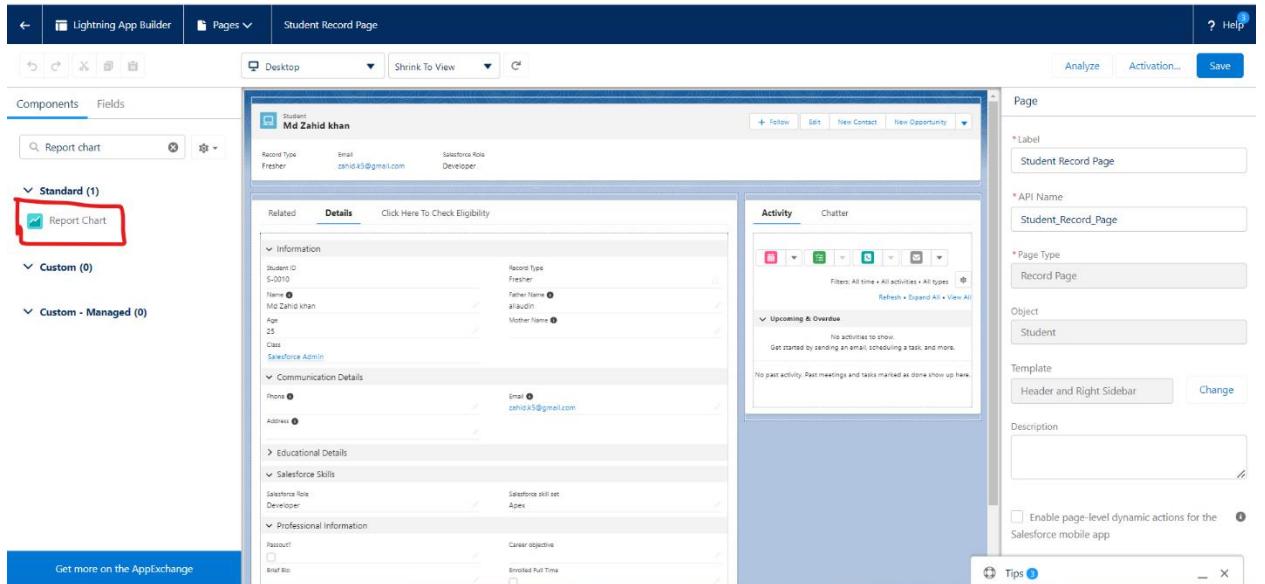
- As we know that there are three types of lighting page Home, Record and App page.
- We can add reports chart in our home, record, and App page.

Steps to place Report chart on Record page:

- Previously we were created Report on student object, so we are going to place Report chart on student record page.
- Click on student page on front-end and open any record. After that click on set-up icon on top and select Edit page.



- After that search for Report Chart. And drag it to below of Activity page.



- Now select student summary reports in Report field at right hand side.

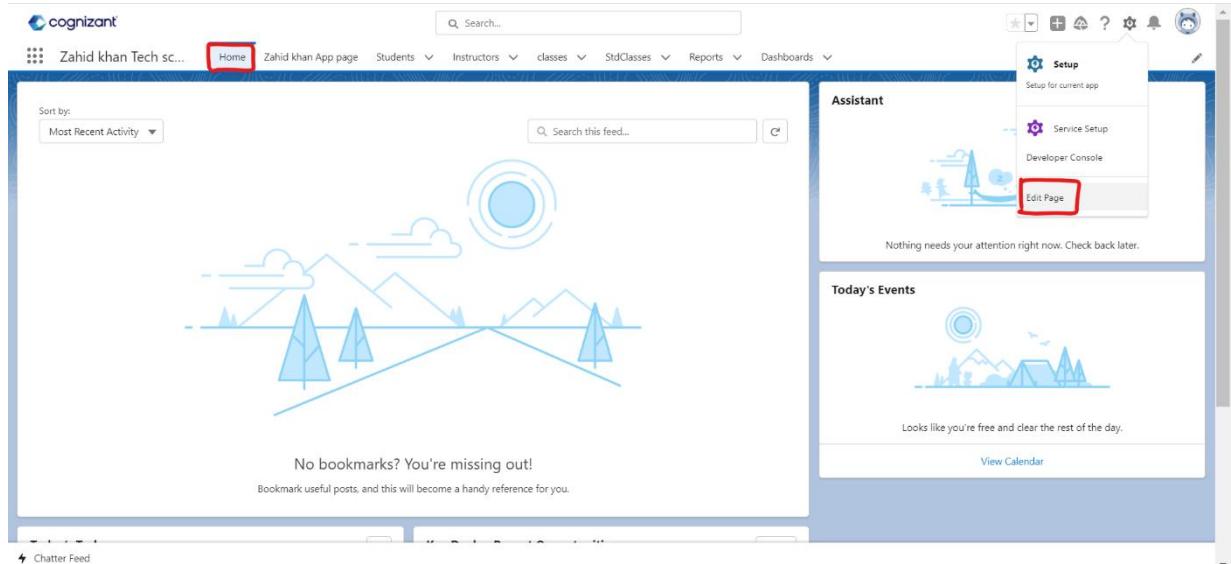
The screenshot shows the Lightning App Builder interface. On the left, there's a sidebar with 'Components' and 'Fields' sections. Under 'Components', there's a search bar and a list of components: 'Standard (1)' containing 'Report Chart', and 'Custom (0)' and 'Custom - Managed (0)'. On the right, there's a main area for creating a 'Report Chart' component. It has a 'Label' field ('Leave blank for default...'), a 'Report' field where 'student summary report' is selected (highlighted with a red box), and a 'Filter By' field set to 'None'. Below these are sections for 'Activity' (Chatter feed) and 'student summary report' (containing a pie chart with the value '118'). At the bottom, there are buttons for 'Save' and 'Cancel'.

- After that click on save. Now go to front-end and check that the chart of student report will be visible in all records of student object.
- If we click on View Report so it will redirect us to the respective report page.

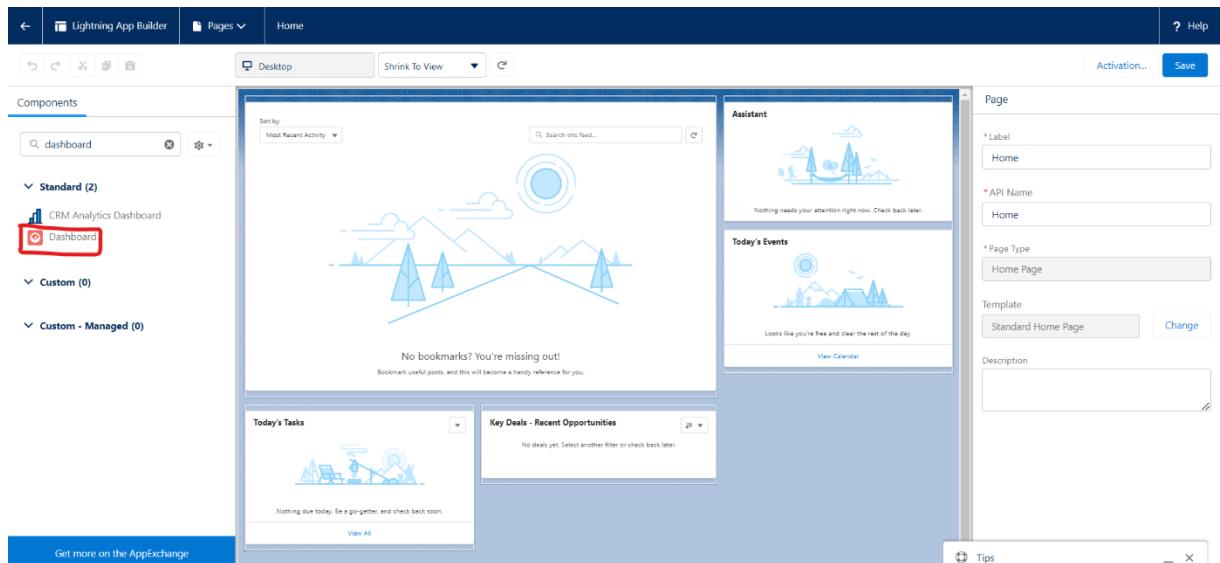
The screenshot shows a Salesforce page for a student named 'Md Zahid khan'. The page includes sections for 'Communication Details', 'Educational Details', 'Salesforce Skills', and 'Professional Information'. On the right side, there is a 'student summary report' component featuring a pie chart with the value '118'. Below the chart is a 'View Report' button, which is highlighted with a red box. The page also includes standard Salesforce navigation elements like 'Home', 'Students', 'Instructors', etc., and a top navigation bar with the cognizant logo.

Steps to place dashboard and report in home lighting page:

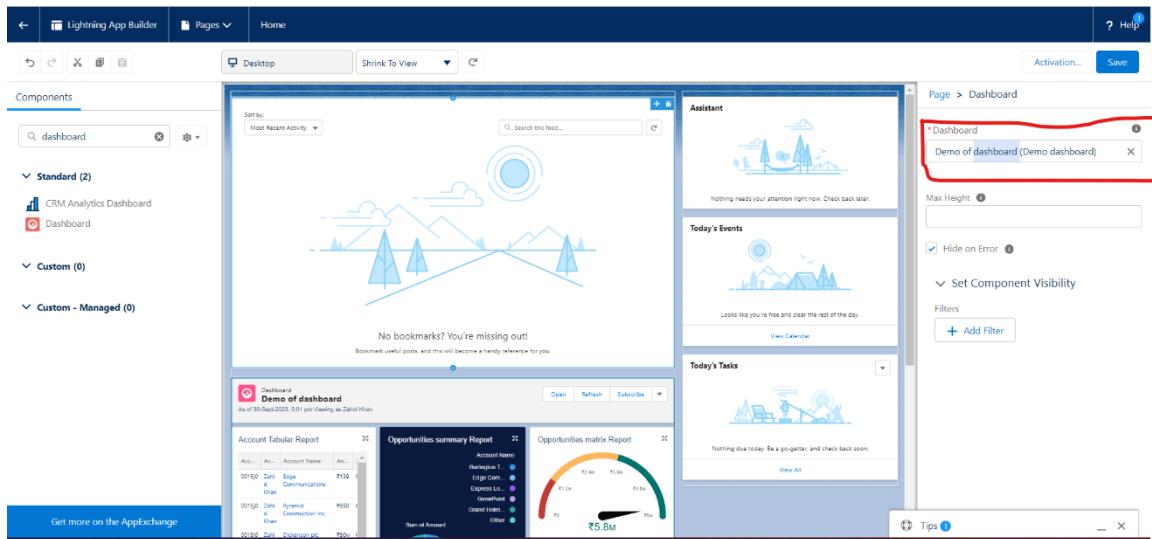
- Click on Home tab which we created previously after that click on setup and click on Edit page.



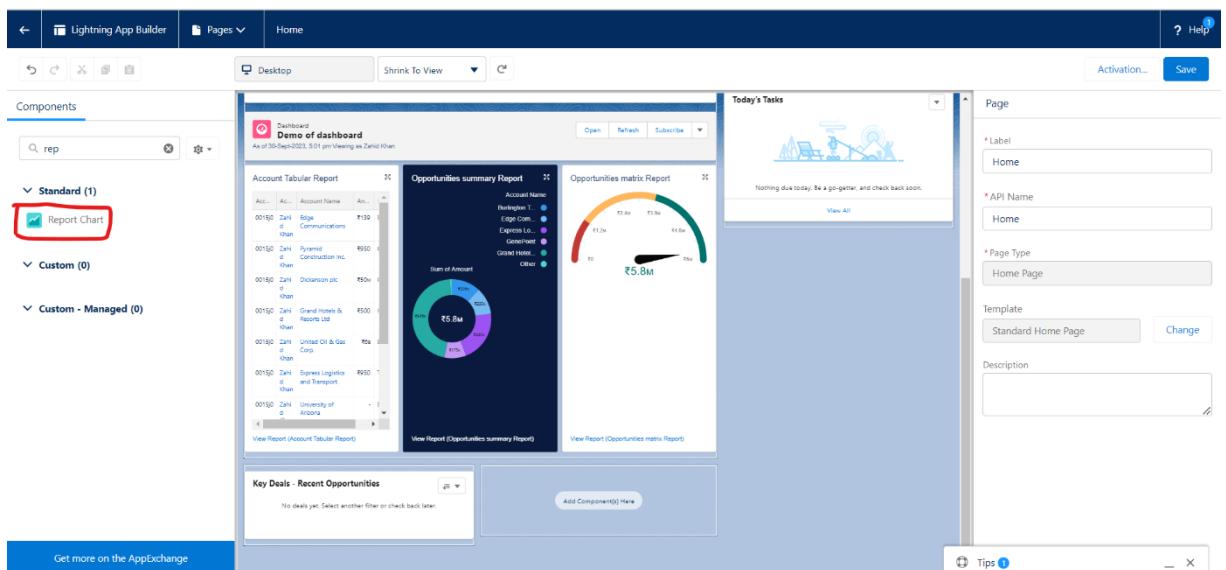
- After that search for **Dashboard** on left hand side search bar.



- Drag it to the home page. And select the Dashboard folder from Right hand side. Currently we have only one folder so its showing one dashboard only.



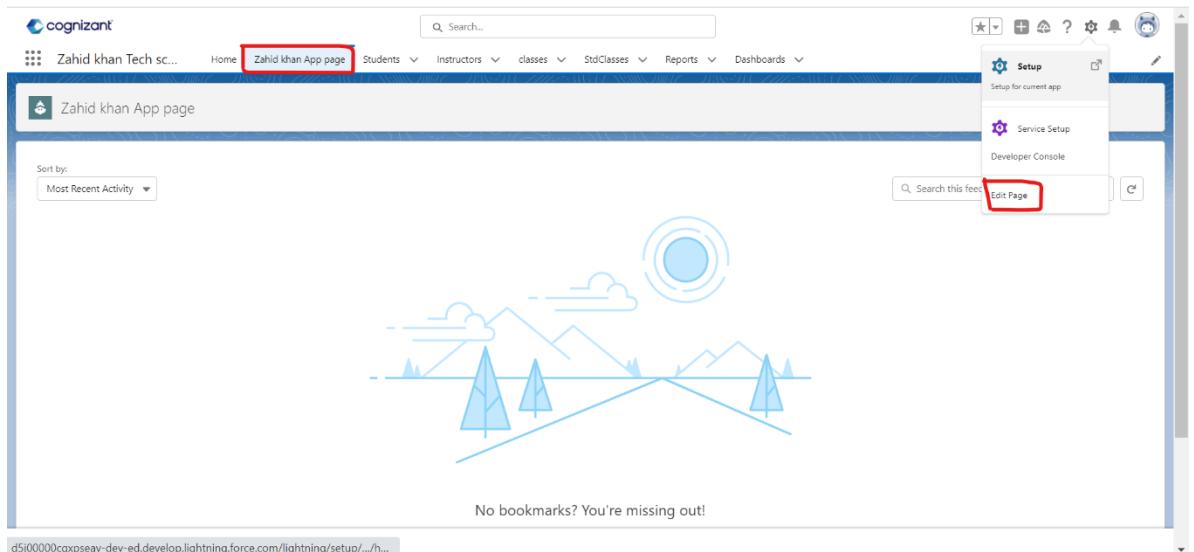
- We can also add **report** on home page. For this search for report Chart and drag it to the home page. We can select any report from Report field from right hand side.



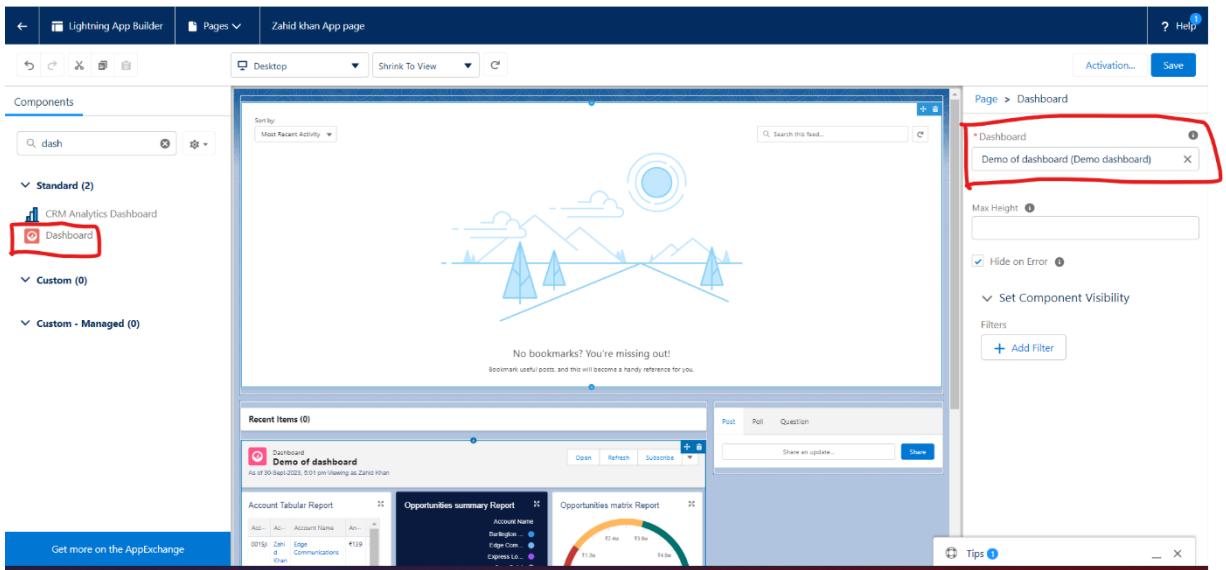
- Now click on save.
- Go to Front-end and check.

Steps to create Report and dashboard in App page:

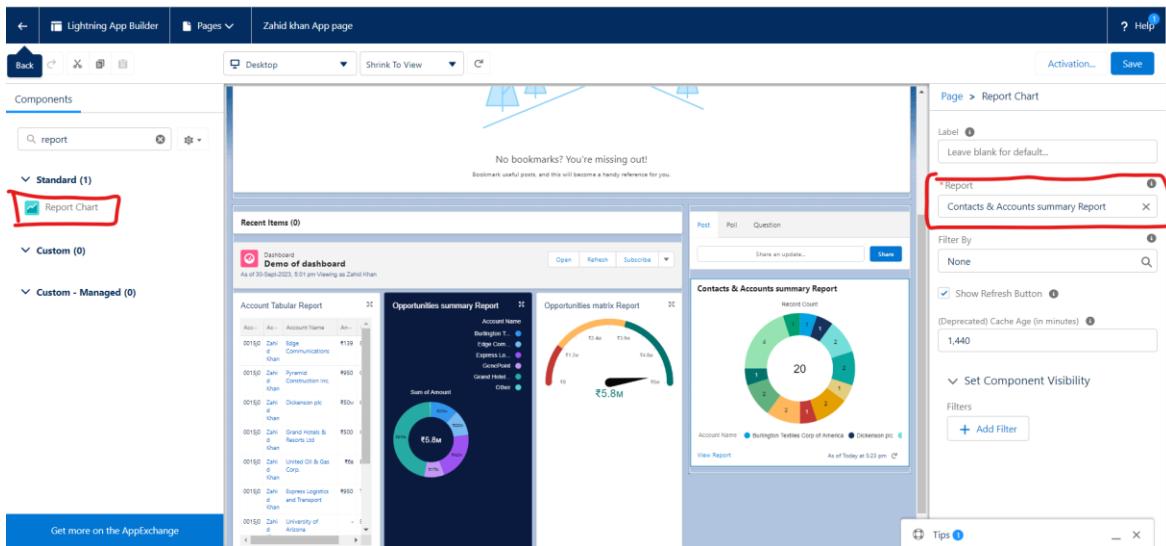
- Like home and record page we can add dashboard and report in App page.
- Click on App page on front-end of the page and after that click on set-up icon and click on edit page.



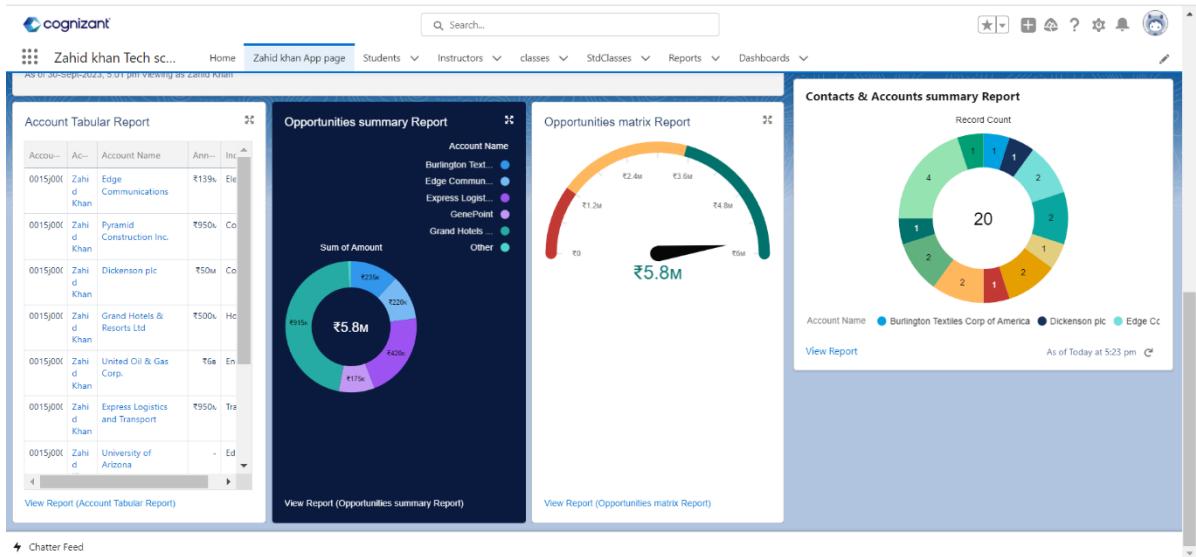
- After that search for dashboard and place it inside the App page. Then select the dashboard folder from right hand side.



- For insert the report search for report chart and drag it inside the app page. After that select the report from right hand side.



- After that click on save.
- Go to front-end and check the dashboard and report will be visible in App page.



Share Report and Dashboard

- Sharing the reports and dashboard between users.
- In report and dashboard, we can share Folder not individual report or dashboard.

Steps to share report and dashboard:

- Go to Report tab on Front-end after that click on **All folders** to show the available folder. After that open any folder (which you want to share). For example, we are taking summary report folder. After that click on drop-down arrow along with the folder.
- After that click on share option. So, that we can share complete folder with another user.

The screenshot shows the Salesforce Reports interface. On the left, there's a sidebar with categories like Reports, Folders, Favorites, and Favorites. The main area shows a table of reports and folders. A context menu is open over a folder in the table, with options like 'Favorite', 'Share' (which is circled in red), 'Rename', and 'Delete'.

- After clicking on share one pop-up will open in which we have to select the user with share this report, Names, Access like, view, manage, edit. After that click on share button so that user will add below. At last, click on done so this report will share with respective users.

The screenshot shows the 'Share folder' dialog box. It has sections for 'Share With' (Roles or Names), 'Who Can Access' (listing Zahid Khan and CEO), and a 'Done' button at the bottom right.

Steps to share dashboard:

- Go to Dashboard tab on Front-end after that click on **All folders** to show the available folder. After that open any folder (which you want to share). For example, we are taking Demo dashboard folder. After that click on drop-down arrow along with the folder.
- After that click on share option. So, that we can share complete folder with another user.

- After clicking on share one pop-up will open in which we have to select the user with share this report, Names, Access like, view, manage, edit. After that click on share button so that user will add below. At last, click on done so this report will share with respective users.

Day-11

Introduction:

- Data security is important because you need to control what a user or group of user can see in the org or app.
 - Salesforce provides layered sharing model.
 - You can easily assign different data sets to different group of users.
 - You can control access to your whole org, any specific object, fields, and records.

Level of data Access:

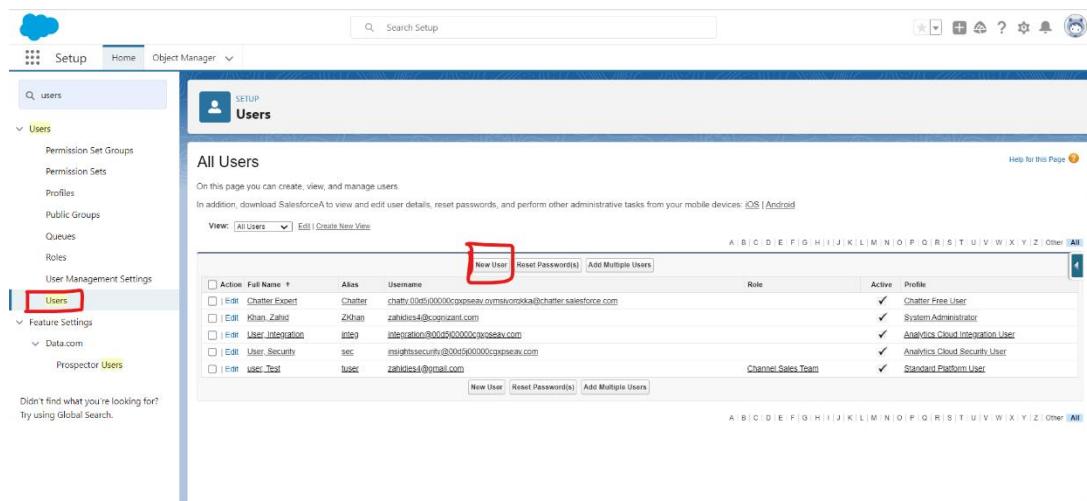
- Organization
 - Objects
 - Fields
 - Records

Organization:

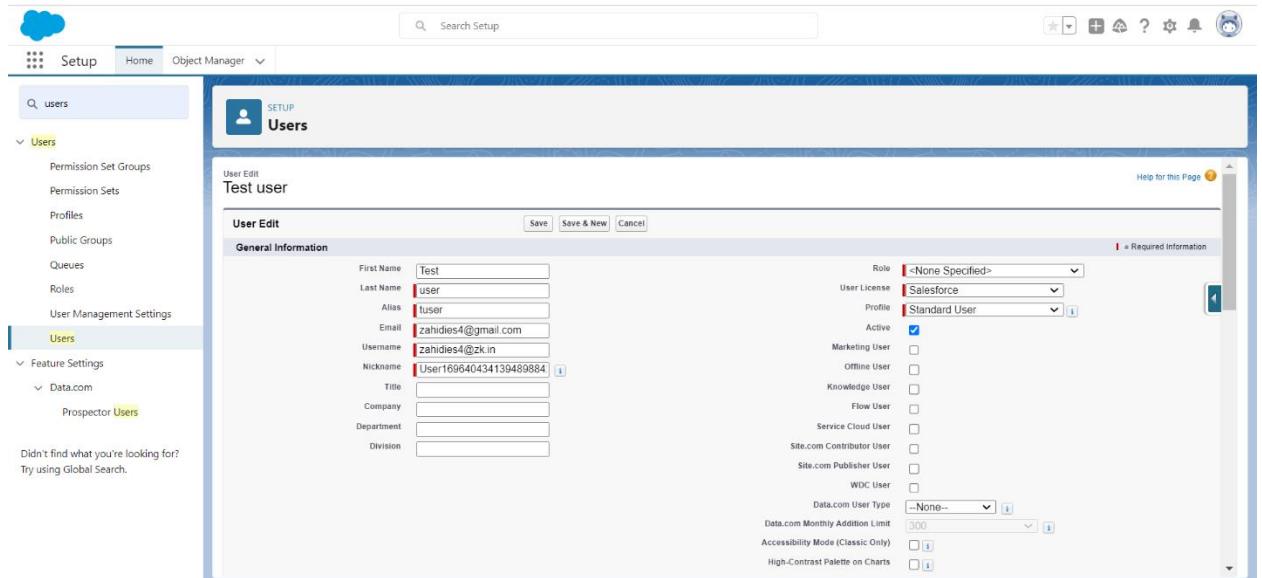
- Maintain a list of authorized users.
 - Set password policies.
 - Limit login to certain hours and locations.
 - I. Limit IP addresses from which users can log in.
 - II. Limit the times at which users can log in.

Steps to create User in Org.

- We can create no. of user in our org and control the access like what they can see and what they can do. In developer edition we can create max. 2 users in free trial license.
 - To create a user, go to setup and search for **Users** and click on it. After that click on **new Users**.

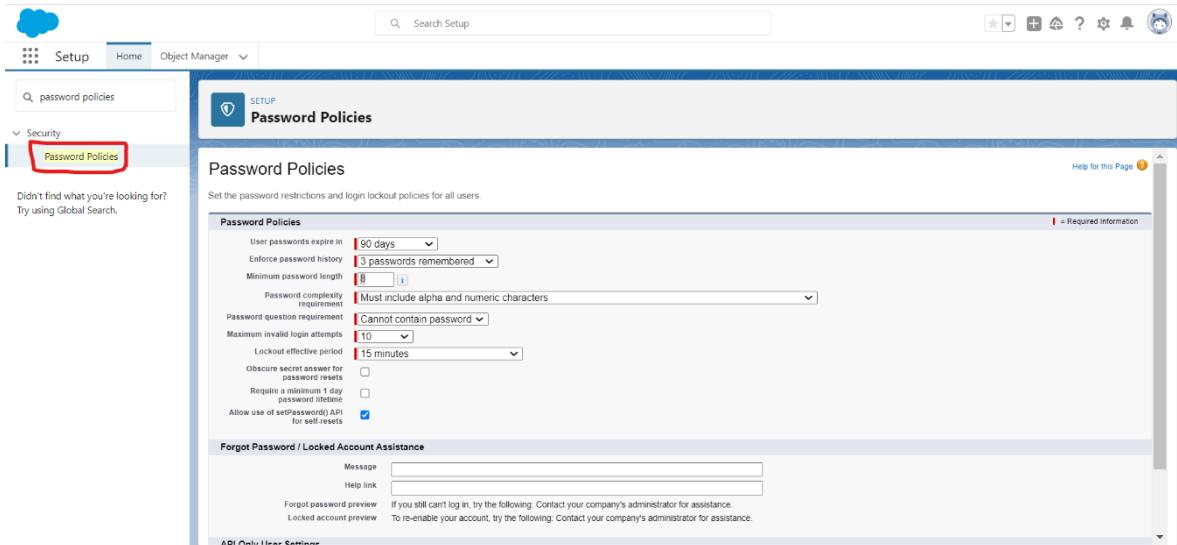


- After that enter first name, last name, username, email select role, select role, select user license as **salesforce** and profile as **standard users** the details & check the box **generate new password and notify user immediately** and click on save new users will be created.



Steps to set password policies:

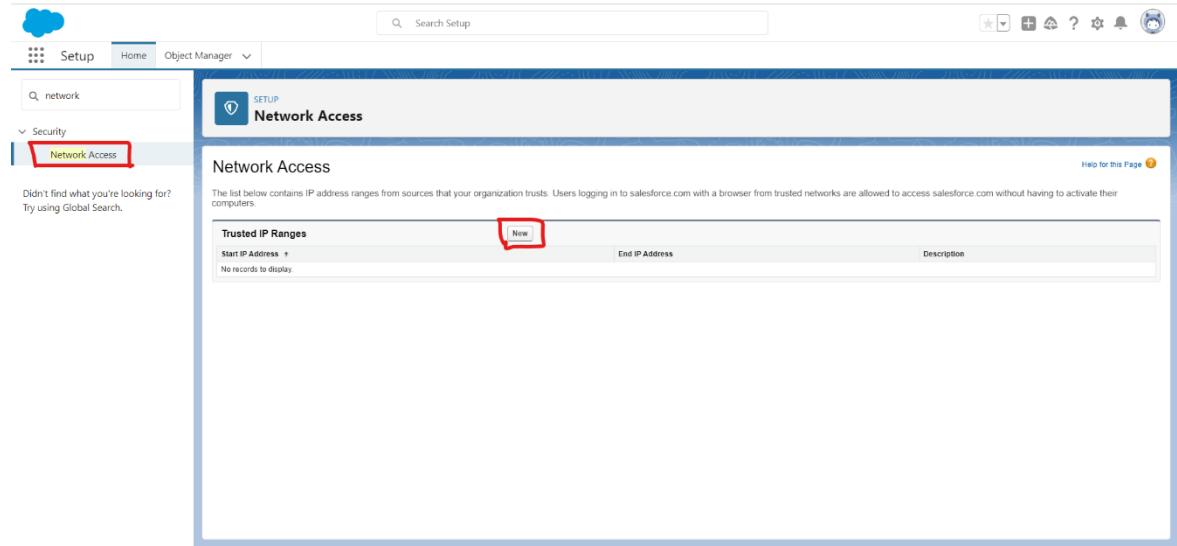
- Go to set up and click on home after that search for password policies in Quick search. And click on this.



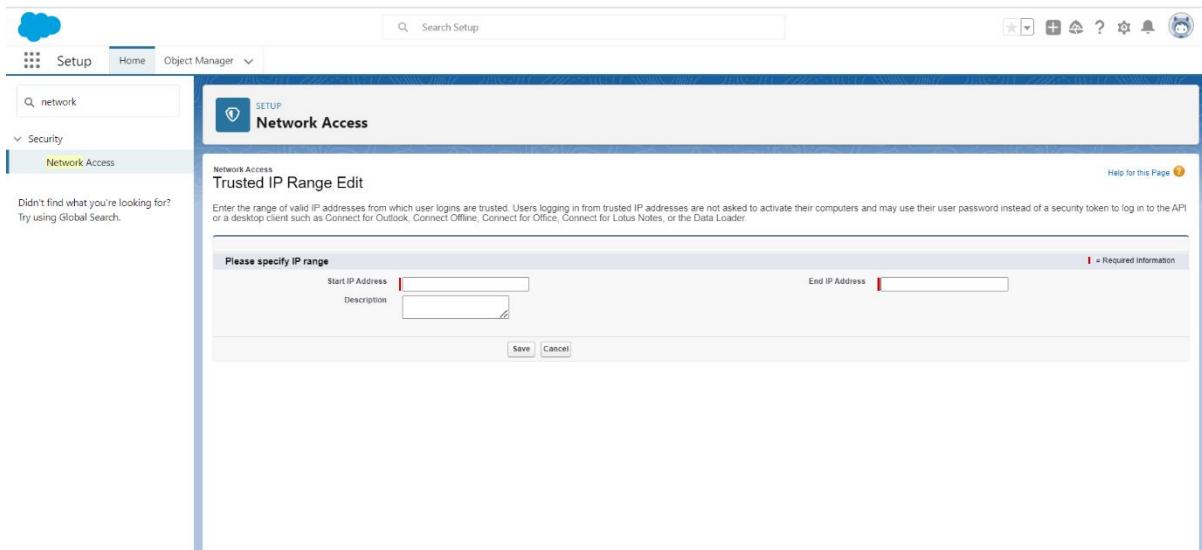
- Now we have to select the Options based on requirement and save. So that policies will set.
- This password policy will control the whole org.

Steps to Limit IP address and locations:

- Go to setup and search for **network access** in Search box. And click on it. After that click on new.



- We have to enter that range of Ip address start and end Ip address.
- Now enter that start and end Ip address and click on save.



Object level security:

- You can control level permissions for both standard and custom objects.
- You can set permissions for a particular object.

- You can give permissions to view, create, edit, and delete any records of that object.
- You can control object permissions using profiles and permissions sets.

Field level security:

- You can restrict access to certain fields in salesforce, even if user has object level access.
- You can make a field visible to a particular user and can hide that from another user.
- You can give read and edit permission to a field, if you don't give both then that field will not be visible.
- Field level security can be controlled using profiles and permissions sets.

Profiles

- We can control the access of objects and fields using profiles.
- A profile setting determines which data the user can see, and permissions determine what the user can do with that data.
- A profile can be assigned to many users, but a user can have only one profile at a time.
- To create new profile, you need to clone existing profile.

What can be controlled through profile?

- Assigned App & Assigned connected Apps.
- Object settings.
- App permissions.
- Apex class & Visual force page access.
- External data source access.
- Named credentials access.
- Flow access.
- Custom permissions & custom metadata type.
- Custom settings definitions.
- System permissions.

Steps to search about profiles:

- Go to set up and click on home after that search for profiles in quick search box and click on it.

The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' is selected. Below it, the 'Users' section is open, and the 'Profiles' tab is highlighted with a red box. The main content area is titled 'Profiles' and shows a list of profiles. The first few entries are:

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Analytics Cloud Security User	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>

At the bottom left, it says '1-25 of 39' and '0 Selected'. At the bottom right, there are navigation links 'Previous' and 'Next' and a page counter 'Page 1 of 2'.

- In this page we can see all the available profile which is created in this org.
- When we have requirement to create a profile, we create **standard user** profile by cloning standard user. Because it has all permissions.

Steps to create new profile:

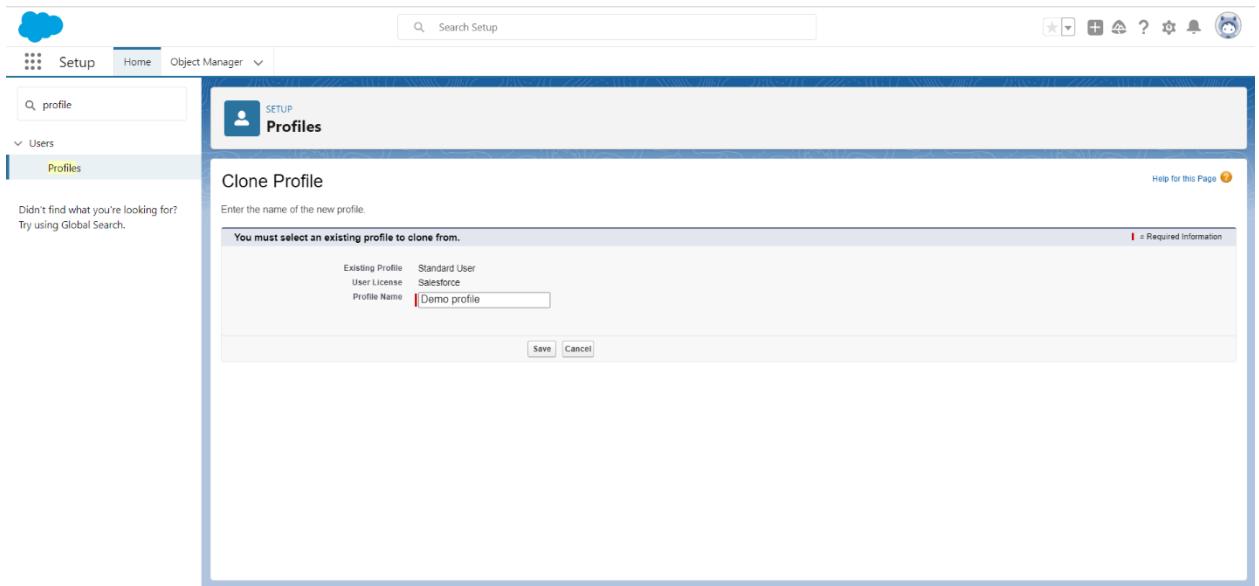
- Go to set-up and search profiles in Quick box. After that click on it.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Del Clone	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Del Clone	Custom: Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Del Clone	Custom: Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/> Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>

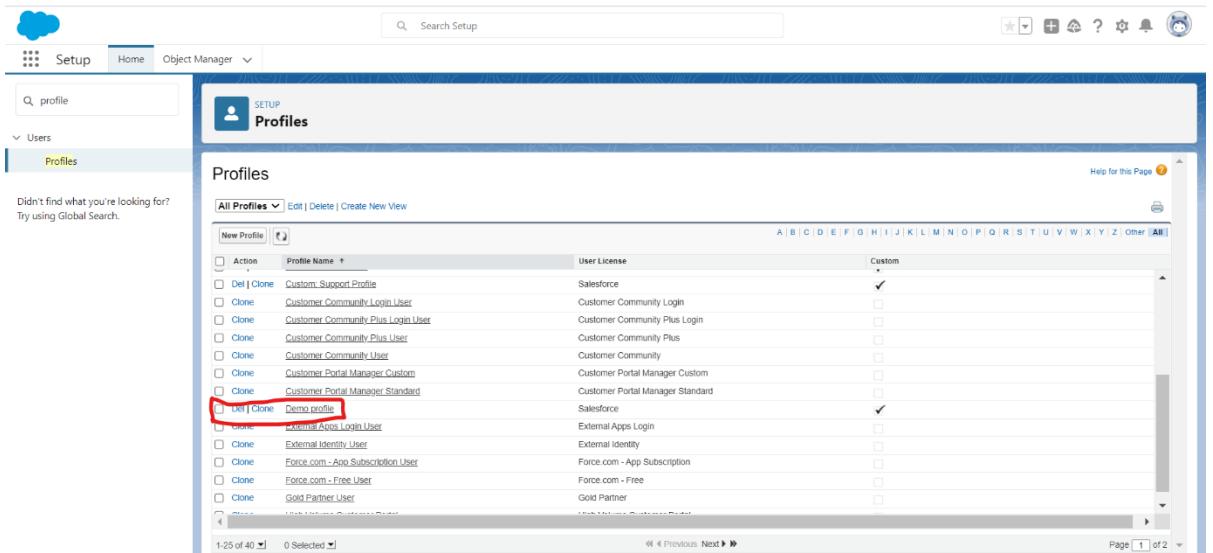
- After that click on S alphabet and search for **Standard users**. And click on Clone. When we want to create any profile just **clone** standard user don't edit any profile which is available.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Clone	Salesforce API Only_System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Clone	System Administrator	Salesforce	<input type="checkbox"/>

- After that enter profile name. and click on save.



- Now new profile is created. Click on profile again and search on list we will see created profile i.e., **Demo profiles**.



- Now click on Demo profiles. So, that we can see all permission inside this profile. And when this profile assigns to any user that user get all permission which is in that profile. When we click on **assigned user** button, we can see all user which is assigned to that particular profile.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar has a search bar and lists 'Users' and 'Profiles'. The main content area shows a profile named 'Demo profile'. Under 'Profile Overview', there are tabs for 'Description', 'User License' (set to 'Salesforce'), 'Last Modified By' (Zahid Khan, 04/10/2023, 3:57 pm), and 'Custom Profile' (checkbox checked). A red box highlights the 'Assigned Users' tab. Below this, the 'Apps' section is visible, containing several permission categories: 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings' (which is highlighted with a red box), 'App Permissions', 'Apex Class Access', 'Visualforce Page Access', and 'External Data Source Access'. A note at the bottom states: 'Settings that apply to Salesforce apps, such as Sales, and Customer Service built on the Lightning Platform'.

- now we can edit the read, write, edit, delete access of any object for this profile. We can Control the access of any of these setting. For example, we are edit object settings of newly created profile i.e., demo profile. For this click on click on object setting.

This screenshot is identical to the one above, showing the 'Profiles' page for the 'Demo profile'. The 'Object Settings' link under the 'Assigned Apps' section is highlighted with a red box. The rest of the interface, including the tabs and permission sections, remains the same.

- After that we get list of all objects in our org. Here, we are selecting Account object for and modify few permissions.

- After that click on edit button to edit the object permission and field permission.

- Now we uncheck the box of edit and delete because we don't want to give this access of account object for this profile. Only create and read access give this profile.

- We can also modify edit and read permission of any field of that object. In field level permission we have 2 options edit access and read access.
 - I. If uncheck both boxes so that fields won't be visible in object.
 - II. If we checked read access box so this profile will have read access only.
 - III. If we checked edit access so this profile will have edit access only.
- Here we are taking example of Industry field in account object. We will give only read access of industry field to this profile.

Field Name	Read Access	Edit Access
Account Name	<input type="checkbox"/>	<input type="checkbox"/>
Account Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Owner	<input type="checkbox"/>	<input type="checkbox"/>
Account Site	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Source	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Annual Revenue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Billing Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Clean Status	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Created By	<input type="checkbox"/>	<input type="checkbox"/>
Customer Priority	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
D&B Company	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data.com Key	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Description	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
D-U-N-S Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Empl Einstein Account Tier	<input type="checkbox"/>	<input type="checkbox"/>
Employees	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Fax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Industry	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input type="checkbox"/>	<input type="checkbox"/>
NAICS Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>
NAICS Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Now click on save. Now what we made change will see here.

Permission Name	Enabled
Read	<input type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Name	Read Access	Edit Access
Account Name	<input type="checkbox"/>	<input type="checkbox"/>
Account Number	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	<input type="checkbox"/>	<input type="checkbox"/>
Account Site	<input type="checkbox"/>	<input type="checkbox"/>
Account Source	<input type="checkbox"/>	<input type="checkbox"/>
Active	<input type="checkbox"/>	<input type="checkbox"/>

- Now we are going to assign this demo profile to already created users i.e., test user.
- Again, search for users in quick search box. And click on it.
- After that click on edit on beside Test user name.

The screenshot shows the Salesforce Setup interface under the 'Users' section. The left sidebar lists various user management options like Permission Set Groups, Profiles, and Roles. The main area displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. One user, 'user.Test', is selected and highlighted with a red box.

- After that select demo profile in Profile section. And click on save.

The screenshot shows the 'User Edit' page for a user named 'Test user'. The 'Profile' dropdown menu is open, showing 'None Specified' as the current selection and 'Demo profile' highlighted with a red box as the available option.

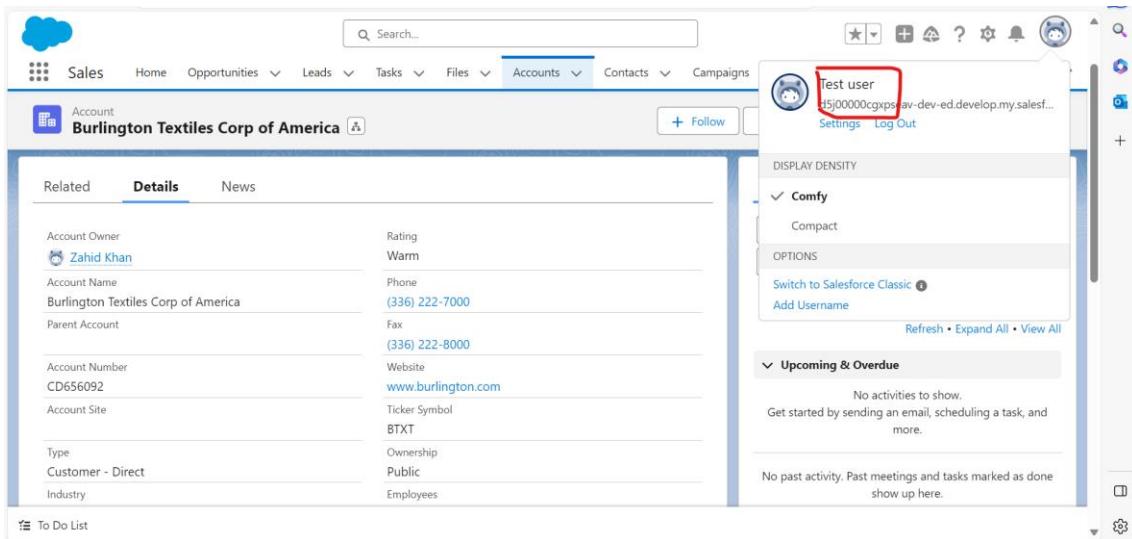
- Now demo profile is assigned to the test user and all the permissions set in that profile is apply on test user.
- We can also check in assigned user list of demo profile. For this, search for profile in quick search and click on it.
- After that find demo profile and click on it.
- After that click on assigned users.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The 'Demo profile' is displayed. In the 'Profile Overview' section, there is a 'Assigned Users' button which is highlighted with a red box. Below this, there are sections for 'Apps' and various app settings like 'Assigned Apps', 'Assigned Connected Apps', etc.

- after that we will see all the assigned user of this profile.

The screenshot shows the Salesforce Setup interface with the 'Users' page selected for the 'Demo profile'. A user record named 'user.Test' is selected and highlighted with a red box. The user details shown are: Full Name: user.Test, Alias: user, Username: zahidis4@zk.in, Role: Active, Profile: Demo profile.

- Now go to another browser and login for test user using username and password.
- After that go to account objects in sales sab see the access what we set in demo profile.
- Open any records to see the changes.



- Here we can see that edit button(pencil) is not visible because we disable this for test user.

Permission sets

- When we have a requirement that we have 2 users. Users A and users B, we want to give read and create access to user A. we want to give edit and delete access to user B. for this scenario we can create 2 different profiles, but this approach is not good. for this type of scenario, we have to use **permission sets**.
- A permission set is a collection of settings and permissions that give user access to various tools and functions.
- Permissions sets extend users functional access without changing their profile.
- Through permissions sets permission can be granted and any time it can be taken away as well.
- Users can have only one profile, but they can have multiple permission sets assigned.

Steps to create permission sets:

- Go to set-up and search for **permissions set** in Quick search box. And click on it.
- In permission set we don't have to clone like profile. We can create new permissions set by clicking on new button.

The screenshot shows the 'Permission Sets' page in the Salesforce setup. The 'Permission Sets' tab is selected. A red box highlights the 'New' button at the top left of the list table. The table lists various permission sets with columns for Action, Permission Set Label, Description, and License.

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products and categories, make...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts and or...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
<input type="checkbox"/> Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Connect a...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that use ...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/> Del Clone	Experience Profile Manager	Salesforce	Salesforce
<input type="checkbox"/> Clone	Facility Manager	Lets users create, read, edit, and delete locations, sublocations, queued ...	Facility Manager
<input type="checkbox"/> Clone	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mobile app. Set t...	Field Service Mobile
<input type="checkbox"/> Clone	Merchandise	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seats
<input type="checkbox"/> Clone	Order Management Agent	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/> Clone	Order Management Operations Manager	Access to all features enabled by Order Management	Lightning Order Management User

- After that enter label, Api name will be automatically filled and choose license as salesforce. And click on save.

The screenshot shows the 'Create Permission Set' dialog. The 'Label' field is set to 'Demo PS' and the 'API Name' field is set to 'Demo_PS'. The 'Save' button is visible at the bottom right.

- Permission set will be adding the permissions. We can't revoke permissions through permissions set.
- After creating permissions set can edit access of any object and fields.
- Here, we are editing object Settings. So, click on object settings.

- after that we can see that whole objects of org. but don't have any access of any object. So, we have to edit the access of the object. For example, we are taking **account object**.
- Click on Account object. After that click on edit button.

- Here, we can enable read, write, create, and delete access on account object and we can also give read and edit access of any field.
- If any box is checked in profile but unchecked in permission sets so that user have the access to that check box in profile. It can't be revoked.
- We are checked the box of read, edit, and delete. And create box will be unchecked because it already checked in profile. In permissions sets we do any add-on of the permissions.
- In field permissions, we are giving edit and read access to these permissions to industry field. In profile, we didn't give read and edit access of the industry field. So when we give access from permission set the user get the access.

The left screenshot shows the initial state where 'Enabled' is checked for all object permissions. The right screenshot shows the 'Field Permissions' section where the 'IsReady' field has its 'Edit Access' checkbox checked and is highlighted with a red box.

- After that click on save.
- Now we are assigning this permission set to test user. For this we can assign this permission set using 2 ways 1st like we assign profile to user. And 2nd just click on manage assignment.

The screenshot shows the 'Manage Assignments' button highlighted with a red box. Below it, the 'Accounts' tab is selected under 'Object Settings'.

- After that click on Add assignment.

The screenshot shows the 'Add Assignment' button highlighted with a red box. The page title is 'Demo PS'.

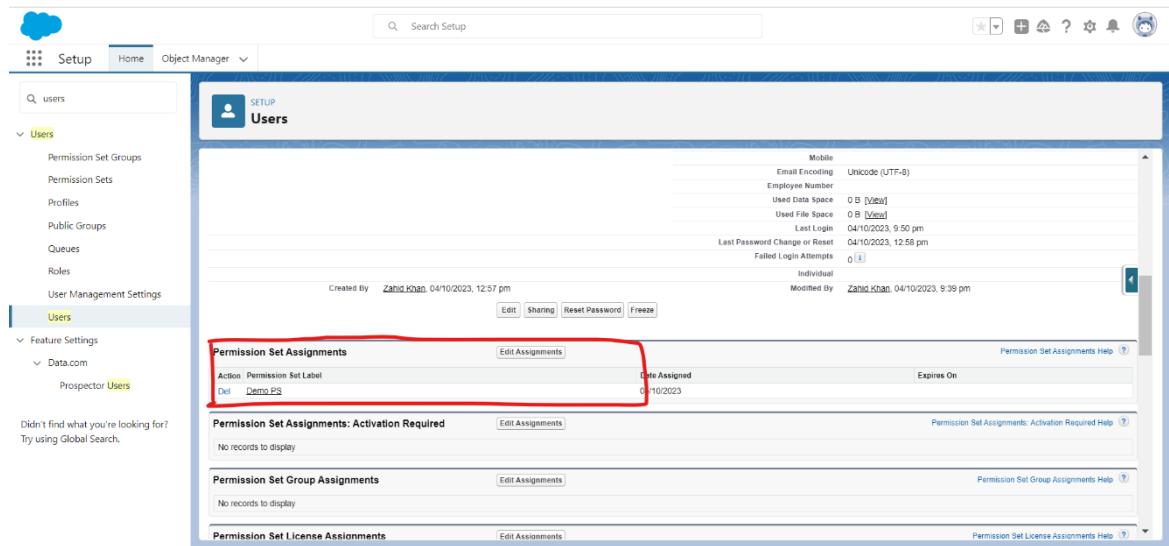
- After that we will see the All-user name. we can select according to our requirements. For example, we are selecting test user.

The screenshot shows the 'Select Users to Assign' interface in Salesforce. On the left, there's a sidebar with 'Setup', 'Home', and 'Object Manager'. Below that, it says 'Users' and 'Permission Sets'. A note says 'Didn't find what you're looking for? Try using Global Search.' The main area is titled 'All Users' and shows a list of users with columns for 'Full Name', 'Alias', 'Username', 'Role', 'Active', and 'Profile'. The user 'Test user' is highlighted with a red box. At the bottom right of the main area, there are 'Cancel' and 'Next' buttons.

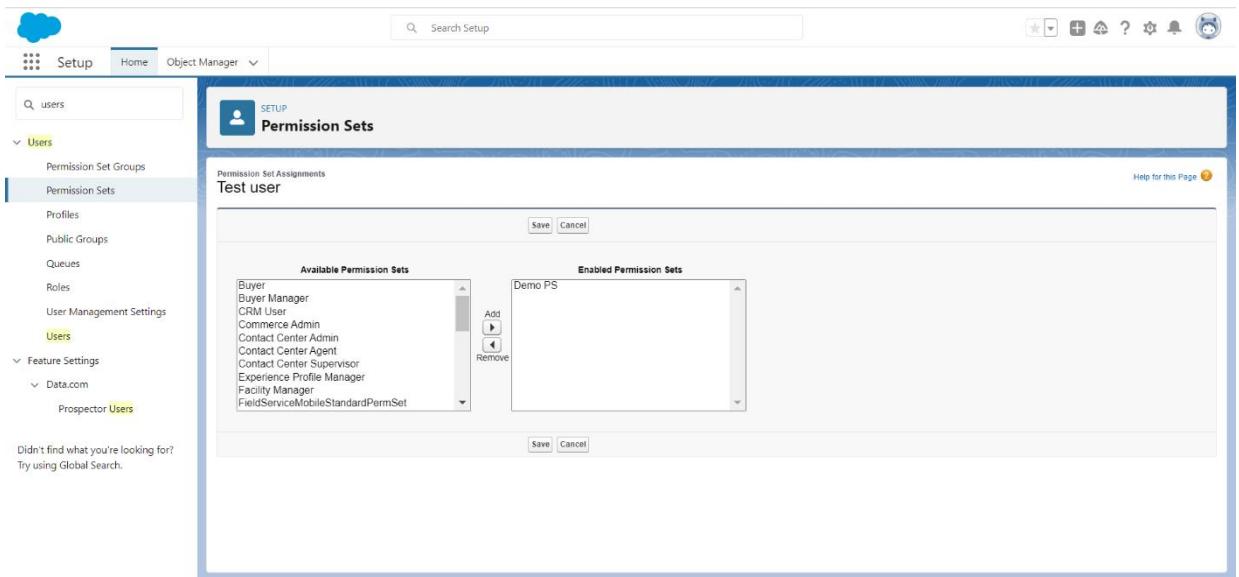
- Now select the test user and click on next.
- We can give expiration date and time date.
- Now click on assign. And click on done.

The screenshot shows the 'Manage Assignment Expiration' page for a permission set named 'Demo PS'. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main content area is titled 'Select an Expiration Option For Assigned Users' and contains two radio button options: 'No expiration date' (selected) and 'Specify the expiration date'. Below this are buttons for '1 Day', '1 Week', '30 Days', '60 Days', and 'Custom Date'. To the right, there's a 'Time Zone' dropdown with the placeholder 'Select a time zone...'. At the bottom, there's a table titled 'Selected Users' with columns for 'Full Name', 'Role', 'Profile', 'Active', 'User License', and 'Expires On'. The user 'Test user' is listed with 'Demo profile' and 'Salesforce' under 'User License'. The 'Expires On' column shows 'Never Expires'. At the very bottom right, there are 'Back' and 'Assign' buttons, with 'Assign' being highlighted with a red box.

- Now search for users in quick box. Click on Test user. After that scroll down we will see demo PS in permission set assignment.



- If we want to add another permission set to this user, then click on Edit assignment and select the permissions set and click on add button. And click on save. So that permissions set will be add on that user.



Steps to delete permission set from any user:

- We can delete the permission set from any users from User.
- To do this search for user in quick search and click on it. After that click on the user from which permission set need to be delete. Here, we are selecting test user because we have only user in free license.

All Users

On this page you can create, view, and manage users.

In addition, download Salesforce to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices. [iOS | Android](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chan/005100000cpxseav/crmsvorokha@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
Edit	Z Khan	Zkhan	zahidels4@cognizant.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
Edit	User Integration	integ	integration/005100000cpxseav.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User Security	sec	insightssecurity/005100000cpxseav.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User
Edit	user test	user	zahidels4@zk.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Demo profile

- After that scroll down we will get permission set assignment. Beside permission set name there is a del option just click on this.

Extension
Fax
Mobile
Email Encoding
Employee Number
Used Data Space
Used File Space
Last Login
Last Password Change or Reset
Failed Login Attempts

Created By Zahid Khan, 04/10/2023, 12:57 pm Modified By Zahid Khan, 04/10/2023, 9:39 pm

Individual

Permission Set Assignments

Action	Permission Set Label	Date Assigned	Expires On
Del	Demo PS	05/10/2023	06/10/2023
Del	Demo Two PS	05/10/2023	06/10/2023

Permission Set Assignments: Activation Required

No records to display

Permission Set Group Assignments

- After clicking on del that permission set will be deleted from that user.