

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 displays the Salesforce Setup interface for configuring a custom report type. The left sidebar shows the navigation menu with 'Report Types' highlighted under 'Reports & Dashboards'. The main content area is divided into three sections: Details, Fields, and Object Relationships.

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 Categ...: other
- Deployment St...: Deployed
- Modified By: Parijatha Kamuni, 6/10/25, 12:12 AM

Fields:

Source Object	Included Fields
Accounts	61
Cases	37
Case Feed	15
Comments	15

Object Relationships:

Accounts (A)

- with at least one related record from Cases (B)
- with at least one related record from Case Feed (C)
- with at least one related record from Comments (D)

The diagram shows four overlapping circles labeled A, B, C, and D, representing the relationships between the objects. Below the diagram is a table with columns A, B, C, and D, each containing a list of field icons.

Indeed

Search...

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REPORT

New my custom report Report my custom report

Search all fields...

Outline Filters 2

Summary Formulas (0)

Create Formula

Accounts (60)

Cases (28)

Case Feed (14)

Comments (15)

Groups

GROUP ROWS

Add group...

Columns

Add column...

Account Name

Case Number

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

	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)

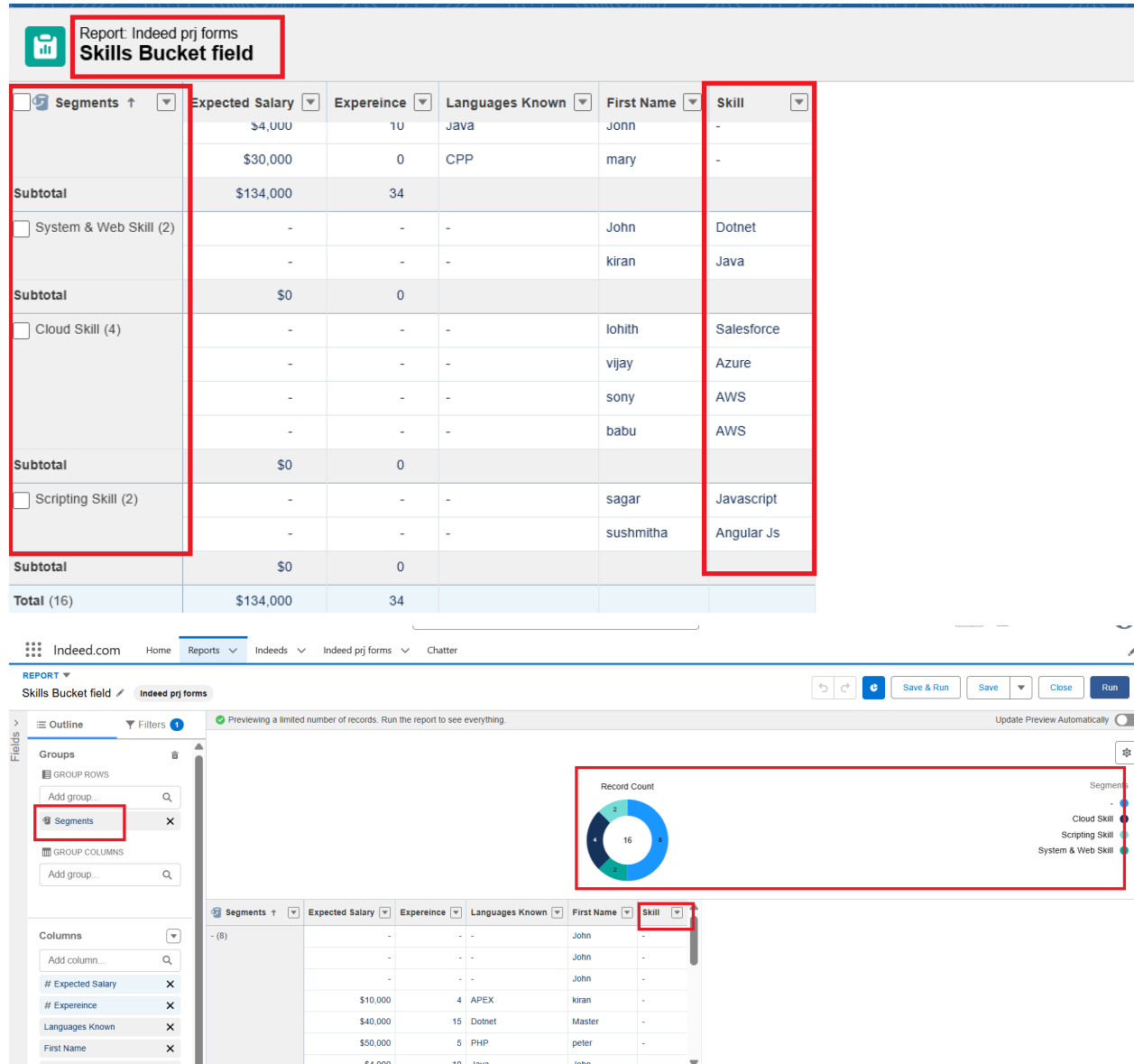
Angular JS (segment = Scripting Skill)

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



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

1 Batch..

1.
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 interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar is present. The left sidebar lists various setup options. The main content area shows the 'Home' page with cards for 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Join the Trailblazer Community'. A 'Create' button is visible in the top right corner. A dropdown menu is open, showing options: 'User', 'Multiple Users', 'Custom Object' (highlighted with a red box), 'Custom Tab', 'Email Template', and 'Flow'. Below this, the 'Object Manager' page is shown for the 'Computer' object. The left sidebar lists details sections: 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Restriction Rules'. The 'Details' section is expanded, showing fields like 'API Name', 'Singular Label', 'Plural Label', 'Enable Reports', 'Track Activities', 'Track Field History', 'Deployment Status', 'Help Settings', and 'Standard salesforce.com Help Window'.

Setup | Home | Object Manager

Quick Find

Setup Home

- Salesforce Go
- Service Setup Assistant
- Commerce Setup Assistant
- Field Service Setup Home (Beta)
- Hyperforce Assistant
- Release Updates
- Salesforce Mobile App
- Lightning Usage
- Optimizer
- Sales Cloud Everywhere
- ADMINISTRATION

Home

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Join the Trailblazer Community

Get help, learn and collaborate with fellow customers.

Join Now

Most Recently Used

10 Items

Object Manager

SETUP > OBJECT MANAGER

Computer

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules

Details

Description

API Name

Computer__c

Custom

✓

Singular Label

Computer

Plural Label

Computers

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Create fields in the object “computer”

New Computer

* = Required

Information

* Name

Owner



Parijatha Kamuni

Price

Brand

--None--

Weight

Cancel

Save & New

Save

Nothing to see here

Create Tabular Report



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Report: Computers

New Computers Tabular Report

Tabular report



Report "New Computers Tabular Report" was saved

Total Records
5

Total Price
\$2,950,000

Total Weight
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)

Indeed.com

Home

Reports

Indeeds

Indeed prj forms

Chatter

Dashboards

Computers

Report: Computers

New Computers Summary Report

Summary Report showing (grouping field is Brand)

Total Records

5

Total Price

\$2,950,000

Total Weight

11

<input type="checkbox"/> Brand ↑	Computer: Name	Price	Weight	Computer: Created Date
<input type="checkbox"/> Dell (1)	A1	\$425,000	2	2025-07-19
Subtotal		\$425,000	2	
<input type="checkbox"/> Lenovo (1)	A2	\$500,000	3	2025-07-19
Subtotal		\$500,000	3	
<input type="checkbox"/> HP (1)	A3	\$600,000	3	2025-07-19
Subtotal		\$600,000	3	
<input type="checkbox"/> Mac (1)	A4	\$1,000,000	2	2025-07-19
Subtotal		\$1,000,000	2	
<input type="checkbox"/> 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
5

Total Weight
11

Price	Brand →	Dell	Lenovo	HP	Mac	Acer	Total
<input type="checkbox"/> \$425,000	Sum of Weight	2	0	0	0	2	4
	Record Count	1	0	0	0	1	2
<input type="checkbox"/> \$500,000	Sum of Weight	0	3	0	0	0	3
	Record Count	0	1	0	0	0	1
<input type="checkbox"/> \$600,000	Sum of Weight	0	0	3	0	0	3
	Record Count	0	0	1	0	0	1
<input type="checkbox"/> \$1,000,000	Sum of Weight	0	0	0	2	0	2
	Record Count	0	0	0	1	0	1

Details (5 Rows)  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)

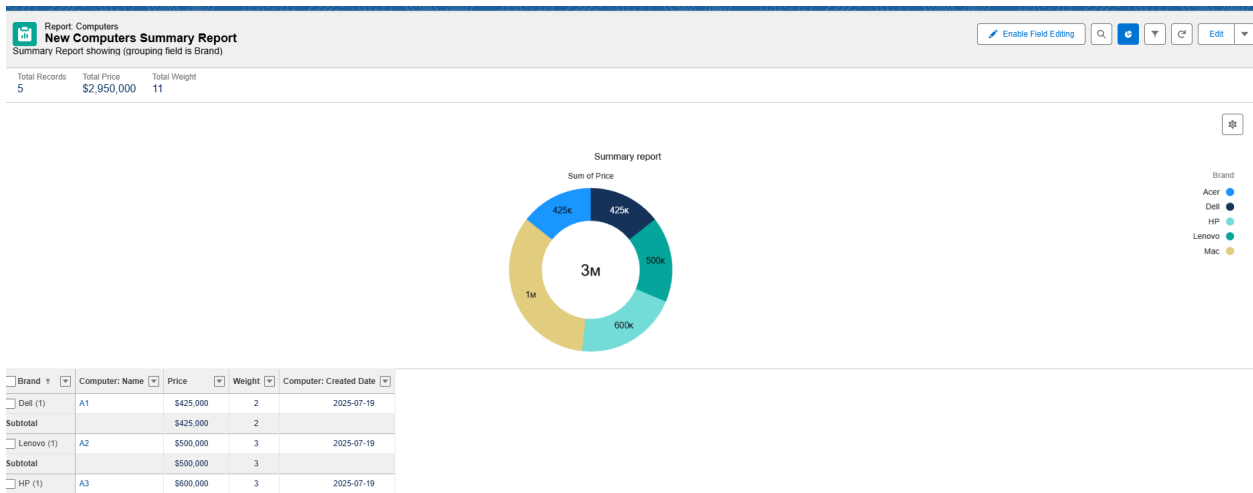
Report New Joined Report

« [Go to Report List](#)

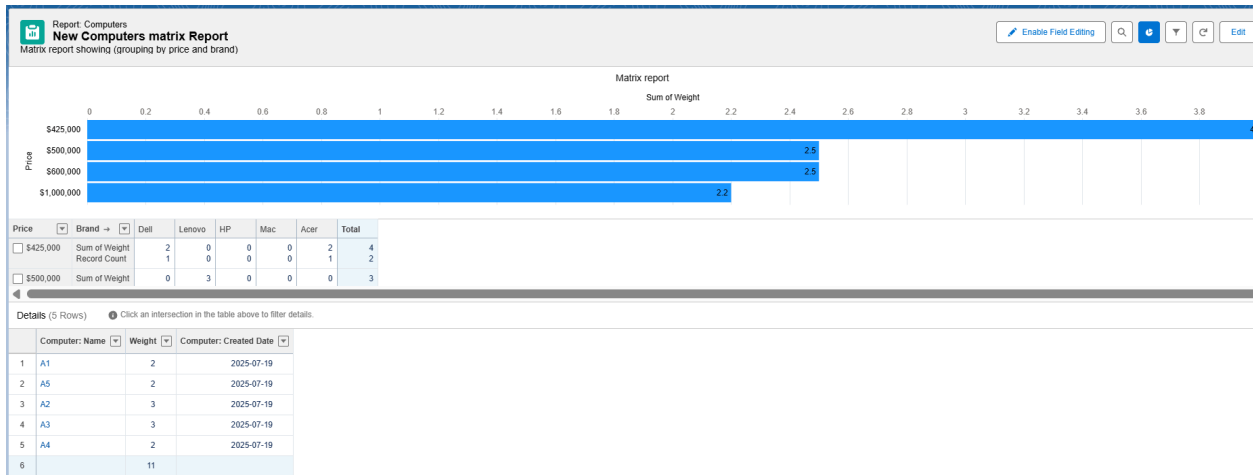
Run Report Hide Details Report Properties Save Save As Customize Delete Printable View | Report genera

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" was created

	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

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Dashboard

Assignment Reports and Dashboard - 30-06-2025


Refresh

Edit

Subscribe

As of Jul 20, 2025, 1:50 a.m. Viewing as Parjatha Kamuri

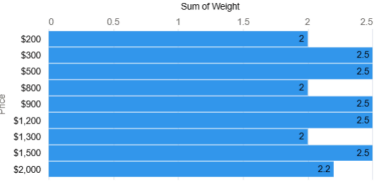
New Computers Summary Report



View Report (New Computers Summary Report)

As of Jul 20, 2025, 1:50 a.m.

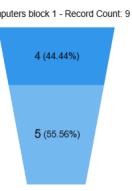
New Computers matrix Report



View Report (New Computers matrix Report)

As of Jul 20, 2025, 1:50 a.m.

New Joined Report



View Report (New Joined Report)

As of Jul 20, 2025, 1:50 a.m.

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

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Assignment Reports and Dashboard - 30-06-2025

+ Widget X Filter Save

New Computers Summary Report

Sum of Price

\$8.7k

View Report (New Computers Summary Report)

New Computers Tabular Report

Computer: Nam... Price Br... We... Computer: Created 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

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

Assignment Reports and Dashboard - 30-06-2025

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

Price greater than 1000

All greater than 1000

New Computers Summary Report

Sum of Price

\$6k

View Report (New Computers Summary Report)

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

New Computers matrix Report

Sum of Weight

Price

View Report (New Computers matrix Report)

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

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

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

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

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 ScheduleCancel

Running User  

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

Schedule Report

Frequency ☐ Daily ☒ Weekly ☐ Monthly

Recurs every week on


☐ Sunday ☒ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

Start [2025-07-20]

End [2025-07-20]

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 ScheduleCancel