

ASSIGNMENT 6: Create Custom Report Type with below objects

Customer wants you to create a report based on the data of below objects:

Account (Primary Object)

Case

Case Feed

Comment

(data may not come in report, that's totally fine as these are standard objects, not our objects)

And relationship type needs to be : "A" records may or may not have related "B" records.

But this type of report is not present in "Standard Report Type".

So provide a solution on this to client.

(Hint: Custom Report Type)

Result

The screenshot shows the Salesforce Setup interface with a yellow border. At the top, there are tabs: 'Setup' (highlighted), 'Home', and 'Object Manager'. Below the tabs is a search bar with 'report' typed in. On the left, there's a sidebar with sections like 'Feature Settings' (Analytics, Reports & Dashboards, Report Types, Reporting Snapshots, Reports and Dashboards, Settings), 'Security' (Guest User Sharing Rule Access, Report), and a note: 'Didn't find what you're looking for? Try using Global Search.' The main area has three panels: 'Details' (Display Label: 'my custom report', API Name: 'my_custom_report', Description: 'my custom report', Created By: 'Parijatha Kamuni, 6/10/25, 12:12 AM', Store in Category: 'other', Deployment Status: 'Deployed', Modified By: 'Parijatha Kamuni, 6/10/25, 12:12 AM'), 'Fields' (Source Object: Accounts (61), Cases (37), Case Feed (15), Comments (15)), and 'Object Relationships' (Accounts (A) with at least one related record from Cases (B), Case Feed (C), and Comments (D)). A Venn diagram illustrates the relationship types: A (Accounts) overlaps with B (Cases), C (Case Feed), and D (Comments). Below the diagram, four colored boxes labeled A, B, C, and D represent the objects involved in the relationships.

The screenshot shows the Salesforce Reports interface. The top navigation bar includes links for Home, Reports (which is highlighted with a red box), Indeeds, Indeed prj forms, and Chatter. Below the navigation is a search bar and a 'REPORT' section with a 'New my custom report Report' button. The main content area is titled 'my custom report'. On the left, there's a sidebar with sections for Summary Formulas (0), Accounts (60), Cases (28), Case Feed (14), and Comments (15). The main panel has an 'Outline' tab selected, showing 'Groups' and 'GROUP ROWS' with an 'Add group...' button. Under 'Columns', there are buttons for 'Add column...', 'Account Name', and 'Case Number'. A table on the right lists 13 rows of account data:

	Account Name	Case Number
1	United Oil & Gas Corp.	00001001
2	Edge Communications	00001000
3	United Oil & Gas Corp.	00001002
4	Express Logistics and Transport	00001003
5	Express Logistics and Transport	00001004
6	Express Logistics and Transport	00001005
7	GenePoint	00001006
8	Grand Hotels & Resorts Ltd	00001007
9	Grand Hotels & Resorts Ltd	00001008
10	United Oil & Gas, UK	00001009
11	United Oil & Gas, Singapore	00001010
12	United Oil & Gas, Singapore	00001011
13	University of Arizona	00001012

ASSIGNMENT 7: Create Skills segment Bucket Field

Intelogik Project Problem: (staffing company -- we saw demo)

On the same object which u have already
create a new field of type picklist called as "Skill".

In that field, as per client need, we need to provide below technologies.

Dotnet (segment = System & Web Skill)
Java (segment = System & Web Skill)
Azure (segment = Cloud Skill)
Salesforce (segment = Cloud Skill)
AWS (segment = Cloud Skill)
Java Script (segment = Scripting Skill)
Angular JS (segment = Scripting Skill)
React J (segment = Scripting Skill)

As customer needs a report to see, for which segment there is huge demand and low demand, he wants u to prepare a summary as per Segments, and not as per Technology.

(Hint: Take help of Bucket field)

Result

Report: Indeed prj forms
Skills Bucket field

	Segments ↑	Expected Salary ↓	Expereince ↓	Languages Known ↓	First Name ↓	Skill ↓
		\$4,000	1U	Java	Jonn	-
		\$30,000	0	CPP	mary	-
		\$134,000	34			
Subtotal						
					John	Dotnet
					kiran	Java
					lohith	Salesforce
					vijay	Azure
					sony	AWS
					babu	AWS
Subtotal		\$0	0			
					sagar	Javascript
					sushmitha	Angular Js
Subtotal		\$0	0			
Total (16)		\$134,000	34			

Indeed.com Home Reports Indeed prj forms Chatter

REPORT ▾ Skills Bucket field / Indeed prj forms

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

Update Preview Automatically

Fields > Outline Filters Preview a limited number of records. Run the report to see everything.

Groups GROUP ROWS Add group... Segments

Segments GROUP COLUMNS Add group...

Columns # Expected Salary # Expereince Languages Known First Name

Record Count

Segments ↑	Expected Salary ↓	Expereince ↓	Languages Known ↓	First Name ↓	Skill ↓
- (8)	-	-	-	John	-
	-	-	-	John	-
	-	-	-	John	-
	\$10,000	4	APEX	kiran	-
	\$40,000	15	Dotnet	Master	-
	\$60,000	5	PHP	peter	-
	\$4,000	10	Java	John	-

Segments Cloud Skill Scripting Skill System & Web Skill

Assignment 8: 30-05-2025 FULL report and dashboard mini project/task

1. Batch..

Create a object called Computer.

2.

Create fields:

Name (Type: Text)

Price (Type: Currency)

Brand (Type: Picklist)

Weight (Type: Number)

3.

Create a Tabular report for showing:

Name

Price

Brand

Weight

Created Date

4.

Create a Summary report for showing: (grouping field is

Brand)

Name

Price

Brand

Weight

Created Date

5.

Create a Matrix report for showing: (grouping by Price

and Brand)

Name

Price
Brand
Weight
Created Date

6.

Create a Joined report having these blocks: (Grouping by Weight and Price)

Name,Price
Brand,Weight
Name,Created Date

7.

Create a pie chart for above summary report.

8.

Create bar chart for above matrix report.

9.

Create a bucket field for above Tabular report where bucketing is done on Brand.

Bucketing region: USA, Korea, Japan

Dell - USA

Samsung - Korea

Microsoft - USA

IBM - USA

Hitachi - Japan

Canon - Japan

Toshiba - Japan

10.

Add above Summary report chart on dashboard.

11.

Add above Matrix report chart on dashboard.

12.

Add above Tabular report on dashboard.

13.

Add above Joined report on dashboard.

14.

Filter dashboard with price above 1000.

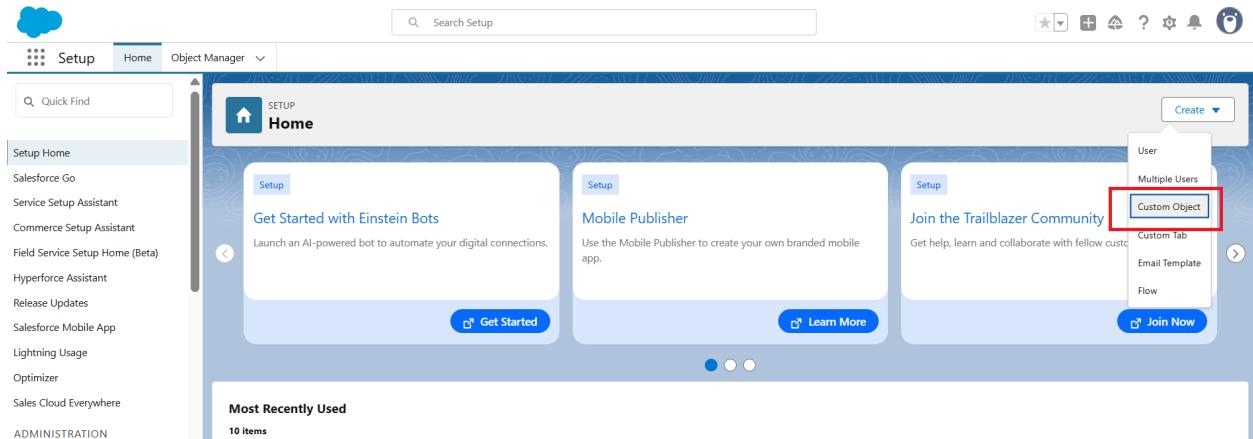
15.

Create a Scheduled report for the above tabular report on every Monday.

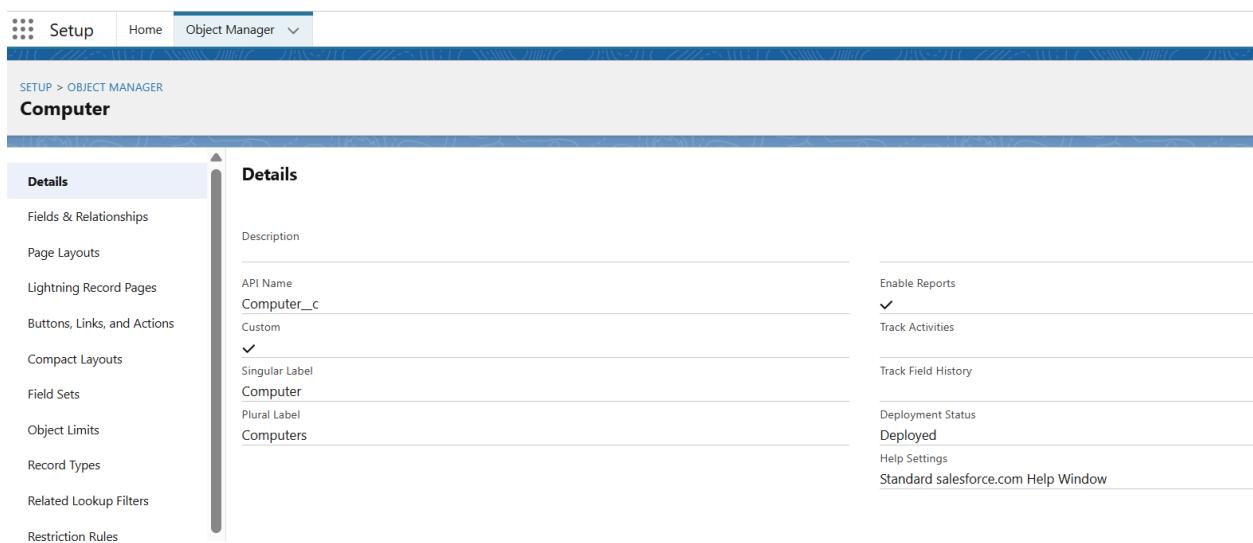
16.

Create grouping of computer as per the brand and show max price per brand
(hint: Using Formula)

1. Create Object “computer”



The screenshot shows the Salesforce Setup Home page. In the top right corner, there is a 'Create' dropdown menu. A red box highlights the 'Custom Object' option under the 'User' section of this menu.



The screenshot shows the Salesforce Object Manager page for the 'Computer' object. The left sidebar lists various object management options like Fields & Relationships, Page Layouts, and Buttons, Links, and Actions. The main details panel shows the API Name 'Computer__c', which is highlighted with a red box. Other details include Custom status checked, Singular Label 'Computer', Plural Label 'Computers', and deployment status 'Deployed'.

Create fields in the object “computer”

New Computer

* = Required

Information

* Name

Owner



Price

Brand

Weight

[Cancel](#)

[Save & New](#)

[Save](#)

Nothing to see here

Create Tabular Report



Indeed.com

Home

Reports

Indeeds

Indeed prj forms

Chatter

Dashboards

Computers



Report: Computers

Tabular report



Report "New Computers Tabular Report" was saved

Total Records Total Price Total Weight
5 \$2,950,000 11

	Computer: Name	Price	Brand	Weight	Computer: Created Date
1	A4	\$1,000,000	Mac	2	2025-07-19
2	A1	\$425,000	Dell	2	2025-07-19
3	A2	\$500,000	Lenovo	3	2025-07-19
4	A3	\$600,000	HP	3	2025-07-19
5	A5	\$425,000	Acer	2	2025-07-19
6		\$2,950,000		11	

Create a Summary Report showing (grouping field is Brand)

The screenshot shows a report titled "Report: Computers New Computers Summary Report" with the subtitle "Summary Report showing (grouping field is Brand)". The report header includes the Indeed.com logo and navigation links for Home, Reports, Indeeds, Indeed prj forms, Chatter, Dashboards, and Computers.

The summary table displays the following data:

Total Records	Total Price	Total Weight
5	\$2,950,000	11

The main data table has columns: Brand, Computer: Name, Price, Weight, and Computer: Created Date. It lists five brands (Dell, Lenovo, HP, Mac, Acer) with their respective details. Subtotals are shown for each brand, and a final total row is at the bottom.

	Brand ↑	Computer: Name	Price	Weight	Computer: Created Date
	Dell (1)	A1	\$425,000	2	2025-07-19
	Subtotal		\$425,000	2	
	Lenovo (1)	A2	\$500,000	3	2025-07-19
	Subtotal		\$500,000	3	
	HP (1)	A3	\$600,000	3	2025-07-19
	Subtotal		\$600,000	3	
	Mac (1)	A4	\$1,000,000	2	2025-07-19
	Subtotal		\$1,000,000	2	
	Acer (1)	A5	\$425,000	2	2025-07-19
	Subtotal		\$425,000	2	
	Total (5)		\$2,950,000	11	

Create a Matrix report showing (grouping by price and brand)



Report: Computers

New Computers matrix Report

Matrix report showing (grouping by price and brand)

Total Records Total Weight
5 11

Price	Brand	Dell	Lenovo	HP	Mac	Acer	Total
\$425,000	Sum of Weight Record Count	2 1	0 0	0 0	0 0	2 1	4 2
\$500,000	Sum of Weight Record Count	0 0	3 1	0 0	0 0	0 0	3 1
\$600,000	Sum of Weight Record Count	0 0	0 0	3 1	0 0	0 0	3 1
\$1,000,000	Sum of Weight Record Count	0 0	0 0	0 0	2 1	0 0	2 1

Details (5 Rows) i Click an intersection in the table above to filter details.

	Computer: Name	Weight	Computer: Created Date
1	A1	2	2025-07-19
2	A5	2	2025-07-19
3	A2	3	2025-07-19
4	A3	3	2025-07-19
5	A4	2	2025-07-19
6		11	

Create a Joined report showing (grouping by price and brand)



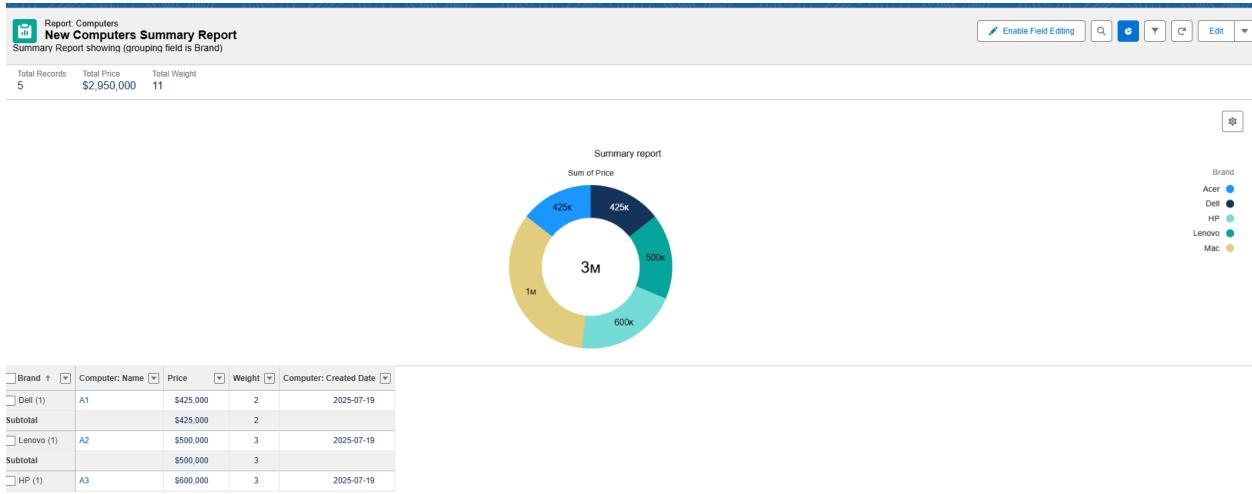
Report New Joined Report

[« Go to Report List](#)

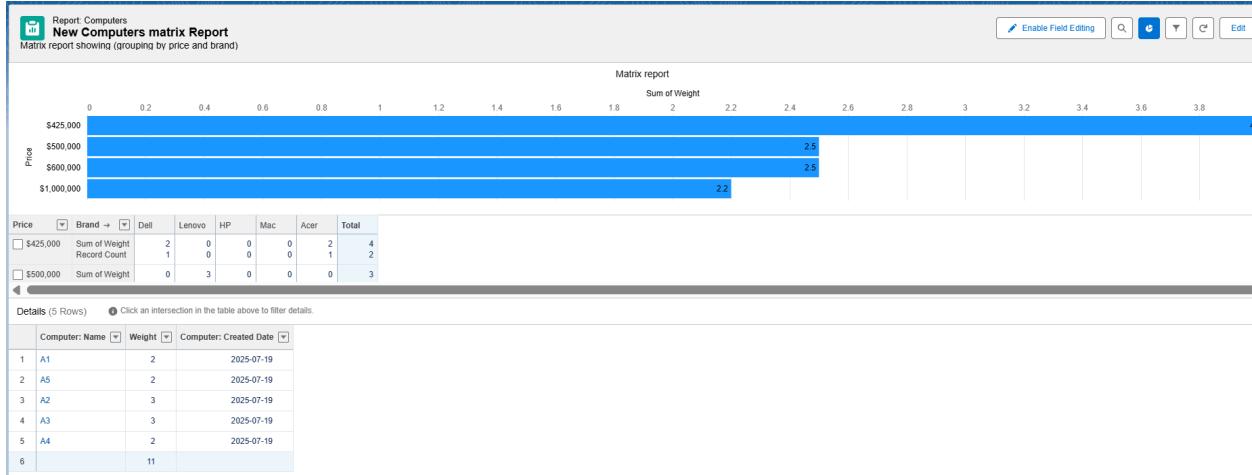
[Run Report](#) [Hide Details](#) [Report Properties](#) | [Save](#) [Save As](#) [Customize](#) [Delete](#) [Printable View](#) | Report genera

COMPUTERS Computers block 1	COMPUTERS Computers block 2	COMPUTERS Computers block 3	
Computer: Name	Brand	Computer: Created Date	Computer: Name
Weight: 2 (2 records)	(2 records)	(2 records)	
Price: \$425,000 (2 records)	(2 records)	(2 records)	
A1	Dell	2025-07-19	A1
A5	Acer	2025-07-19	A5
Weight: 2 (1 record)	(1 record)	(1 record)	
Price: \$1,000,000 (1 record)	(1 record)	(1 record)	
A4	Mac	2025-07-19	A4
Weight: 3 (2 records)	(2 records)	(2 records)	
Price: \$500,000 (1 record)	(1 record)	(1 record)	
A2	Lenovo	2025-07-19	A2
Price: \$600,000			

Create pie chart for summary report. (couldn't find summary report so choosed donut report)



Create a Bar chart for the Matrix report



Creating a bucket field for the above Tabular report, where bucketing is done in Brand.

Bucketing region: USA, Korea, Japan

Dell - USA

Samsung - Korea

Microsoft - USA

IBM - USA

Hitachi - Japan

Canon - Japan

Toshiba - Japan

Report: Computers
New Computers Tabular Report

Tabular report

Report "New Computers Tabular Report" wa

Total Records Total Price Total Weight
 8 \$4,475,000 18

	Computer: Name	Price	Brand	Weight	Computer: Created Date	Bucketing Region
1	A1	\$425,000	Dell	2	2025-07-19	Korea
2	A8	\$600,000	Dell	2	2025-07-19	Korea
3	A7	\$500,000	Samsung	3	2025-07-19	Korea
4	A5	\$425,000	Microsoft	2	2025-07-19	USA
5	A9	\$425,000	IBM	3	2025-07-19	USA
6	A4	\$1,000,000	Hitachi	2	2025-07-19	Japan
7	A3	\$600,000	Canon	3	2025-07-19	Japan
8	A2	\$500,000	Toshiba	3	2025-07-19	Japan
9		\$4,475,000		18		

Adding all reports in the dashboard

Indeed.com Home Reports Indeeds Indeed pjfs forms Chatter Dashboards Computers

Assignment Reports and Dashboard - 30-06-2025
 As of Jul 20, 2025, 1:50 a.m. Viewing as Parjatha Kamuni

New Computers Summary Report

Sum of Price: \$8.7k

[View Report \(New Computers Summary Report\)](#)

New Computers matrix Report

Price	Sum of Weight					
	0	0.5	1	1.5	2	2.5
\$200	2					
\$300		2.5				
\$500			2.5			
\$800				2		
\$900					2.5	
\$1,200						2.5
\$1,300					2	
\$1,500						2.5
\$2,000					2.2	

[View Report \(New Computers matrix Report\)](#)

New Joined Report

Computers block 1 - Record Count: 9

Weight: 2 (44.44%)

Weight: 3 (55.56%)

[View Report \(New Joined Report\)](#)

New Computers Tabular Report

Computer: Name	Price	Brand	Weight	Computer: Created Date
A1	\$1k	Dell	2	2025-07-19
A10	\$1k	Dell	3	2025-07-20
A4	\$2k	Hitachi	2	2025-07-19
A9	\$2k	IBM	3	2025-07-19

Filter the dashboard with price greater than 1000

Indeed.com Home Reports Indeed Indeed prj forms Chatter Dashboards Computers

Assignment Reports and Dashboard - 30-06-2025

New Computers Summary Report

Sum of Price
\$8.7K
\$2.7k
\$2k
\$1.5k
\$500
\$800

[View Report \(New Computers Summary Report\)](#)

New Computers Tabular Report

Computer Name	Price	Brand	Weight	Computer Created Date
A1	\$1k	Dell	2	2025-07-19
A10	\$1k	Dell	3	2025-07-20
A4	\$2k	Hitachi	2	2025-07-19

+ Widget X Filter Save D

Add Filter

* Select Field to Filter By (Required)
Price

Display Name
Price

Filter Values (0)
1 New Filter Value
Add Filter Value

Operator
greater than

Value
1000

Display Text
1000

Cancel Apply

Report
Computers block 1 - Record Count: 9
2
3
Joined Report

Indeed.com Home Reports Indeed Indeed prj forms Chatter Dashboards Computers

Assignment Reports and Dashboard - 30-06-2025

As of Jul 20, 2025, 1:45 a.m. Viewing as Parjatha Kamuni

Price
greater than 1000

All
greater than 1000

Sum of Price
\$6k
\$2.5k
\$2k
\$1.5k

[View Report \(New Computers Summary Report\)](#)

New Computers matrix Report

Sum of Weight
\$1,200 2.5
\$1,300 2
\$1,500 2.5
\$2,000 2.2

[View Report \(New Computers matrix Report\)](#)

You can't filter this component because data is in the joined report format. To filter the component, change its report format.

[View Report](#)

[Refresh](#) [Edit](#) [Subscribe](#)

New Computers Tabular Report

Computer Name	Price	Brand	Weight	Computer Created Date
A1	\$1k	Dell	2	2025-07-19
A10	\$1k	Dell	3	2025-07-20
A4	\$2k	Hitachi	2	2025-07-19

As of Jul 20, 2025, 1:45 a.m.

As of Jul 20, 2025, 1:45 a.m.

As of Jul 20, 2025, 1:45 a.m.

Create a scheduled report for the above Tabular report on every Monday

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New Computers Tabular Report

Report Generation Status: Complete

Report Options:

Summarize information by:

--None--

Show

My computers

Time Frame

Date Field

Computer: Created Date

Range

Custom

From

To

[Run Report](#)

[Hide Details](#)

[Customize](#)

[Save](#)

[Save As](#)

[Delete](#)

[Printable View](#)

[Export Details](#)

[Subscribe](#)

[Run Report Now](#)

[Schedule Future Runs...](#)

Filtered By: [Edit](#)

Price greater than "\$1,000" [Clear](#)

Computer: Name	Price	Brand	Weight	Computer: Created Date	Bucketing Region
A1	\$1,300	Dell	2	2025-07-19	Korea
A10	\$1,200	Dell	3	2025-07-20	Korea
A9	\$1,500	IBM	3	2025-07-19	USA
A4	\$2,000	Hitachi	2	2025-07-19	Japan

Grand Totals (4 records)

\$6,000

9



New Computers Tabular Report

Schedule Report [Save Report Schedule](#) [Cancel](#)

Running User

Email Report To me To me and/or others...

Schedule Report

Frequency	<input type="radio"/> Daily <input checked="" type="radio"/> Weekly <input type="radio"/> Monthly	Recur every week on
Start	<input type="text" value="2025-07-20"/> [2025-07-20]	<input type="checkbox"/> Sunday
End	<input type="text" value="2025-08-20"/> [2025-07-20]	<input checked="" type="checkbox"/> Monday
Preferred Start Time	Find available options...	
Exact start time will depend on job queue activity.		

Save Changes Save report modifications with this schedule
 Discard report modifications

[Save Report Schedule](#) [Cancel](#)