

Create Salesforce Org

Introduction

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for

this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"
What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3IGde5k>

Creating Developer Org

Creating a developer org in salesforce.

1. Go to developers.salesforce.com/Signup
2. Click on sign up.
3. On the sign-up form, enter the following details:
 1. First name & Last name
 2. Email
 3. Role: Developer
 4. Company: College Name
 5. County: India
 6. Postal Code: pin code
 7. Username: should be a combination of your name and company

This need not be an actual email id, you can give anything in the format: username@organization.com

Creating Developer Org

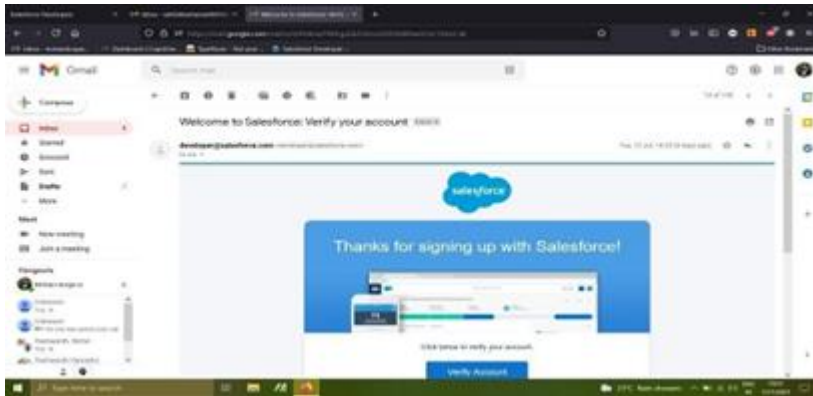
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ccount Activation

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as



Login to Your Salesforce Account

1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.

Object

Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types:

1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

What Is A Tab?

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

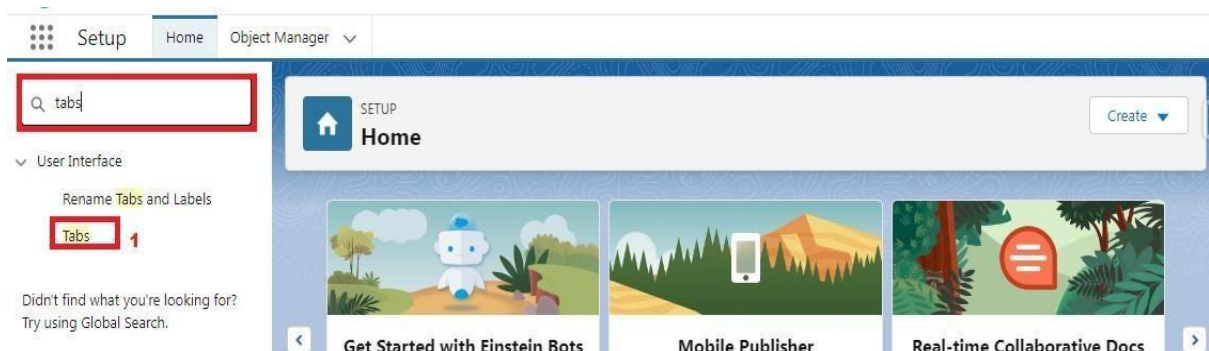
There are mainly 4 types of tabs:

- (A) Standard Object Tabs: Standard object tabs display data related to standard objects
- (B) Custom Object Tabs: Custom object tabs display data related to custom objects.
- (C) Web Tabs: Web Tabs display any external Web-based application or Web page in a Salesforce tab.
- (D) Visualforce Tabs: Visualforce Tabs display data from a Visualforce Page.

Creation Of Semester Tab For Candidate Internal Result Card

Now create a custom tab. Click the Home tab.

1. Enter Tabs in Quick Find and select Tabs.
2. Under Custom Object Tabs, click New.
3. For Object, select Semester.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save
6. In the same way create Tabs for all Custom Objects -Candidate, Course Details, Lecturer Details, Internal results .



Lightning App

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs. There are two types of app –

1. Standard App: Standard apps come with every occurrence of Salesforce as default. Many features like Sales, Marketing, Community, call center, content, Salesforce chatter, App Launcher, etc are present in it.

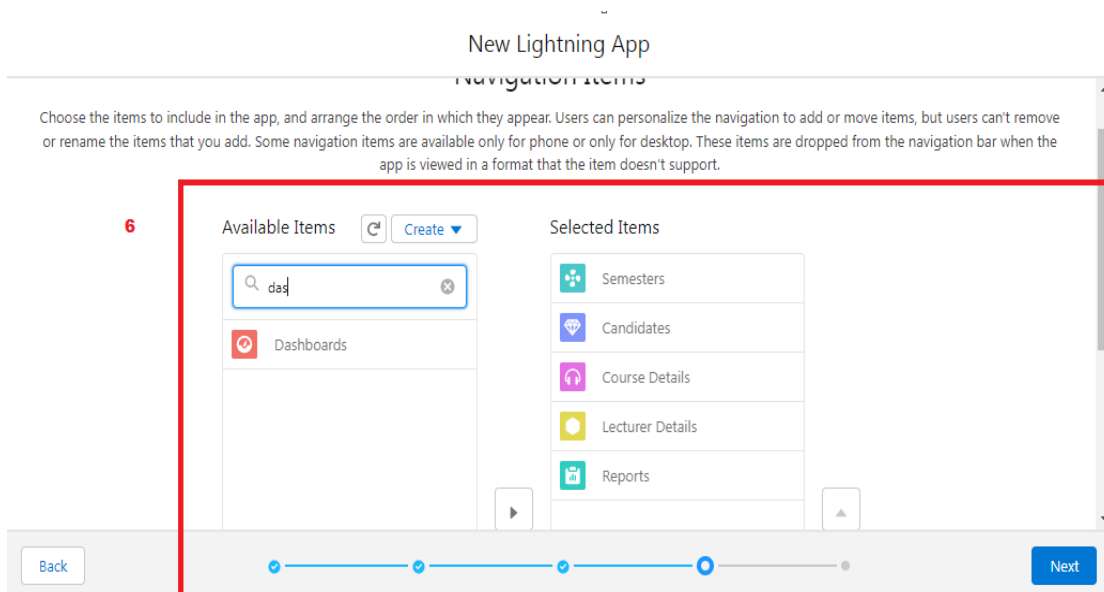
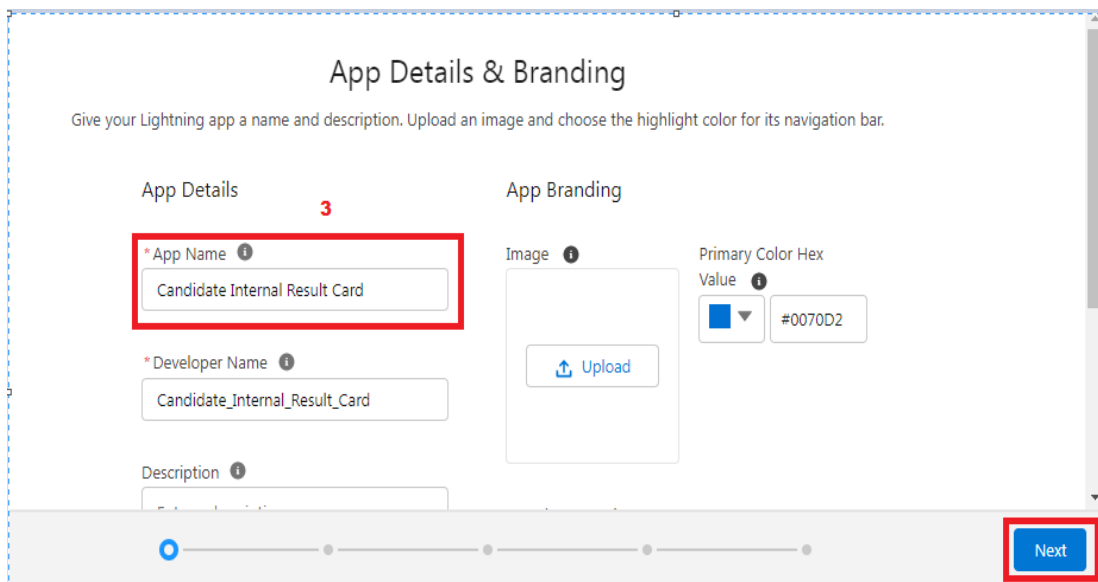
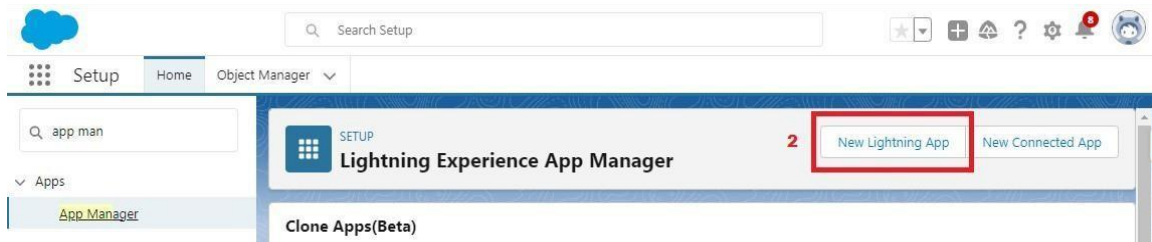
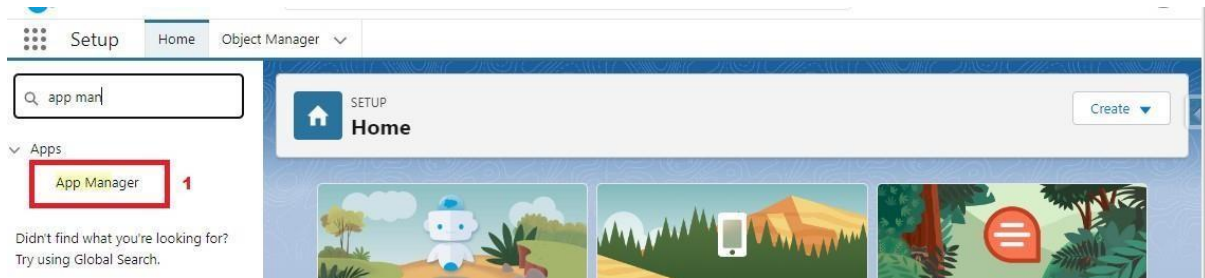
Note: The description, Logo, and Label of standard app cannot be altered.

2. Custom Apps: Custom apps are created according to need of user. Custom Apps are made by using standard and custom tabs together.

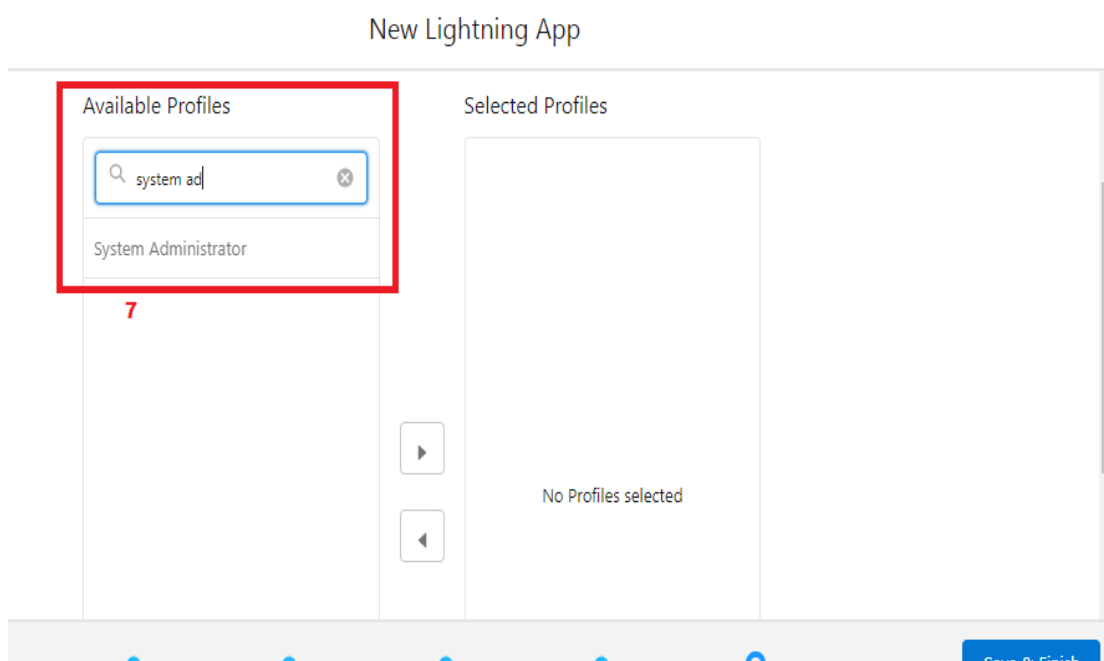
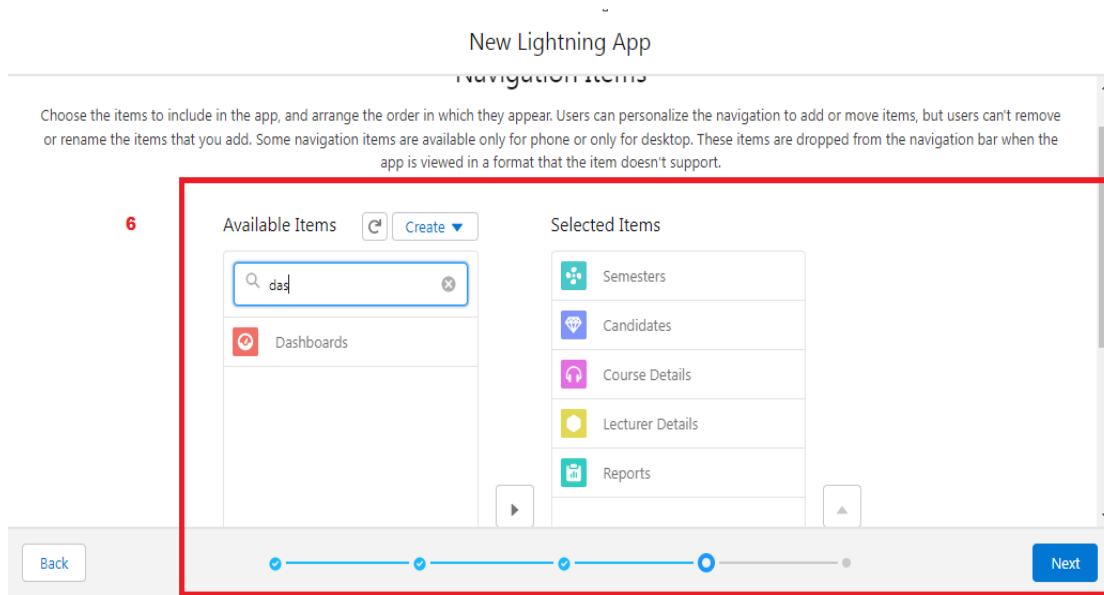
Note: Logos for Custom Apps can be changed.

Create The Candidate Internal Result Card App

1. From Setup, enter App Manager in the Quick Find and select App Manager.
 2. Click New Lightning App.
 3. Enter **Candidate Internal Result Card** as the App Name, then click next
 4. Under App Options, leave the default selections and click next.
 5. Under Utility Items, leave as is and click Next.
 6. From Available Items, select **Semester, Candidate, Course Details, Lecturer Details, Internal results, Reports, and Dashboards** and move them to Selected Items.
 7. Click Next.
- From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.



The screenshot shows the 'Windows Firewall' configuration window. On the left, under 'Available Profiles', there is a search bar containing 'system ad' and a list item 'System Administrator'. A red rectangular box is drawn around the 'Available Profiles' section. Below this list, a red number '7' is visible. On the right, under 'Selected Profiles', it says 'No Profiles selected'. At the bottom right, there is a blue button labeled 'Save & Finish'.



Fields And Relationship

Fields - Fields store data values that are required for a particular object in a record.

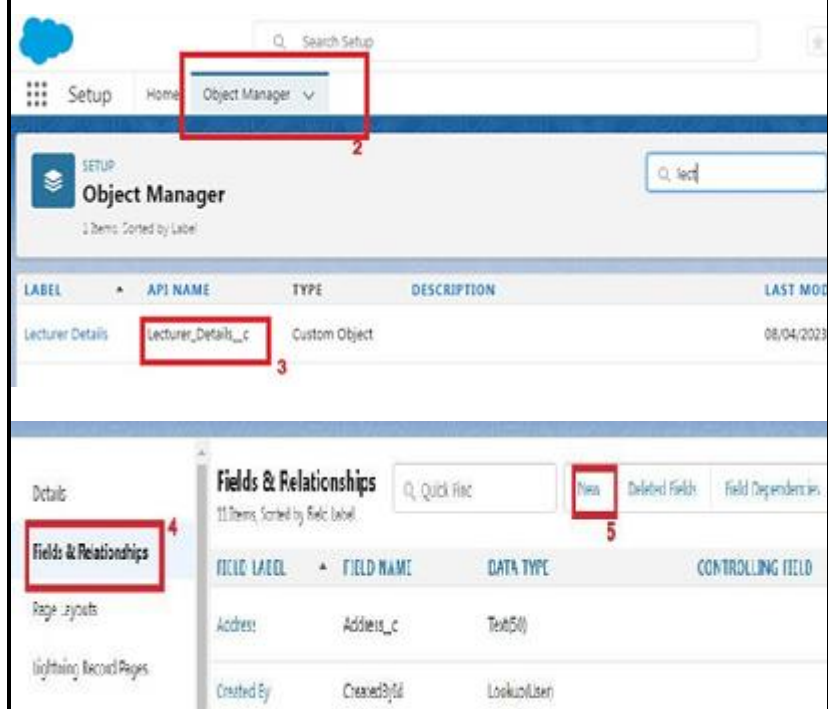
An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

Object Name	Field Name	Data type
Semester	Semester Name	Text(Standard field)
	Course	Lookup(Course Details)
Candidate	Candidate Name	Text(Standard field)
	Candidate Roll Number	Auto Number
	Semester Name	Lookup(Semester)
Lecturer Details	Lecturer Name	Text(Standard field)
	Lecturer Role	Text
	Course	Lookup(Course)
Course Details	Course Name	Text(Standard field)
	Duration (Years)	Number

Internal results	Candidate	Lookup (candidate)
	C a n d i d a t e R o l l N u m b e r	Formula
	Course	Lookup(Course)
	Marks	Number
Creation Of Text Field On "Lecturer Details" & Look Up	Course	Lookup(Course)

Field For The “Candidate” Object

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Lecturer Details
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Text as the Data Type, click next.
7. For Field Label, enter Lecturer Role
8. Enter Length 40
9. Click Next, Next, then Save & New.



<input type="radio"/> Number	Allows users to enter any number. Leading zeros are removed.	
<input type="radio"/> Percent	Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the field.	
<input type="radio"/> Phone	Allows users to enter any phone number. Automatically formats it as a phone number.	
<input type="radio"/> Picklist	Allows users to select a value from a list you define.	
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.	
<input checked="" type="radio"/> Text	Allows users to enter any combination of letters and numbers.	
<input type="radio"/> Text Area	Allows users to enter up to 255 characters on separate lines.	
<input type="radio"/> Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.	
<input type="radio"/> Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.	
<input type="radio"/> Text (Encrypted)	Allows users to enter any combination of letters and numbers and store them in encrypted form.	
<input type="radio"/> Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:00.000" are valid for this field.	
<input type="radio"/> URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a new window.	
<input type="radio"/> Number	Allows users to enter any number. Leading zeros are removed.	
<input type="radio"/> Percent	Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the field.	
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<input type="radio"/> URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a new window.	
Step 2. Enter the details		
<div> <div>Field Label</div> <div>Lecturer Role</div> <div></div> </div>		
<div> <div>Length</div> <div>40</div> <div></div> </div>		
<div> <div>Field Name</div> <div>Lecturer_Role</div> <div></div> </div>		
<div> <div>Description</div> <div></div> </div>		
<div> <div>Help Text</div> <div></div> </div>		

Now Let's create a Lookup field on candidate object

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select candidate.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the lookup as the Data Type, then click Next.
7. In related select Semester
8. For Field Label Semester Name, enter.
9. Click Next, Next, then Save & New.

The screenshot shows the Salesforce Setup interface. At the top, the 'Setup' menu is open, and 'Object Manager' is selected (labeled 2). Below this, the 'Object Manager' page is displayed, showing a list of objects. 'Lecturer Details' is selected (labeled 3). The 'Fields & Relationships' section is active (labeled 4), and the 'New' button is clicked (labeled 5). The 'Lookup Relationship' option is selected under 'Data Type' (labeled 6). In the 'Step 2. Choose the related object' section, 'Semester' is selected in the 'Related To' dropdown (labeled 7).

Setup

Object Manager

1 Item, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Lecturer Details	Lecturer_Details__c	Custom Object		08/04/2023

Details

Fields & Relationships

11 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Address	Address__c	Text(50)	
Created By	CreatedById	Lookup(User)	

Formulas

Roll-Up Summary

Lookup Relationship

Master-Detail Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To: Semester

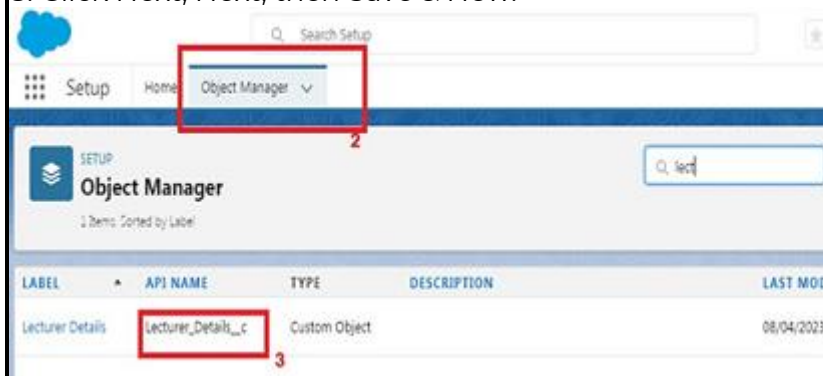
A screenshot of a field configuration form. The 'Field Label' and 'Field Name' fields are both set to 'Semester Name' and are highlighted with a red box. A red number '8' is placed to the right of the 'Field Name' field. Below these fields are empty text boxes for 'Description' and 'Help Text'.

Note- Similarly create all lookup fields on their respective objects.

Creation Of Auto Number Field On Candidate Object, Number Field On Course Details Object & Formula Field Course Details Object

Let's create a Number field on Course Details object

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Course Detail.
4. Select Fields & Relationships from the left navigation
4. Click New & select number field, click Next
6. For Field Label Duration, enter.
7. Give Help Text- Enter Course duration value in Years
8. Click Next, Next, then Save & New.



Details: Fields & Relationships 11 Items, Sorted by Field Label.

Fields & Relationships (4)

Page Layouts

Lightning Record Pages

Fields & Relationships (5)

Field Label: Duration (6)

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length: 1 (Number of digits to the left of the decimal point)

Decimal Places: 2 (Number of digits to the right of the decimal point)

Field Name: Duration

Description:

Help Text: Enter Course duration value in Years (7)

Now Let's create a Formula field on Internal Results object

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Internal results.
4. Select Fields & Relationships from the left navigation.
5. Click New
6. Select the Formula as the Data Type, then click Next.
7. Give field label Candidate Roll Number
8. Select formula return type text, Click Next
9. Click Insert Field
10. Create and insert formula Candidate r.Candidate_Roll_Number c, and then click Insert.
11. Click Next, Next, then Save.

Setup

Object Manager (2)

Object Manager

1 Items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MOD
Lecturer Details	Lecturer_Details__c (3)	Custom Object		08/04/2023

Details

Fields & Relationships

11 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Address	Address_c	Text(50)	
Created By	CreatedById	Lookup(User)	

Page Layouts

Lightning Record Pages

Data Type

☐ None Selected

Select one of the data types below.

☐ Auto Number

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

☒ Formula

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Field Label

Candidate Roll Number

7

Field Name

Candidate_Roll_Number

1

Auto add to custom report type

☒ Add this field to existing custom report types that contain this entity

1

Formula Return Type

☐ None Selected

Select one of the data types below.

☐ Checkbox

Calculate a boolean value.
Example: `{TODAY() > CloseDate}`

☐ Currency

Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `{Gross Margin * Amount - Cost}_c`

☐ Date

Calculate a date, for example, by adding or subtracting days to other dates.
Example: `{Reminder Date + CloseDate - 7}`

☐ DateTime

Calculate a datetime, for example, by adding a number of hours or days to another datetime.
Example: `{Next + NOW() + 1}`

☐ Number

Calculate a numeric value.
Example: `{Fahrenheit * 1.8 * Celsius}_d + 32`

☐ Percent

Calculate a percent and automatically add the percent sign to the number.
Example: `{Discount * (Amount - Discounted_Amount)_c / Amount}`

☒ Text

8

Create a text string, for example, by concatenating other text fields.
Example: `{Full Name * } & First Name & First Name`

Example: {Full Name * LastName & ", " & FirstName}

More Examples...

Simple Formula

Advanced Formula

Insert Field

9

Insert Operator

Candidate Roll Number (Text) =

Functions

-- All Function Categories --

ABS

ACOS

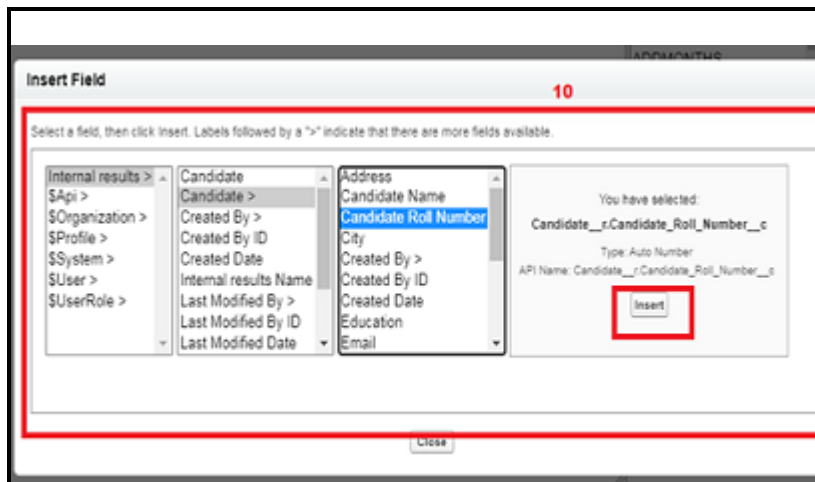
ADDMONTHS

AND

ASCII

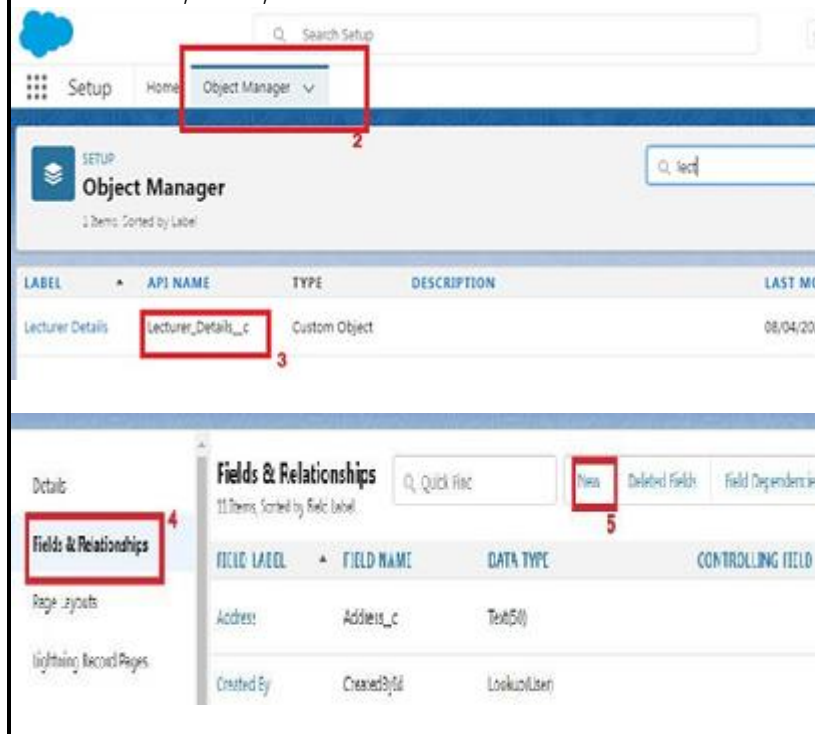
ASIN


Insert Selected Function



Now Let's create an auto number field on Candidate object

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Candidate.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Auto Number as the Data Type, then click Next.
7. For Field Label Candidate enter Roll Number.
8. Give a display format
9. Click Next, Next, then Save & New.



		
<h1>Users</h1> <p>A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.</p> <h2>Creating A User</h2> <ol style="list-style-type: none">1. From Setup, in the Quick Find box, enter Users.2. Select Users.3. Click New User.4. Enter the First Name, Class, Last Name, Teacher and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.5. Select a User License as salesforce. <p>NOTE- As Salesforce license can only be used by 2 Users at a time in Dev Org, so If you don't find salesforce license then deactivate a user who has salesforce license Or change the license type from Salesforce to any other.</p> <ol style="list-style-type: none">6. Select a profile as Standard user.7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.		

The image shows two screenshots from the Salesforce Setup interface. The top screenshot is the 'Users' page, and the bottom screenshot is the 'User Edit' form. Red boxes and numbers 1 through 6 highlight specific elements in both screenshots.

Top Screenshot: Users Page

- 1**: Search bar containing the text 'user'.
- 2**: 'Users' link in the left-hand navigation menu.
- 3**: 'New User' button in the top right of the 'All Users' section.

Bottom Screenshot: User Edit Form

- 4**: A red box surrounding the 'First Name', 'Last Name', 'Alias', 'Email', 'Username', and 'Nickname' fields.
- 5**: 'First Name' field containing the text 'Class'.
- 6**: 'Last Name' field containing the text 'Teacher'.

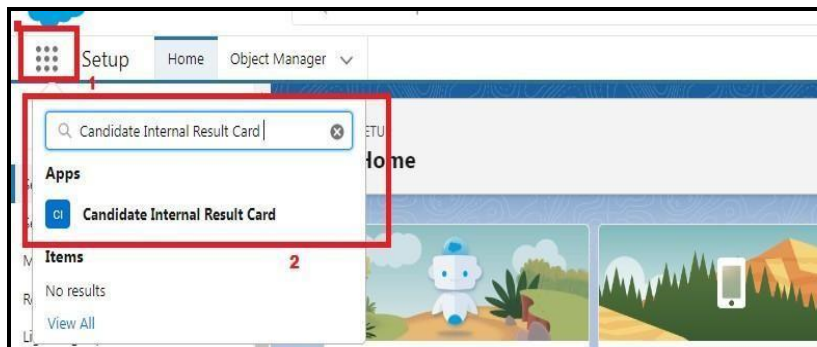
User Adoption

Salesforce user adoption is the simple act of enabling a user to use SFDC's full CRM capabilities by creating strategies around onboarding, training, and continued development – all to drive overall digital adoption.

Create Record (Course Details)

Create Records on Course Details Objects

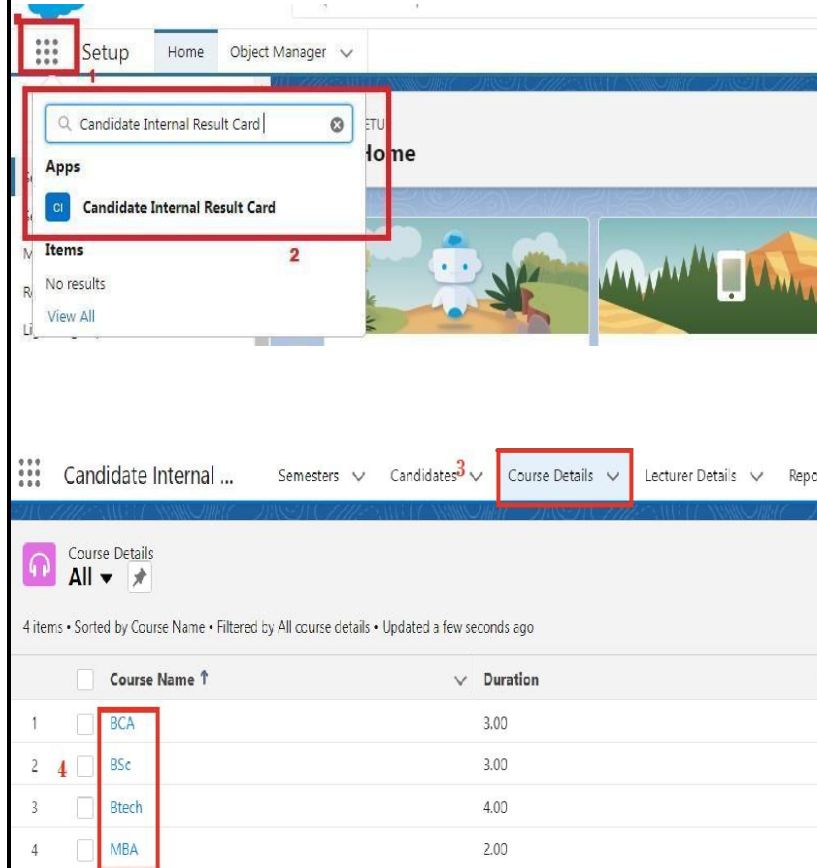
1. Click on App Launcher on left side of screen.
2. Search Candidate Internal Result Card App & click on it.
3. Click on Course Details tab.
4. Click new button
5. Fill all Course Details record details.
6. Click on Save Button.



View Record (Course Details)

Viewing the Records of Course Detail Object

1. Click on App Launcher on left side of screen.
2. Search Candidate Internal Result Card & click on it.
3. Click on Course details Tab.
4. Click on any record name. you can see the details of the Driver

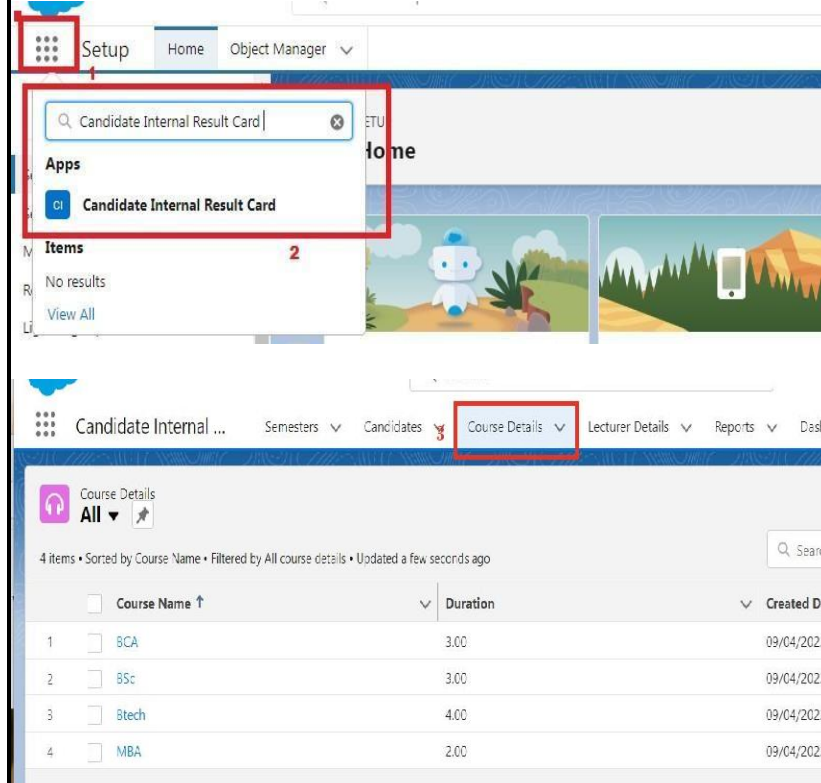


Delete Record (Course Details)

Deleting Records of Course Details Object

1. Click on App Launcher on left side of screen.
2. Search Candidate Internal Result Card & click on it.
3. Click on Course details Tab.

4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.



What Are Reports?

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce:

Tabular Reports:

This is the most basic report format. It just displays the row of records in a table with a grand total. While easy to set up they can't be used to create groups of data or charts and also cannot be used in Dashboards. They are mainly used to generate a simple list or a list with a grand total.

Summary Reports:

It is the most commonly used type of report. It allows grouping of rows of data, view subtotal, and create charts.

Matrix Report:

It is the most complex report format. Matrix report summarizes information in a grid format. It allows records to be grouped by

both columns and rows. It can also be used to generate dashboards. Charts can be added to this type of report.

Joined Reports:

These types of reports let us create different views of data from multiple report types. The data in joined reports are organized in blocks. Each block acts as a sub-report with its own fields, columns, sorting, and filtering. They are used to group and show data from multiple report types in different views.

Report types:

Report type determines which set of records will be available in a report. Every report is based on a particular report type. The report type is selected first when we create a report. Every report type has a primary object and one or more related objects. All these objects must be linked together either directly or indirectly.

A report type cannot include more than 4 objects. Once a report is created its report type cannot be changed.

There are 2 types of report types:

Standard Report Types: Standard Report Types are automatically included with standard objects and also with custom objects where “Allow Reports” is checked. Standard report types cannot be customized and automatically include standard and custom fields for each object within the report type. Standard report types get created when an object is created, also when a relationship is created.

Note: Standard report types always have inner joins.

Custom Report Types: Custom report types are reporting templates created to streamline the reporting process. Custom Reports are created by an administrator or User with “Manage Custom Report Types” permission. Custom report types are created when standard report types cannot specify which records will be available on reports.

In custom report types we can specify objects which will be available in a particular report.

The primary object must have a relationship with other objects present in a report type either directly or indirectly.

There are 3 types of access levels of folders:

Viewer: With this access level, users can see the data in a report but cannot make any changes except cloning it into a new report.

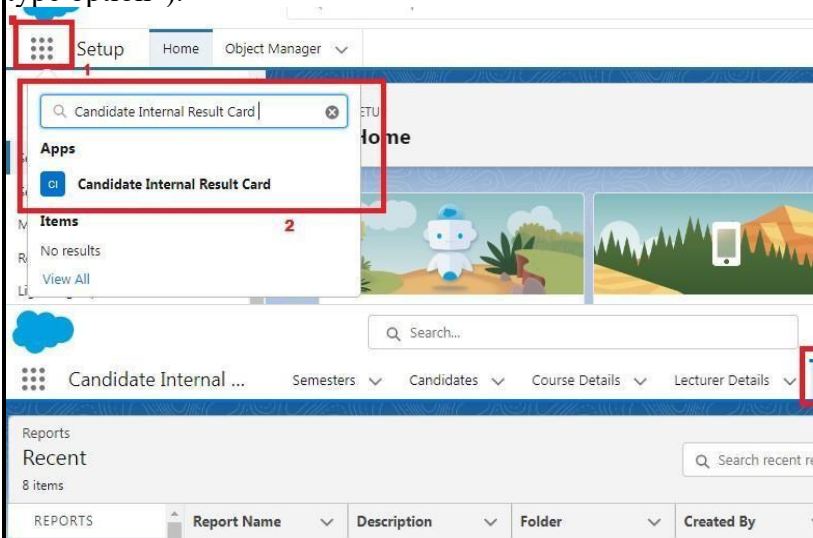
Editor: With this access level, users can view and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.

Manager: With this access level, users can do everything Viewers & Editors can do, plus they can also control other user's access levels to this folder. Also, users with Manager Access levels can delete the report.

Create Report

1. Click App Launcher
2. Select Candidate Internal Result Card App
3. Click reports tab
4. Click New Report.
5. Click the report type as Semesters with Course Click Start report.
6. Customize your report, in group rows select - Course Name, in group column Select Duration (In this way we are making a Matrix Report).
7. Click refresh
8. Click save and run
9. Give report name – Candidate Internal Result Report
10. Click Save

NOTE: In this report you can see your all record of the object you selected for reporting (What you Selects in “Select a report type option”).



Candidate Internal ...

Semesters ▾

Candidates ▾

Course Details ▾

Lecturer Details ▾

REPORT ▾

Candidate Internal Result Report

Semesters with Course

↶

↷

Add Chart

Outline

Filters 1

Groups 6

GROUP ROWS

Add group...

Course: Course Name

GROUP COLUMNS

Add group...

Course: Duration

Course: Course Name

Semester: Semester Name

BCA (1)	1st
Subtotal	
BSc (3)	2nd
	6th
	3rd
Subtotal	
Btech (2)	4th
	5th

Save Report

* Report Name

Candidate Internal Result Report

Report Unique Name

Candidate_Internal_Result_Report_bkY

Report Description

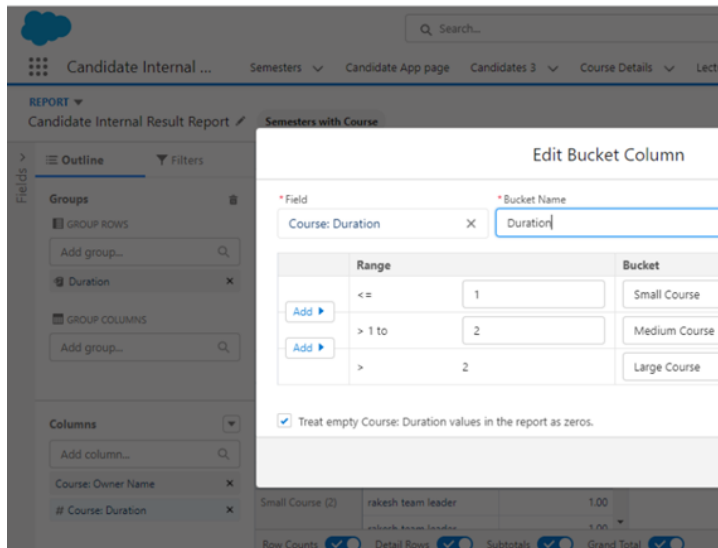
7

Refresh

9

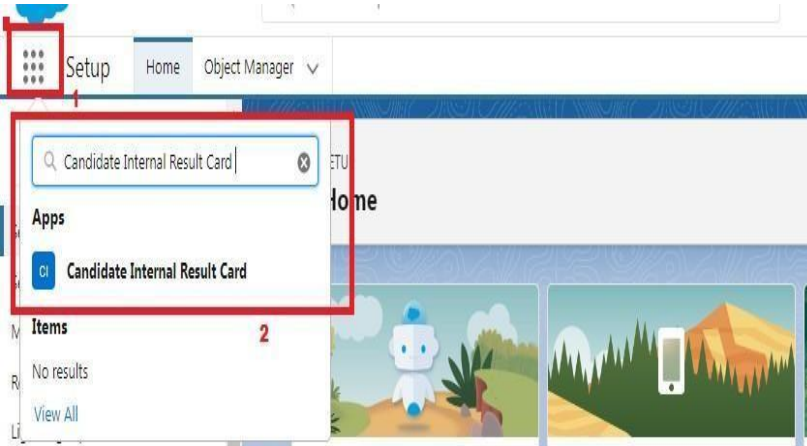
- On the report builder page, locate the "Fields" pane on the left-hand side.
- Find the field for which you want to create a bucket field and drag it to the report preview section.
- Click on the field in the report preview to open the field properties.
- In the field properties, locate the "Summarize" option and click the drop-down arrow.
- Select "Bucket Field" from the available options.
- In the bucket field settings, define the buckets based on your requirements. You can specify the bucket ranges, labels, and groupings.
- Click "OK" or "Apply" to save the bucket field settings.

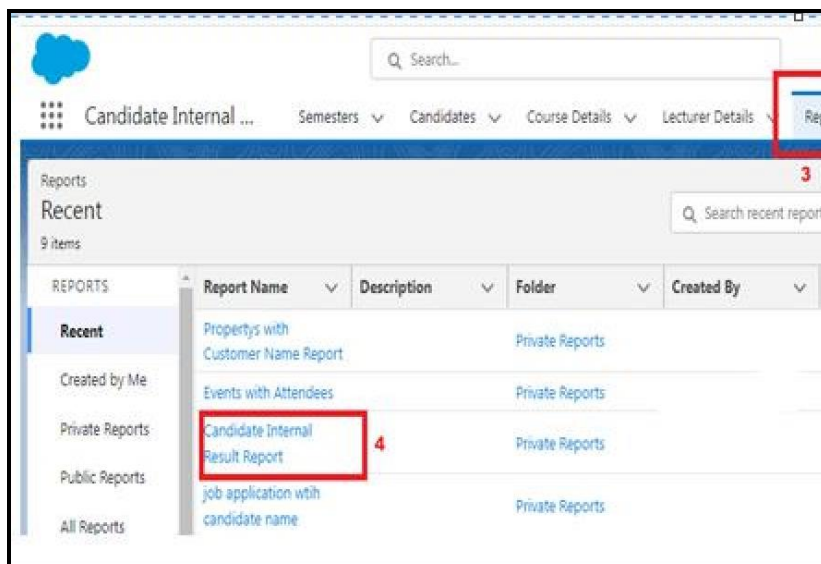
8. Customize the report layout and add any additional fields or filters as needed.
9. Once you are satisfied with the report setup, click "Save" to save the report.



View Report

1. Click on App Launcher on left side of screen.
2. Search Candidate Internal Result Card App & click on it.
3. Click on Reports Tab.
4. Click on Candidate Internal Result Report and see records.



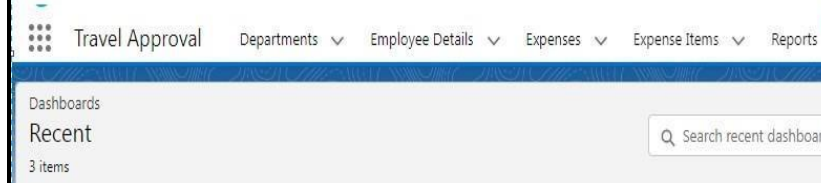


Dashboards

Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then they're able to view your dashboard's data-supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

Create Dashboard

1. Click on Dashboards tab from the Candidate Internal Result Card application.
2. Click on new dashboard.
3. Give name- Candidate Internal Result Card
4. Click create
5. Give your dashboard a name and click on +component
6. Select the Candidate Internal Result Report which you created.
7. For the data visualization select any of the chart, table etc. as per your choice/requirement.
8. Click add.
9. Click save.



New Dashboard

* Name

Candidate Internal Result Card |

Description

3

Folder

Private Dashboards



Q Search...



Travel Approval

Departments ▾

Employee Details ▾

Expenses ▾

Expense Items ▾

Reports ▾

Employee Travel detail



5

+ Component

Select Report

Reports

Recent

Created by Me

Private Reports

Public Reports

All Reports

Folders

Select Report

Q Search Reports and Folders...

Candidate Internal Result Report

██████████ · 09-Apr-2023, 7:57 pm · Private Reports

6

job application with candidate name

Vanshiv Technologies · 08-Apr-2023, 7:08 pm · Private Reports

Propertyts with Customer Name Report

Vanshiv Technologies · 08-Apr-2023, 12:58 pm · Private Reports

Add Component

Report

Candidate Internal Result Report

☐ Use chart settings from report

Display As

X-Axis

Course: Course Name

Preview

Candidate Internal Result Re

Record Count

4

2

0

1

3

BCA BSc

Course: C

View Report (Candidate Internal Resu

Candidate Internal ...

Semesters

Candidates

Course Details

Lecturer Details

Report

Candidate Internal Result Card

+ Component

Candidate Internal Result Report

Record Count

3

2

1

0

1

3

2

1

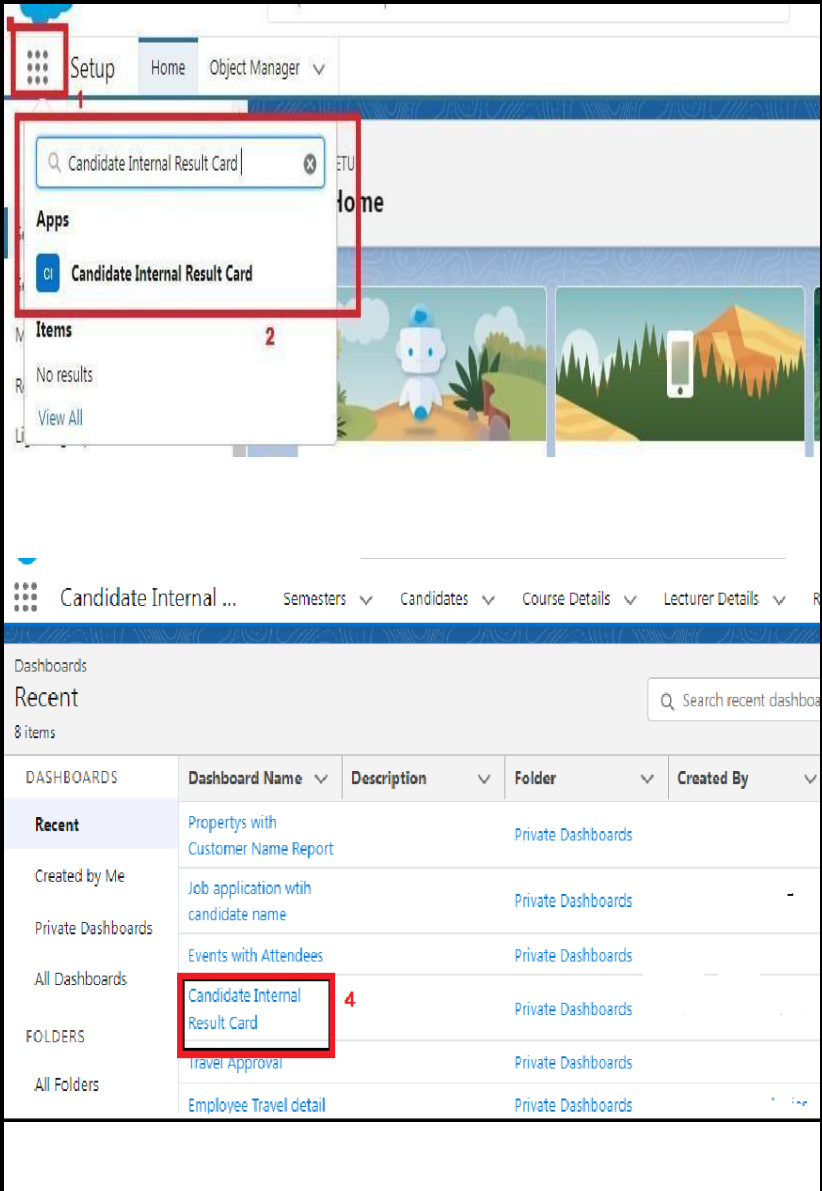
BCA BSc Btech MBA

Course: Course Name

View Report (Candidate Internal Result Report)

View Dashboard

1. Click on App Launcher on left side of screen.
2. Search Candidate Internal Result Card & click on it.
3. Click on Dashboard Tab.
4. Click on Candidate Internal Result Card see graph view of records

 <p>The screenshot shows a software interface with a top navigation bar containing 'Setup', 'Home', and 'Object Manager'. A search bar is open, displaying 'Candidate Internal Result Card'. Below the search bar, there are two sections: 'Apps' and 'Items'. Under 'Apps', the 'Candidate Internal Result Card' is listed. Under 'Items', it says 'No results'. Below these sections, there is a table titled 'Recent' with columns: 'Dashboard Name', 'Description', 'Folder', and 'Created By'. The table lists several dashboards, including 'Propertyys with Customer Name Report', 'Job application with candidate name', 'Events with Attendees', and 'Candidate Internal Result Card'. The 'Candidate Internal Result Card' is highlighted with a red box and a red number '4' next to it.</p>		
	Marks	Number