

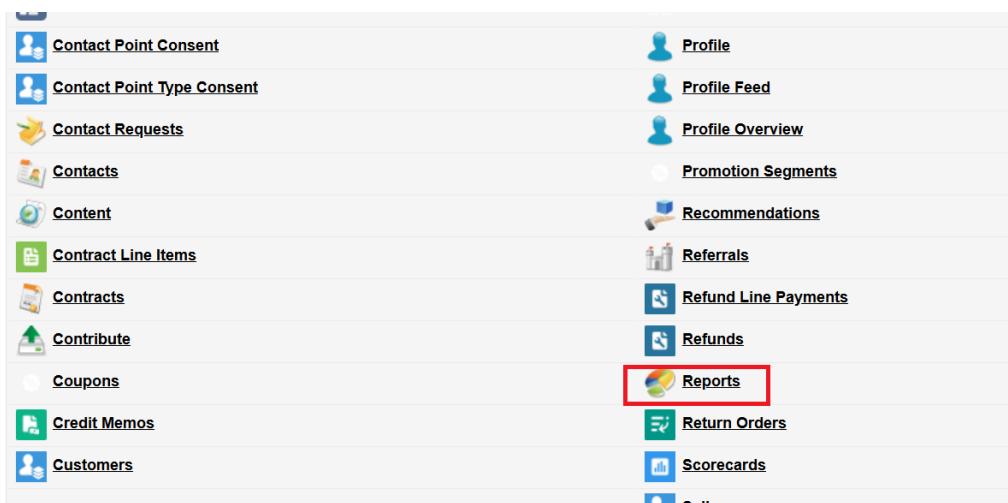
Date: 27-05-2026

Assignment 5: Summary report - Conditional Highlighting

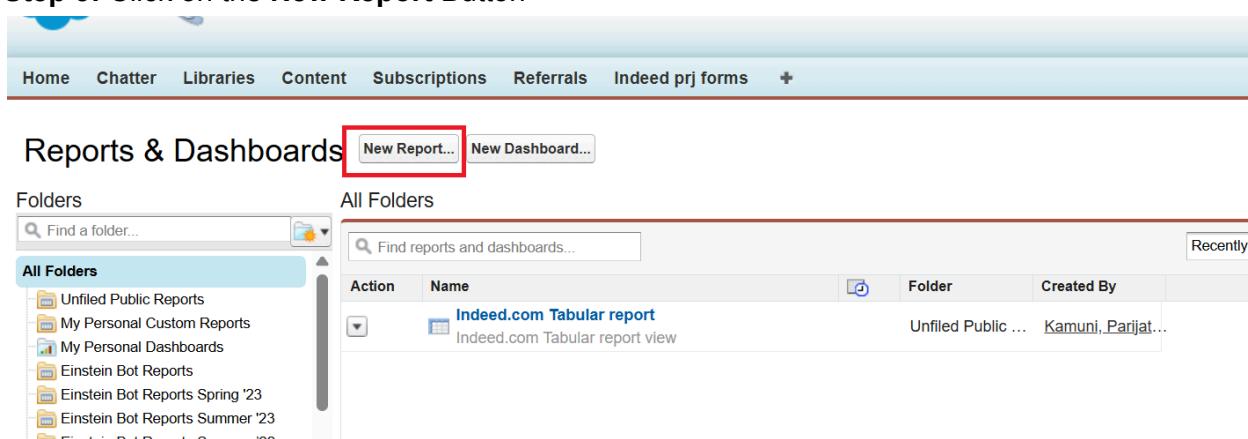
How to use conditional highlighting in the summary report. By default, it is not visible that we have to do something to activate/enable conditional highlighting in summary reports.

Step 1: Go to Classic View

Step 2: Select Reports Object



Step 3: Click on the New Report Button



Step 4: Expand Other Reports for Custom Object

Step 5: Select the Custom Object (Indeed prj forms)

Step 6: Click on the Create Button

Create New Report

The screenshot shows the 'Create New Report' page. At the top, there is a checkbox labeled 'Select Report Types to Hide' with a help icon. Below it is a section titled 'Select Report Type' with a 'Quick Find' input field. A list of report categories is shown, with 'Other Reports' expanded, revealing four specific report types: 'Indeed prj forms', 'Orchestration work items Spring '24', 'Orchestration Run Logs Spring '24', and 'Orchestration Stage Runs Spring '24'. The 'Create' button at the bottom right is highlighted with a red box. To the right, a 'Preview' section displays a table titled 'Account Report' with three rows of sample data.

Account	Owner	Account Name	Account Site
Joe Johnson	Acme, Inc	Headquarters	
Shelly Smith	Genwatt, Inc	Headquarters	
Tom Thompson	Gene Points	Headquarters	

Step 7: Save the Report. Click on the Save Button

The screenshot shows the 'Summary report data' screen. At the top, it says 'Report Type: Indeed prj forms' and 'Summary report data'. Below that is a toolbar with 'Save' (highlighted with a red box), 'Save As', 'Close', 'Report Properties', 'Add Report Type', and 'Run Report'. The main area has tabs for 'Fields' (selected) and 'Filters'. Under 'Fields', there is a 'Quick Find' input field and a list of fields: 'Bucket Fields' (with 'Add Bucket Field'), 'Indeed prj form: Info' (with 'Indeed prj form: ID', 'Indeed prj form: Indeed prj fc', 'Country', and '# Expected Salary'), and 'Indeed prj form: Indeed prj form Name'. Under 'Filters', there is a 'Show' dropdown set to 'My indeed prj forms', a 'Date Field' dropdown set to 'Passport Submission', and a date range from 'All Time' to 'To'. At the bottom, there is a 'Preview' section with 'Tabular Format' selected, 'Show' dropdown, and 'Remove All Columns' button.

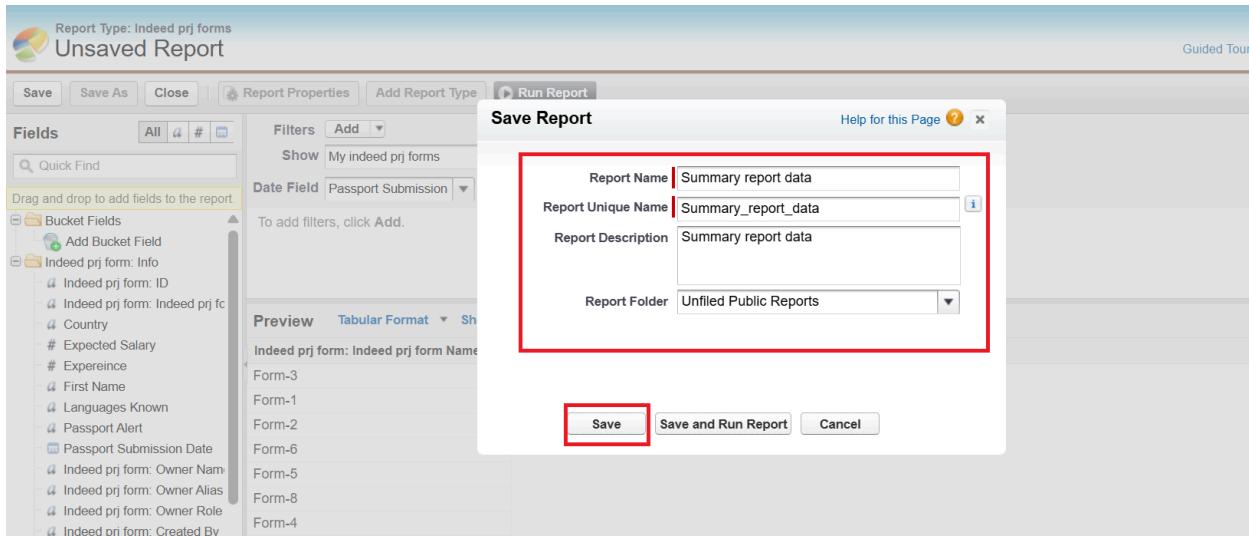
Step 8: Type the Report Name

Step 9: Unique Name will be auto-populated

Step 10: Enter Description

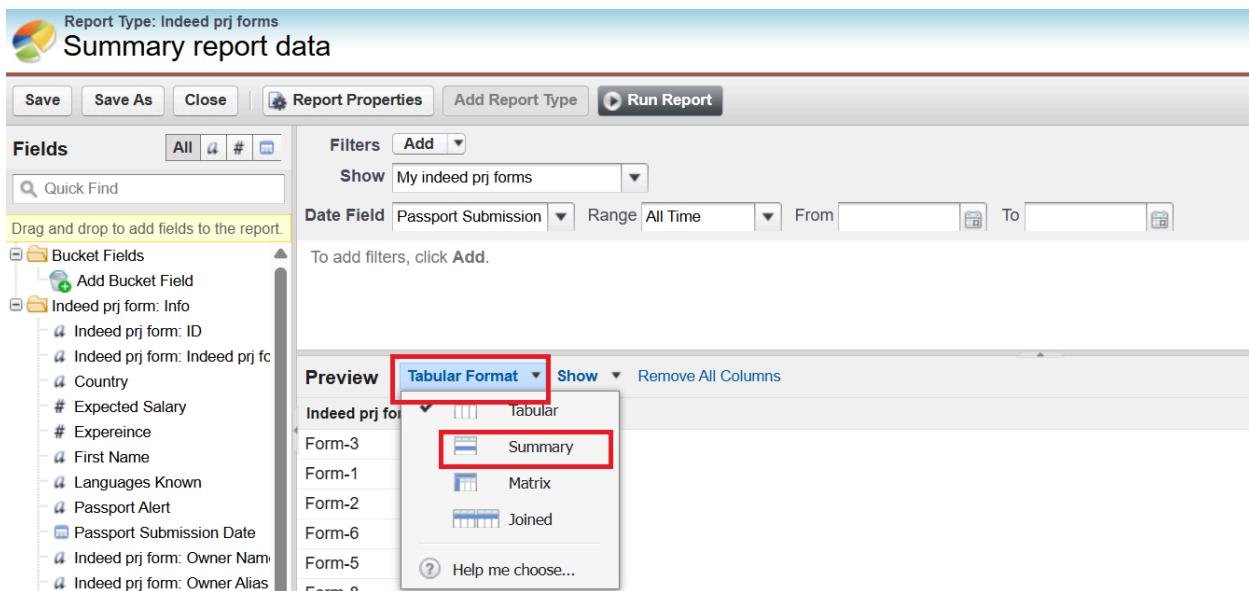
Step 11: Select Unfiled Public Reports

Step 12: Save the Report. Click on the Save Button



Step 13: Click on the **Tabular Format** Dropdown

Step 14: Select the **Summary** Report



Step 15: Double-click the Fields you want to display in the report from the Left pane, and the field will be added. (Expected Salary, Experience, FirstName, Languages Known)

Report Type: Indeed prj forms
Summary report data

Save Save As Close Report Properties Add Report Type Run Report

Fields All #

Filters Add Show My indeed prj forms Date Field Passport Submission Range All Time From To

To add filters, click Add.

Preview Summary Format Show Add Chart Remove All Columns

Indeed prj form: Indeed prj form Name

Drop a field here to create a grouping. Hide

Form-3	Form-1	Form-2	Form-6	Form-5	Form-8	Form-4	Form-7

Step 16: Drag and drop the required field (**Country Field**) at the “**Drop a field here to create a grouping**” section for Grouping

Report Type: Indeed prj forms
Summary report data

Save Save As Close Report Properties Add Report Type Run Report

Fields All #

Filters Add Show My indeed prj forms Date Field Passport Submission Range All Time From To

To add filters, click Add.

Preview Summary Format Show Add Chart Remove All Columns

Expected Salary	Expereince	First Name	Languages Known
Country: - (4 Records)			
Drop a field here to create a grouping. Hide			
-	- John	-	
-	- John	-	
-	- John	-	
\$10,000	4 kiran	APEX	
Country: IND (1 Record)			
\$4,000	10 John	Java	
Country: UK (1 Record)			

Step 17: Click on the Number Field (Conditional highlighting can be done for Number fields only). **ADDING A SUMMARY FIELD IS MANDATORY TO ENABLE THE CONDITIONAL HIGHLIGHTING OPTION**

(Conditional highlighting only works on summary values. If you don't summarize a number field, the highlighting option won't appear.)

The screenshot shows a report builder interface with a sidebar containing various fields like Formulas, Bucket Fields, and Indeed prj form: Info. In the main area, there's a table with columns: Expected Salary, Experience, First Name, and Languages Known. A context menu is open over the 'Experience' column, listing options: Sort Ascending, Sort Descending, Group by this Field, Summarize this Field..., Bucket this Field..., and Remove Column. The 'Summarize this Field...' option is highlighted with a red box.

Step 18: Select the summary (SUM, AVG, MAX, MIN) and click on the **Apply** button. This is the field that will get the color highlighting.

You must have at least one summarized numeric field in the report, like **SUM, AVERAGE, MIN, or MAX** on a number field.

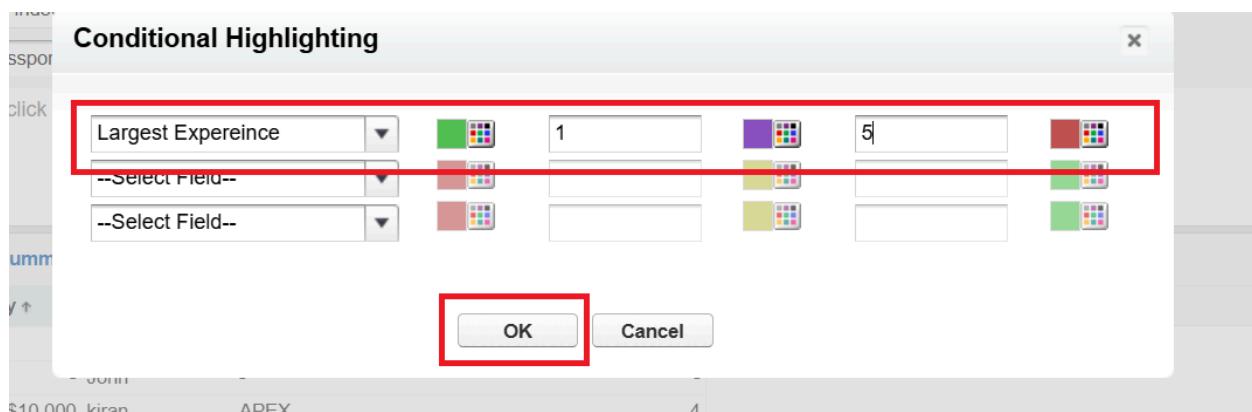
The screenshot shows a 'Summarize' dialog box with a red border. It has a table where 'Expereince' is listed under 'Field'. The 'Max' checkbox is checked. At the bottom are 'Apply' and 'Cancel' buttons. The background shows a portion of the report builder interface with a table and a grouping panel.

Step 19: Select Show Dropdown and Select Conditional Highlighting

The screenshot shows the 'Summary report data' interface. On the left, there's a sidebar with 'Fields' and a 'Quick Find' search bar. The main area has 'Filters' and a 'Show' dropdown set to 'My indeed prj forms'. Below it, a 'Date Field' is set to 'Passport Submission' with a range from 'All Time' to 'To'. A note says 'To add filters, click Add.' In the center, there's a preview table with columns 'Expected Salary' and 'First Name'. The 'Show' dropdown menu is open, highlighting 'Conditional Highlighting...'. Other options in the menu include 'Details' and 'Drop Zones'. The preview table shows data for 'Country: IND (1 Record)' and 'Country: UK (1 Record)'. The preview table has a red border around its top section.

Step 20: Select the **experience** that you want to highlight, and also choose the conditions like Low, Medium, High, and pick the Colors to highlight

Step 21: Click on the **OK** Button



Step 22: Click on the **Run Report** Button to see the result, and click on the **Save** Button

If Min Exp is 0 is Green color

If Exp is < 5 is Purple color

If Exp > 5 is Red Color

The screenshot shows a Salesforce report titled "Summary report data". The report generation status is "Complete". The report options include summarizing by "Country" and showing "My indeed prj forms". The time frame is set to "Custom" from "Passport Submission Date". The report is grouped by "Country" and sorted by "Country". The data table includes columns for "Expected Salary", "First Name", "Languages Known", and "Expereince". The report displays 8 records across 4 countries: IND (1 record), UK (1 record), CAN (1 record), and AUS (1 record). The "Expereince" column uses color coding: purple for values between 0 and 5, red for values greater than 5, and green for values less than 0 (which is not visible in the screenshot). The report also includes a "Grand Totals" row for all 8 records.

Country	First Name	Languages Known	Expereince
IND (1 record)	\$4,000 John	Java	10
UK (1 record)	\$40,000 Master	Dotnet	15
CAN (1 record)	\$30,000 mary	CPP	0
AUS (1 record)	\$50,000 peter	PHP	5
Grand Totals (8 records)			max 15 min 0