

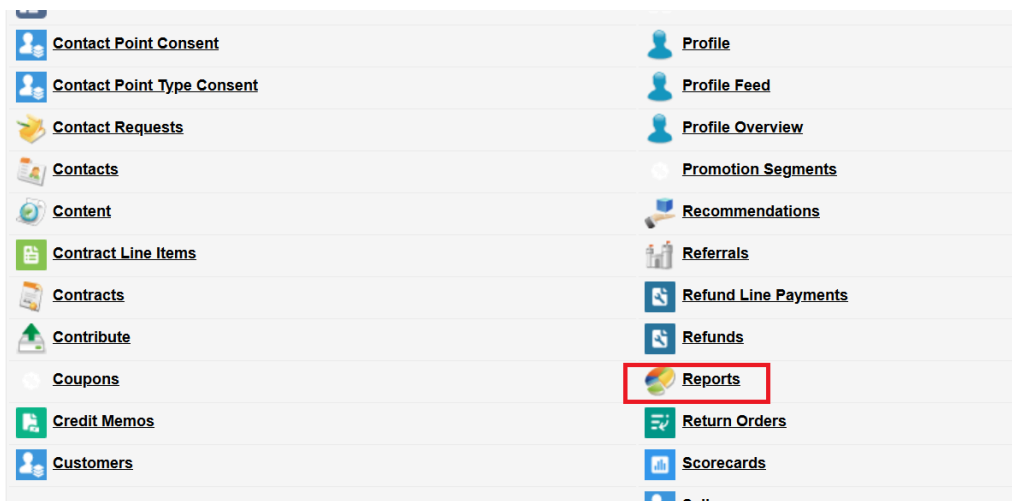
**Date: 27-05-2026**

## **Assignment 5: Summary report - Conditional Highlighting**

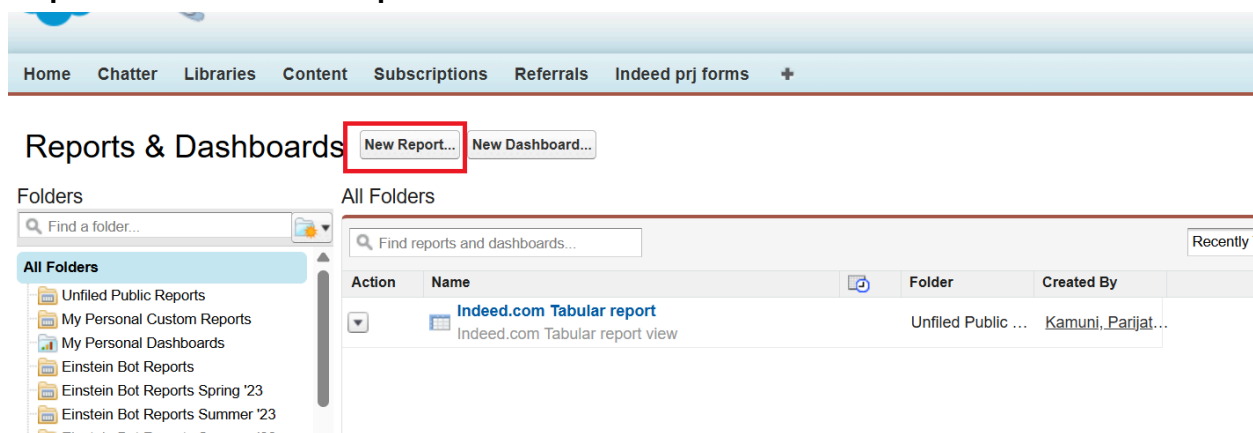
How to use conditional highlighting in the summary report. By default, it is not visible that we have to do something to activate/enable conditional highlighting in summary reports.

**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

☐ Select Report Types to Hide 

Select Report Type

Quick Find

- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contracts and Orders
- Price Books, Products and Assets
- Administrative Reports
- File and Content Reports
- Individuals
- Other Reports**
  - Indeed prj forms**
  - Orchestration Work Items Spring '24
  - Orchestration Run Logs Spring '24
  - Orchestration Stage Runs Spring '24
  - Orchestration Step Runs Spring '24

**Preview**

**Account Report**




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

Cancel **Create**

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

Report Type: Indeed prj forms  
Summary report data

**Save** Save As Close Report Properties Add Report Type Run Report

**Fields** All   

Quick Find

Drag and drop to add fields to the report.

- Bucket Fields
  - Add Bucket Field
- Indeed prj form: Info
  - Indeed prj form: ID
  - Indeed prj form: Indeed prj fc
  - Country
  - Expected Salary

**Filters** Add

Show My indeed prj forms

Date Field Passport Submission Range All Time From To

To add filters, click Add.

**Preview** Tabular Format Show Remove All Columns

Indeed prj form: Indeed prj form Name

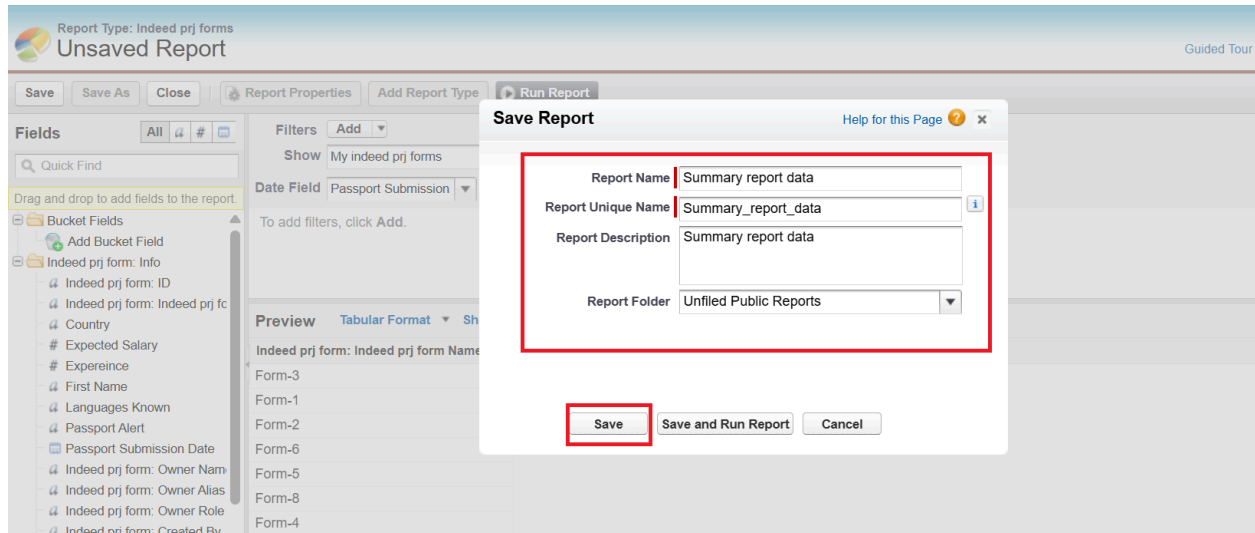
### Step 8: Type the **Report Name**

### Step 9: Unique Name will be auto-populated

### Step 10: Enter Description

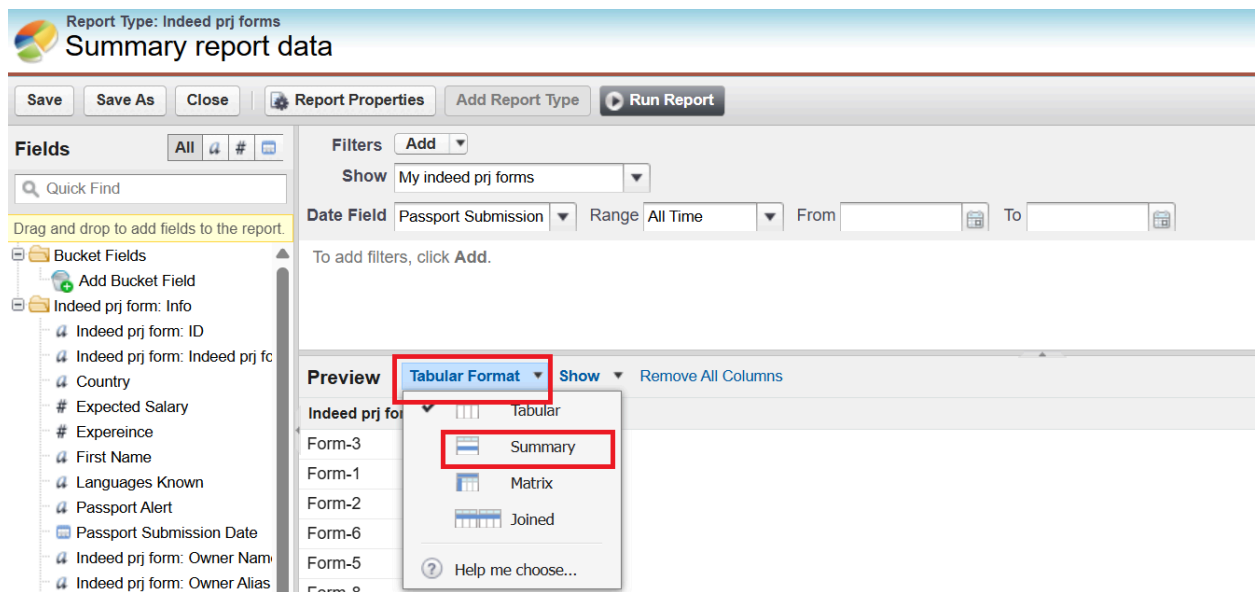
### Step 11: Select **Unfiled Public Reports**

### 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 #

Quick Find

Drag and drop to add fields to the report.

- Formulas
  - Add Formula
- Bucket Fields
  - Add Bucket Field
- Indeed prj form: Info
  - Indeed prj form: ID
  - Indeed prj form: Indeed prj form Name
  - Country
  - # Expected Salary
  - # Expeirence
  - First Name
  - Languages Known
  - Passport Alert
  - Passport Submission Date
- Indeed prj form: Owner Name
- Indeed prj form: Owner Alias
- Indeed prj form: Owner Role

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 #

Quick Find

Drag and drop to add fields to the report.

- Formulas
  - Add Formula
- Bucket Fields
  - Add Bucket Field
- Indeed prj form: Info
  - Indeed prj form: ID
  - Indeed prj form: Indeed prj form Name
  - Country
  - # Expected Salary
  - # Expeirence
  - First Name
  - Languages Known
  - Passport Alert
  - Passport Submission Date
- Indeed prj form: Owner Name
- Indeed prj form: Owner Alias
- Indeed prj form: Owner Role
- Indeed prj form: Created By

Filters Add

Show My indeed prj forms

Date Field Passport Submission Range All Time From To

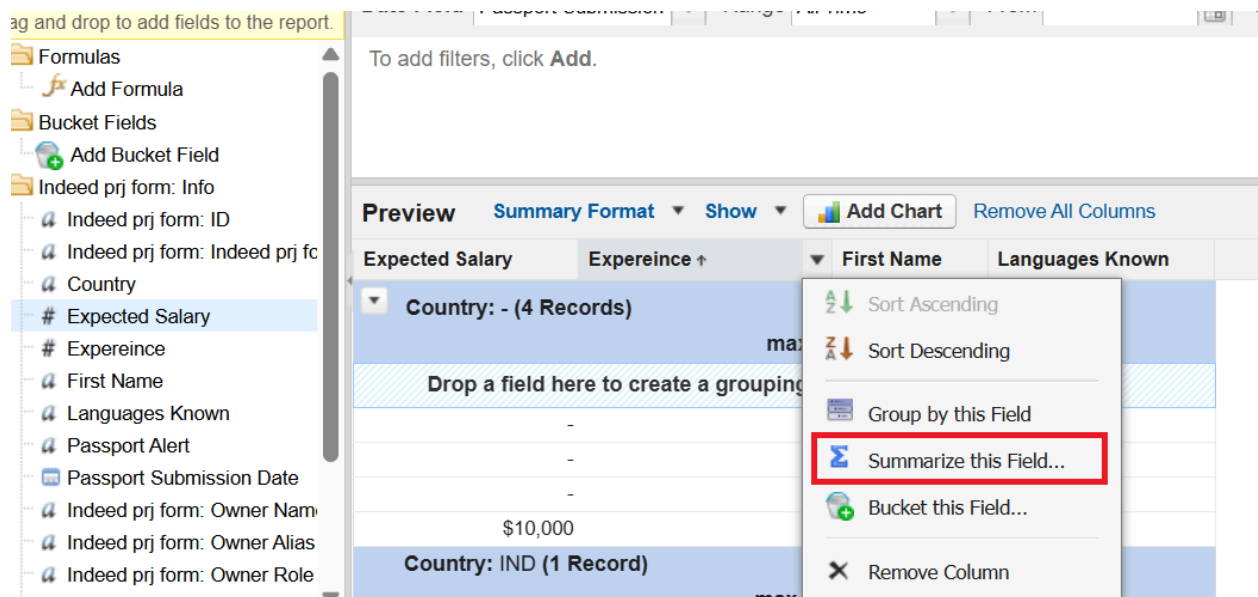
To add filters, click Add.

Preview Summary Format Show Add Chart Remove All Columns

Expected Salary	Expeirence	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)			

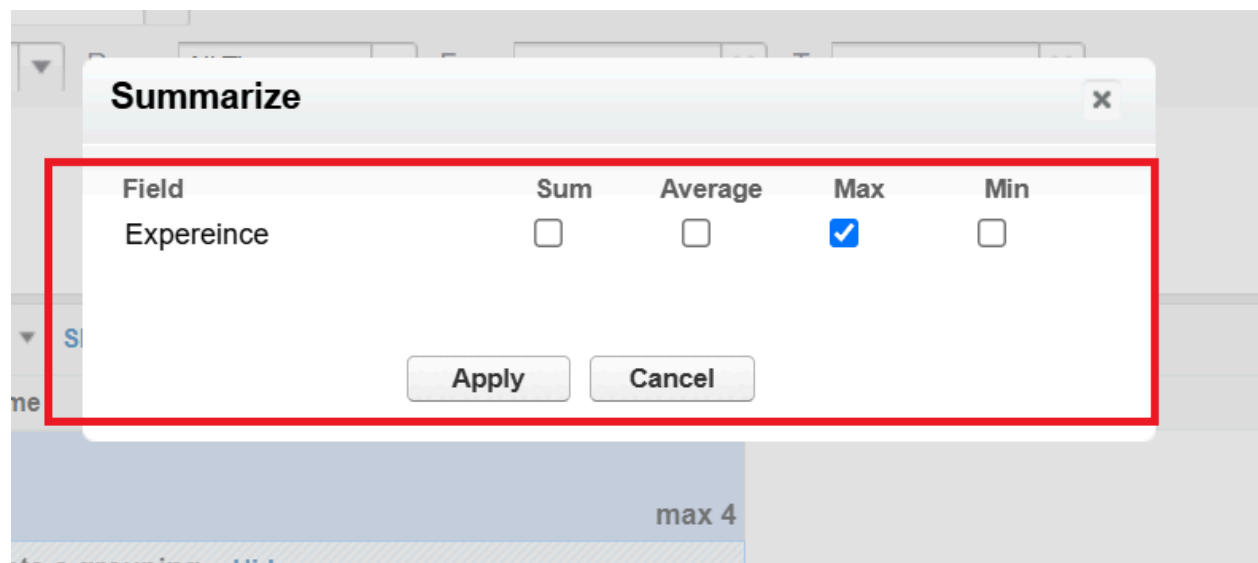
**Step 17:** Click on the Number Field (Conditional highlighting can be done for Number fields only). **ADDING A SUMMARY FIELD IS MANDATORY TO ENABLE THE CONDITIONAL HIGHLIGHTING OPTION**

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



**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.



## Step 19: Select **Show Dropdown** and Select **Conditional Highlighting**

The screenshot shows the 'Summary report data' window. The 'Fields' list on the left includes 'Indeed prj form: Info', 'Indeed prj form: ID', 'Indeed prj form: Indeed prj fo', 'Country', 'Expected Salary', 'Expereince', 'First Name', 'Languages Known', 'Passport Alert', 'Passport Submission Date', 'Indeed prj form: Owner Nam', 'Indeed prj form: Owner Alias', and 'Indeed prj form: Owner Role'. The 'Filters' section shows 'Show' set to 'My indeed prj forms' and 'Date Field' set to 'Passport Submission'. The 'Preview' section shows a table with columns 'Expected Salary', 'First Name', and 'Expereince'. The 'Show' dropdown menu is open, showing options: 'Details', 'Drop Zones', and 'Conditional Highlighting...'. The 'Conditional Highlighting...' option is selected.

Expected Salary	First Name	Expereince
-	John	-
-	John	-
\$10,000	kiran	4
Country: IND (1 Record)		
		max 10 min 10
\$4,000	John	Java
Country: UK (1 Record)		
		max 15

**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

The 'Conditional Highlighting' dialog box is shown. It has three rows for defining conditions. The first row is highlighted with a red box and contains the following values: 'Largest Expereince' (selected field), a green color swatch, the value '1', a purple color swatch, the value '5', and a red color swatch. The second and third rows are empty, showing '--Select Field--' and empty color swatches. The 'OK' button is highlighted with a red box.

Field	Color	Value	Color	Value	Color
Largest Expereince	Green	1	Purple	5	Red
--Select Field--	Red		Green		Green
--Select Field--	Red		Green		Green

**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

Summary report data

Report Generation Status: Complete

Report Options:

Summarize information by: Country Show: My indeed prj forms

Time Frame: Date Field: Passport Submission Date Range: Custom From: To:

Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

Grouped By: Country Sorted By: Country

Expected Salary	First Name	Languages Known	Experience
Country: - (4 records)			
	John	-	-
	John	-	-
	John	-	-
\$10,000	kiran	APEX	4
Country: IND (1 record)			
\$4,000	John	Java	10
Country: UK (1 record)			
\$40,000	Master	Dotnet	15
Country: CAN (1 record)			
\$30,000	mary	GPP	0
Country: AUS (1 record)			
\$50,000	peter	PHP	5
Grand Totals (8 records)			

Check rows to filter, then drill down by: --None-- Drill Down

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