

## PROJECT REPORT ON

### Implementing CRM for Result Tracking of a Candidate with Internal Marks

#### (ADMIN) - (Short-term)

**Introduction:** The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help to those professionals who are in crosstechnology and wanted to switch to Salesforce with the help of this project they will gain knowledge and can include into their resume as well.

**Milestone 01:** Create Salesforce Org Go to  
**developers.salesforce.com/Signu**

p Click on sign up.

On the sign-up form, enter the following details:

1. First name & Last name :- SUCHITRA KALLURI
2. Email :-k.suchitra2004@gmail.com
3. Role:- Administrator
4. Company:- GAYATRI DEGREE COLLEGE - TIRUPATI
5. County:- India
6. Postal Code:- 517501

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First Name\* SUCHITRA Last Name\* KALLURI

Email\* k.suchitra2004@gmail.com

Role\* Administrator

Company\* GAYATRI DEGREE COLLEGE TIRUPATIs

Country/Region\* India

Postal Code\* 517501

Username\* k.suchitra2004@gdcproject.com

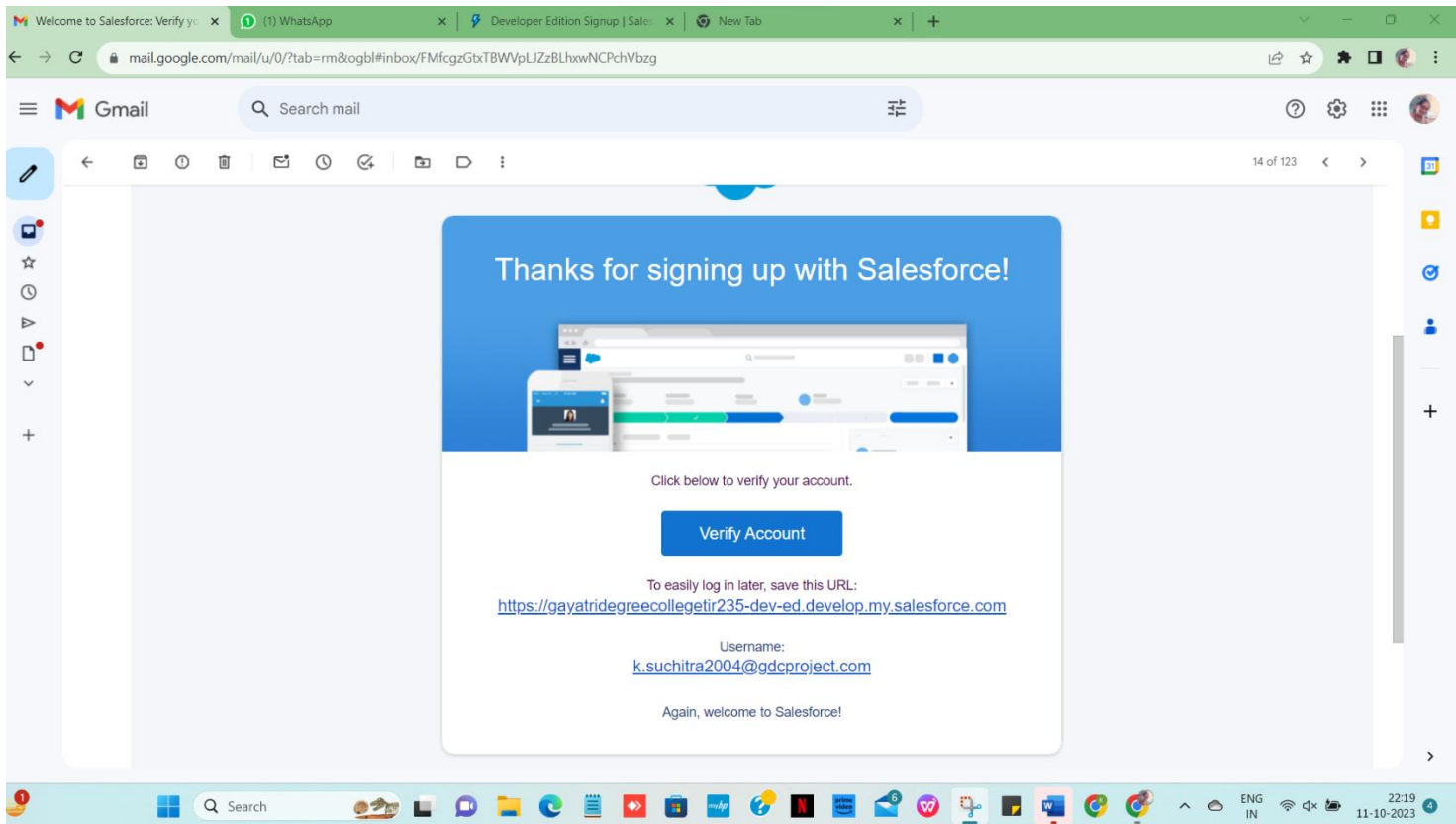
Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)

7. Username:- [k.suchitra2004@gdcproject.com](mailto:k.suchitra2004@gdcproject.com)

8.

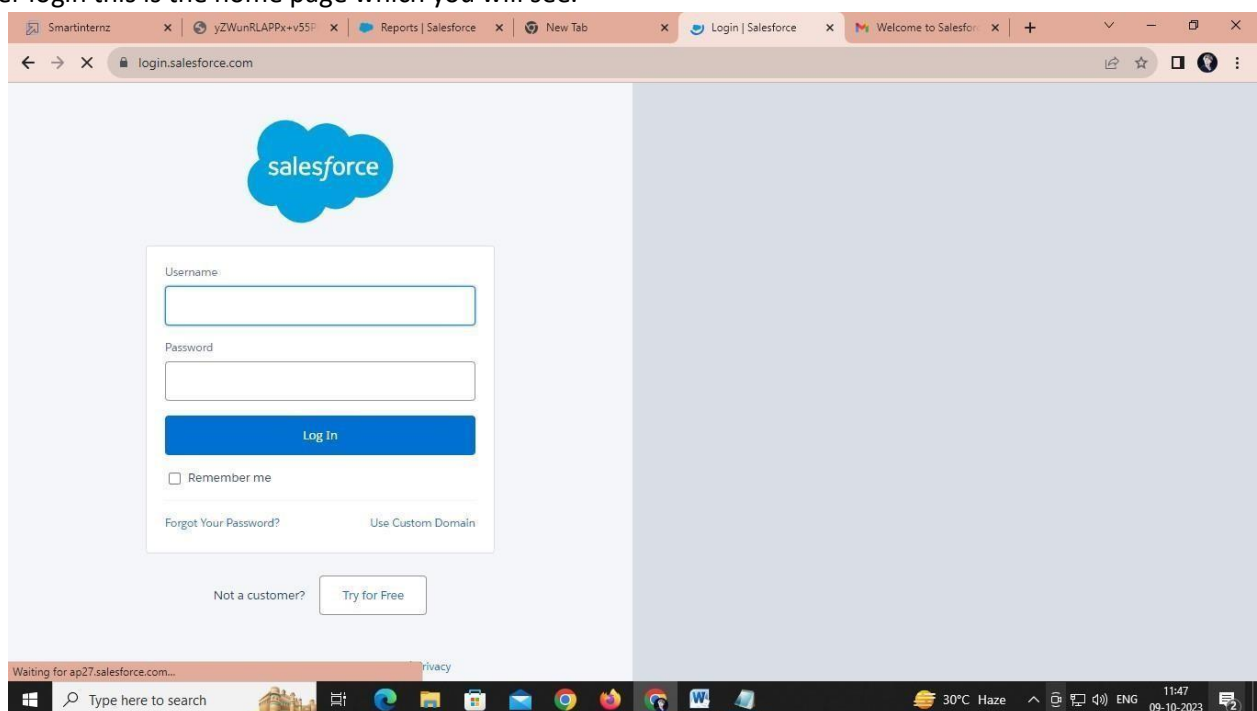
## Account Activation

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

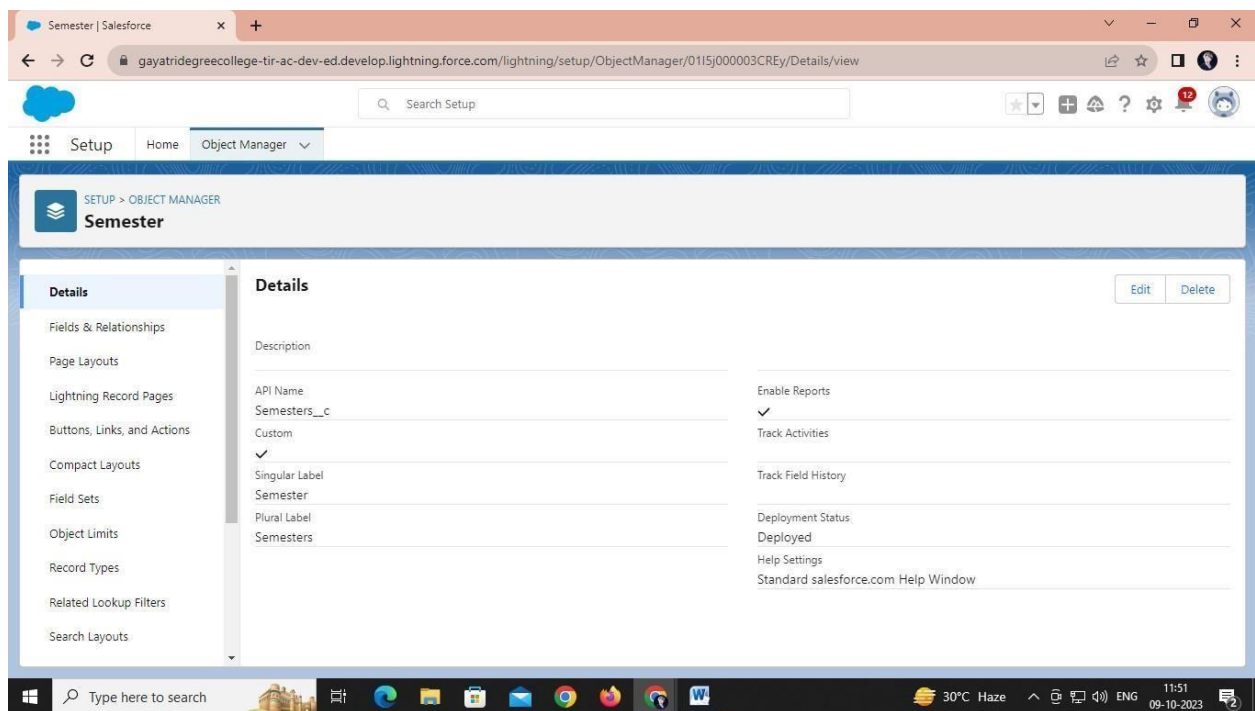
1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



## Milestone – 02: Creation of Objects

### Object – Semester

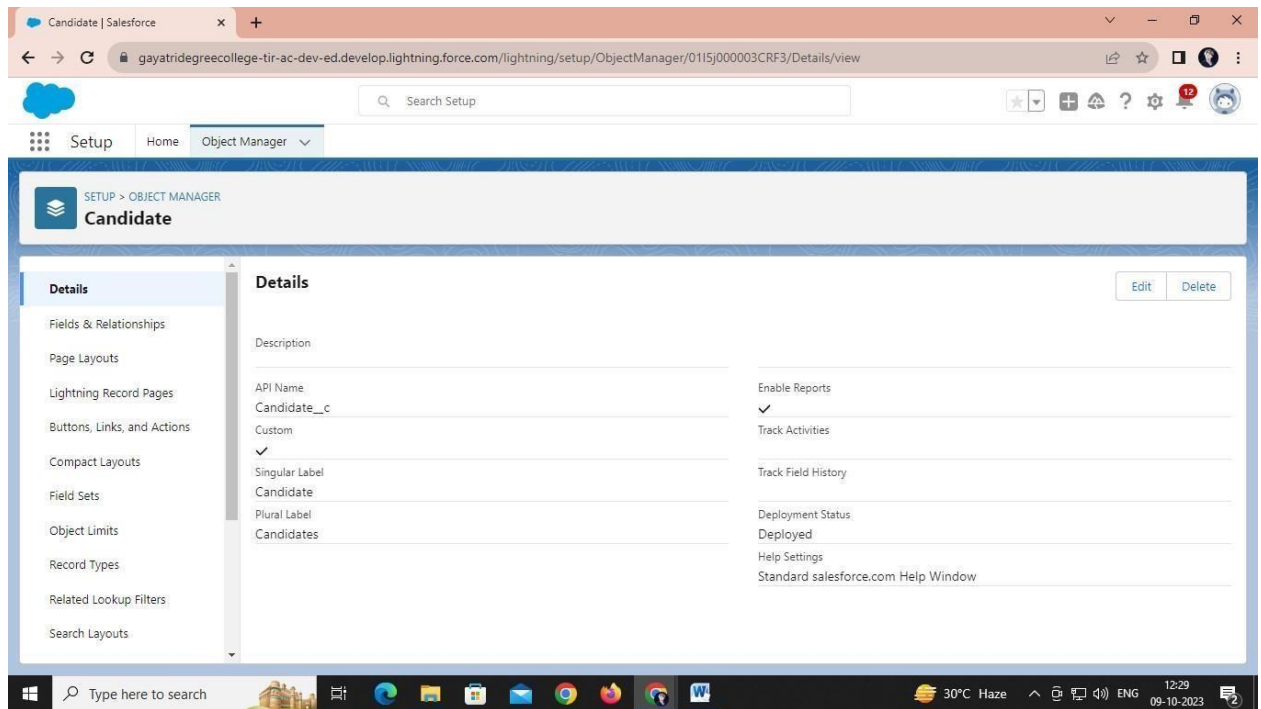
1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Drop down click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
  5. Label: **Semester**
  6. Plural Label: Semesters
  7. Record Name: Semester Name
  8. Check the Allow Reports
  9. Check the Allow Search 10. 10.Click Save.



### Object – Candidate

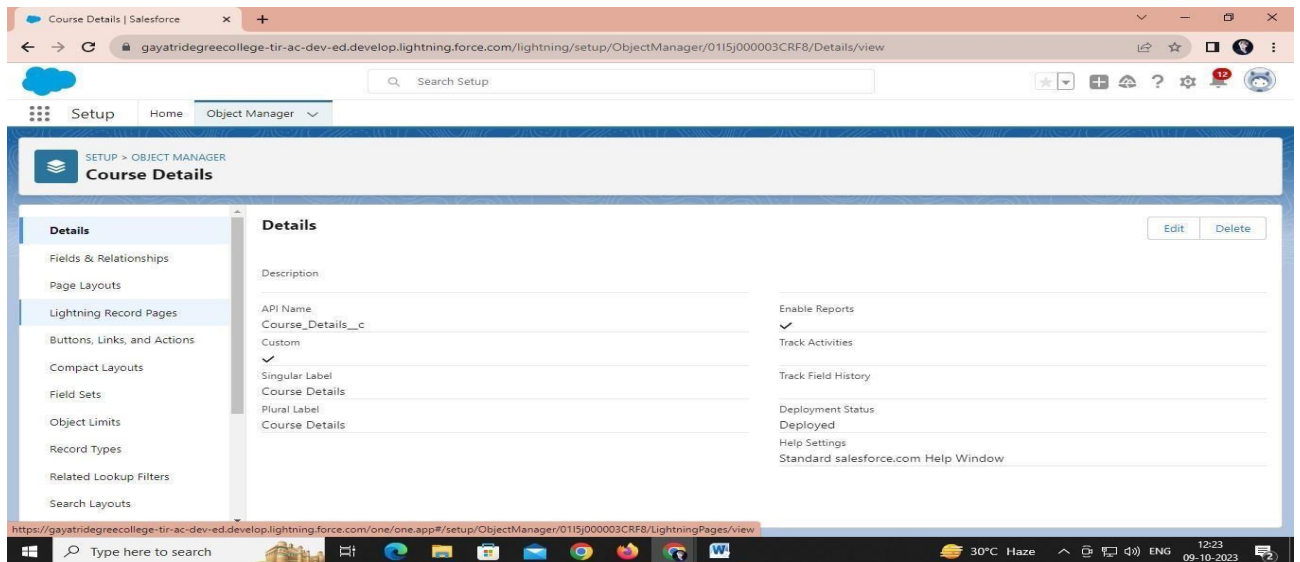
1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Drop down click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
  5. Label: **Candidate**
  6. Plural Label: Candidates
  7. Record Name: Candidate Name

8. Check the Allow Reports
9. Check the Allow Search
10. Click Save



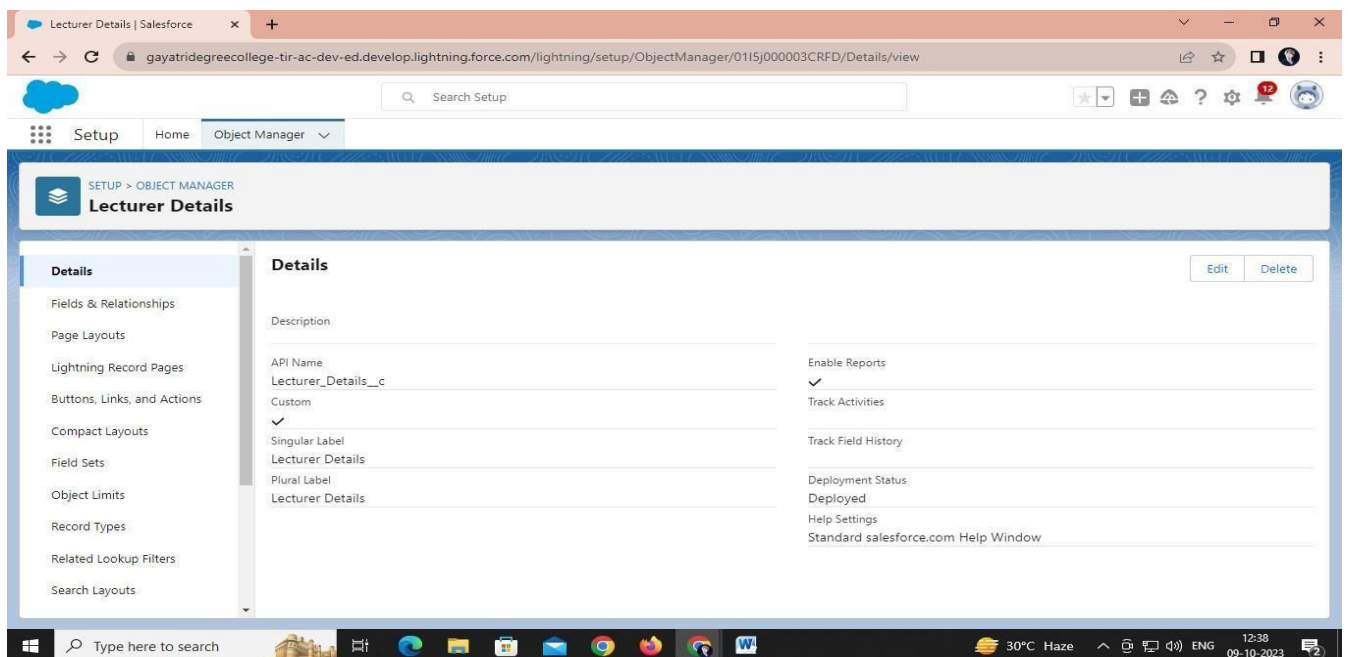
## Object – Course Details

1. Click on the object manager tab just beside the home tab
2. After the above steps, have a look on the extreme right you will find a Create Drop down click on that and select Custom Object.
3. On the Custom Object Definition page, create the object as follows:
4. Label: **Course Details**
5. Plural Label: course details
6. Record Name: course details Name
7. Check the Allow Reports
8. Check the Allow Search 9      Click Save.



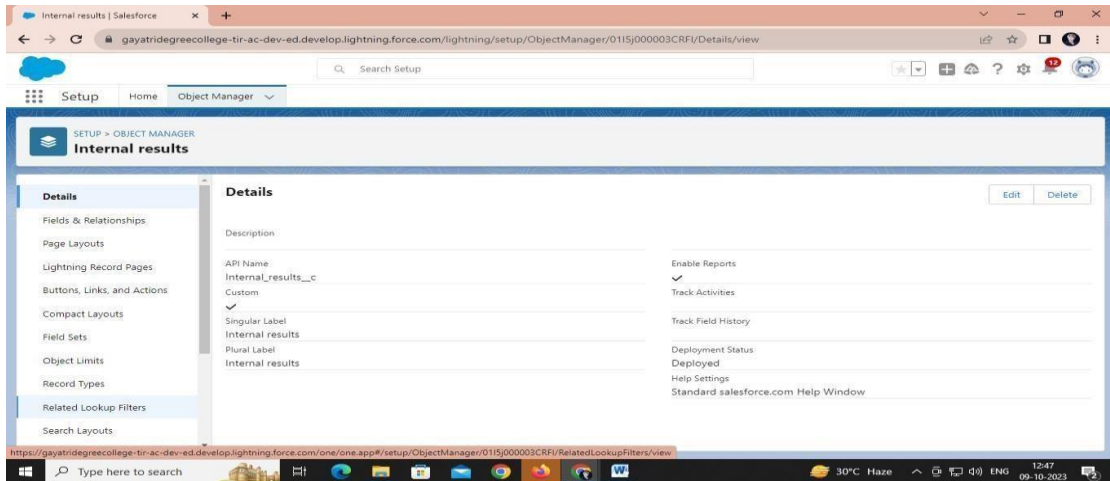
## Object – Lecturer Details

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Drop down click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: **Lecturer Details**
6. Plural Label: Lecturer Details
7. Record Name: Lecturer Details Name
8. Check the Allow Reports
9. Check the Allow Search 10. 10.Click Save.



1. **Object – Internal results**
2. Click on the gear icon and then select Setup.
3. Click on the object manager tab just beside the home tab.

4. After the above steps, have a look on the extreme right you will find a Create Drop down click on that and select Custom Object.
5. On the Custom Object Definition page, create the object as follows:
6. Label: – **Internal results**
7. Plural Label: Internal results
8. Record Name: Internal results Name
9. Check the Allow Reports
10. Check the Allow Search 11. 10.Click Save.



### Milestone – 03: Tabs

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 displays data related to custom objects.
  - c. Web Tabs: Web Tabs display any external Web-based application or Web page in a Salesforce tabs.
  - d. Visual force Tabs: Visual force Tabs display data from a Visual force Page. Creation of semester 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.

## Custom Tabs

[Help for this Page](#)

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs			
		<a href="#">New</a> <a href="#">What Is This?</a>	
Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	Candidates	 Apple	
<a href="#">Edit</a>   <a href="#">Del</a>	Course Detailss	 Bridge	
<a href="#">Edit</a>   <a href="#">Del</a>	Internal resultss	 Train	
<a href="#">Edit</a>   <a href="#">Del</a>	Lecturer Detaillss	 Camera	
<a href="#">Edit</a>   <a href="#">Del</a>	Semesters	 Globe	

### Milestone – 04: 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 –

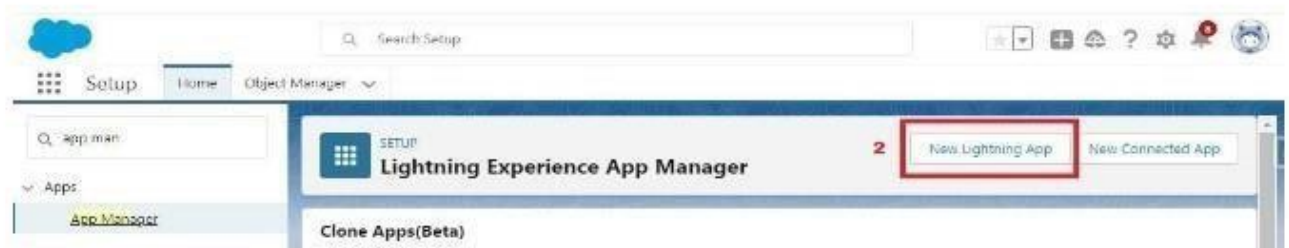
1. **Standard App:** Standard apps come with every occurrence of Salesforce as default. Many features like Sales, Marketing, Community, call center content, Salesforce chatter, App Launcher, etc are present in it. Note: The description, Logo, and Label of standard app cannot be altered.
2. **Custom Apps:** 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, Interna results, Reports, and Dashboards and move them to Selected Items.
7. Click Next

From Available Profiles, select and move it to Selected Profiles. Click Save & Finish. System Administrator







## App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

### App Details

**\* App Name** ⓘ  
Candidate Internal Result Card

**\* Developer Name** ⓘ  
Candidate\_Internal\_Result\_Card

**Description** ⓘ

### App Branding

**Image** ⓘ

Upload

**Primary Color Hex Value** ⓘ

#0070D2

Next

## New Lightning App

### Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

#### Available Items

Dashboards

#### Selected Items

Semesters

Candidates

Course Details

Lecturer Details

Reports

Next

## Milestone – 05: fields and relationship

## 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

Object Name	Field Name	Data type
-------------	------------	-----------

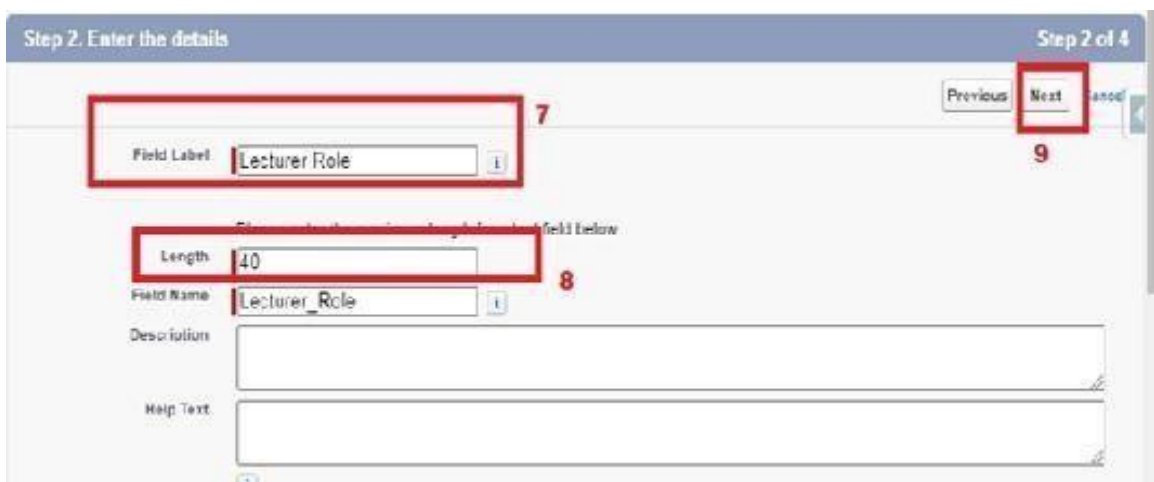
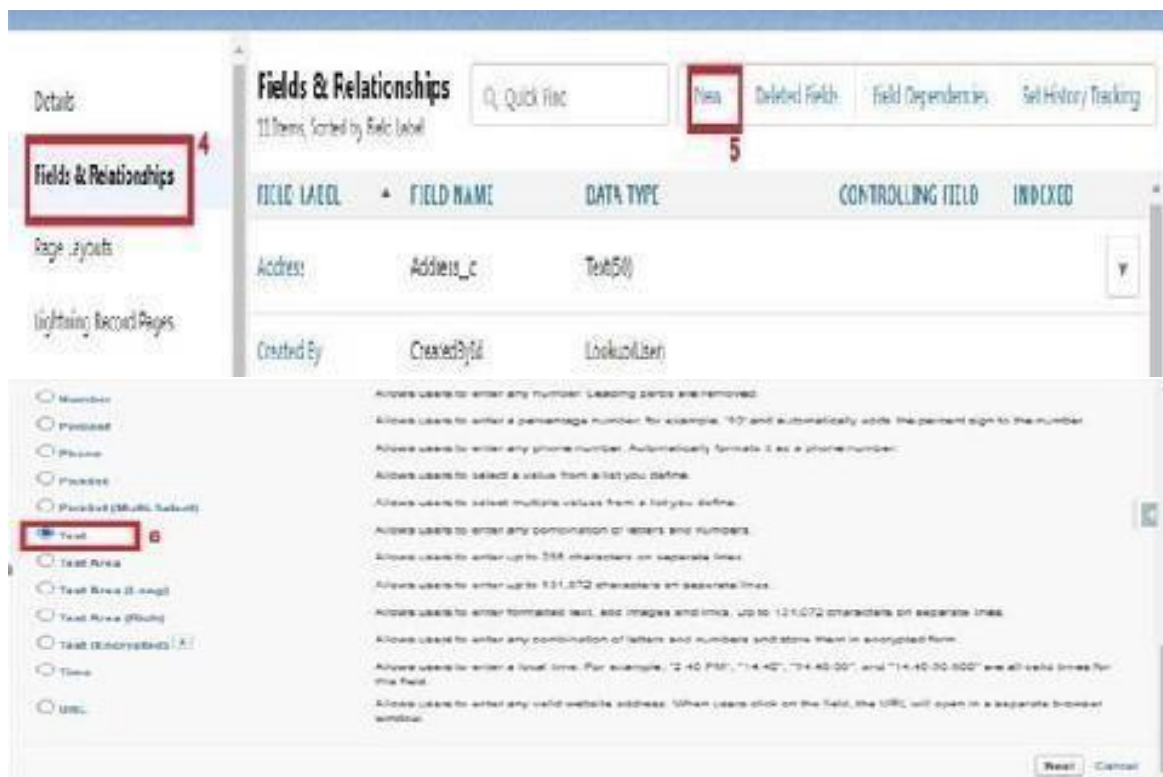
Semester	Semester Name Course	Text(Standard field) Lookup(Course Details)
Candidate	Candidate Name Candidate Roll Number Semester Name	Text(Standard field) Auto Number Lookup(Semester)
Lecturer Details	Lecturer Name Lecturer Role Course	Text(Standard field) Text Lookup(Course)
Course Details	Course Name Duration (Years)	Text(Standard field) Number
Internal results	Candidate Candidate Roll Number Course Marks	Lookup (candidate) Formula Lookup(Course) Number

## Creation Of Text Field On "Lecturer Details" & Look Up

### 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



**Setup > OBJECT MANAGER**  
**Lecturer Details**

Details  
**Fields & Relationships**  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules

Lecturer Details Custom Field  
**Lecturer Role**  
Back to Lecturer Details

Validation Rules (0)

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

**Field Information**

Field Label	Lecturer Role	Object Name	Lecturer_Details
Field Name	Lecturer_Role	Data Type	Text
API Name	Lecturer_Role__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	REDDY BHAVANA V.R. 09/10/2023, 6:22 pm	Modified By	REDDY BHAVANA V.R. 09/10/2023, 6:36 pm

**General Options**

Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>
Case Sensitive	<input type="checkbox"/>
External ID	<input type="checkbox"/>
Default Value	

**Text Options**

Now Let's create a Lookup field on candidate object

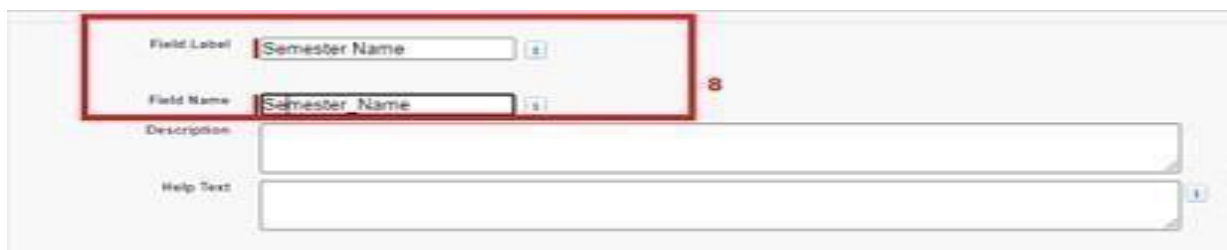
1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select candidate.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the lookup as the Data Type, then click Next.
7. In related select Semester 8.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

Search Setup

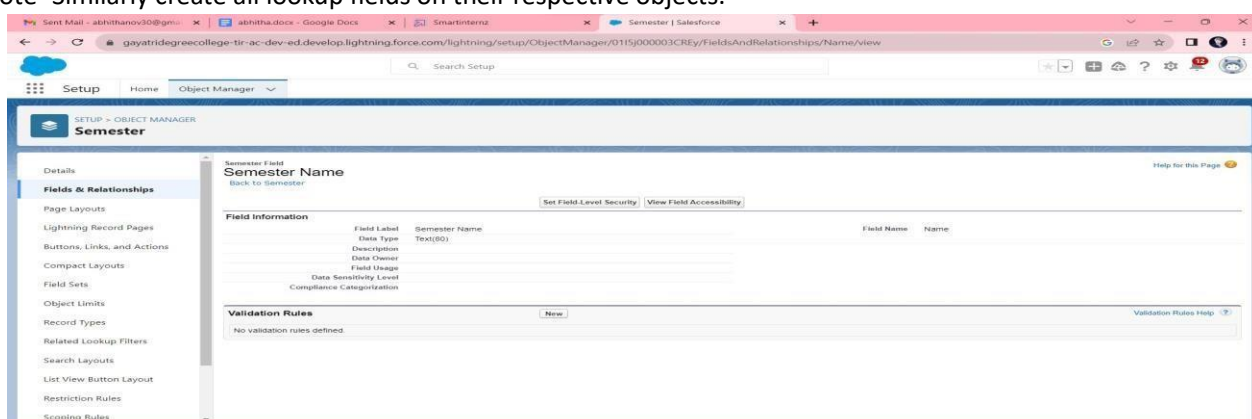
Setup Home **Object Manager**

**Object Manager**  
1 Demo, Sorted by Label

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



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.

The screenshot shows the Salesforce Setup interface. At the top, the 'Setup' tab is selected, and the 'Object Manager' tab is highlighted in the navigation bar. The 'Object Manager' page displays a table of objects. The 'Lecturer Details' object is selected, and its API name 'Lecturer\_Details\_\_c' is highlighted. The 'Fields & Relationships' section is expanded on the left, and the 'New' button is highlighted in the top right of the 'Fields & Relationships' section.

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

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



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 "12345678.80".

Length:  6 Decimal Places:  7

Number of digits to the left of the decimal point: Number of digits to the right of the decimal point:

Field Name:  6

Description:

Help Text:  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.





**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** 6 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: `{GrossMargin * Amount - Cost}_$`

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

☐ DateTime Calculate a datetime, for example, by adding a number of hours or days to another datetime.  
Example: `{Test * 240000} * 1`

☐ Number Calculate a numeric value.  
Example: `{RateUsed} * 1.5 * {Cost}_$ * 22`

☐ Percent Calculate a percent and automatically add the percent sign to the number.  
Example: `{Discount} * (Amount - Discounted_Amount_$$) / Amount`

☒ **Text** 8 Create a text string, for example, by concatenating other text fields.  
Example: `{Full Name & " " & LastName} & " " & FirstName`

Example: `Full Name = LastName & " " & FirstName` [More Examples...](#)

Simple Formula ☒ Advanced Formula

**Insert Field** 9

`Candidate Roll Number (Text) =`

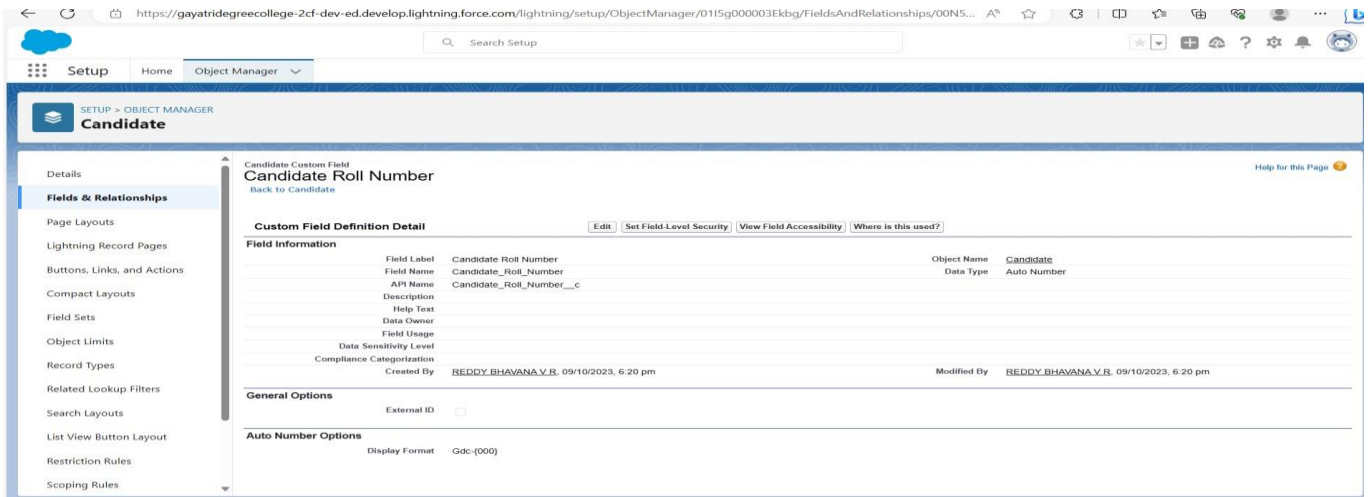
**Functions**  
-- All Function Categories --  
ABS  
ACOS  
ADDMONTHS  
AND  
ASCII  
ASIN

**Insert Field** 10

Select a field, then click Insert. Labels followed by a ">" indicate that there are more fields available.

Internal results > \$Api > \$Organization > \$Profile > \$System > \$User > \$UserRole >	Candidate > Candidate > Created By > Created By ID Created Date Internal results Name Last Modified By > Last Modified By ID Last Modified Date	Address Candidate Name <b>Candidate Roll Number</b> City Created By > Created By ID Created Date Education Email
--	---	--

You have selected:  
`Candidate__r.Candidate_Roll_Number__c`  
Type: Auto Number  
API Name: `Candidate__r.Candidate_Roll_Number__c`



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

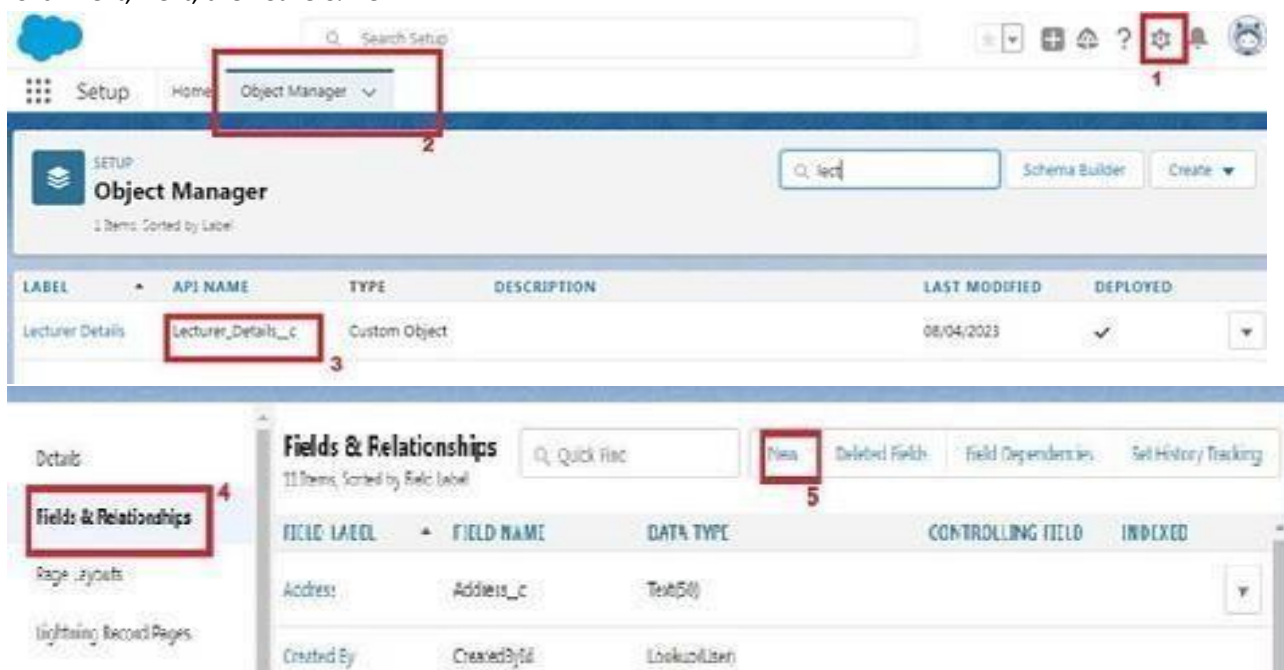
5. Click New

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.



None Selected Select one of the data types below:

☒ Auto Number 6 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.

☐ Roll-Up Summary 1 A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

---

Candidate  
New Custom Field Help for this Page

Step 2. Enter the details Step 2 of 4

Previous **Next** Cancel

Field Label  7

Display Format  Example: A-(0000): What is This?

Starting Number  8

☐ Generate new numbers for existing records

Field Name  9

Description

Help Text

## Milestone – 06: users

# Creating A User

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.
- 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.
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.

**Setup** Home Object Manager

**Users**

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: **All Users** Edit Create New User

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	1. User	u1	utkarsh2@vanshiv.com	Operator 1	✓	operator
<input type="checkbox"/> Edit	2. User	u2	utkarsh3@vanshiv.com	Operator 2	✓	operator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chattv00g2w00000rs8akeaj.mujroki@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Technologies Vanshiv	VTech	vehicledemo@vanshiv.com		✓	System Administrator
<input type="checkbox"/> Edit	Teddy John	j.ted	utkarsh1@vanshiv.com	Vehicle Manager	✓	Vehicle Manager

**User Edit** Save Save & New Cancel

**General Information**

First Name:  Last Name:  Alias:  Email:  Username:  Nickname:  Title:  Company:  Department:

Role:  User License:  Profile:  Active: ☒

Marketing User ☐ Offline User ☐ Knowledge User ☐ Flow User ☐ Service Cloud User ☐

## Milestone – 07: user adoption

# 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.

The first screenshot shows the application's top navigation bar with the 'Course Details' tab highlighted. Below the navigation bar, the 'Course Details' section is visible, showing a 'Recently Viewed' list with 0 items. A 'New' button is highlighted in the top right corner of this section.

The second screenshot shows the 'New Course Details' form. The 'Course Name' field is filled with 'MBA' and the 'Duration' field is filled with '2'. The 'Owner' field shows 'Vanshiv Technologies'. The 'Save' button is highlighted in the bottom right corner of the form.

The third screenshot shows the 'Recently Viewed' list of courses. The list contains four items: MBA (Finance), Btech, BSc, and BCA. The 'Save' button is highlighted in the bottom right corner of the form.

## 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



The screenshot illustrates the process of deleting a record in the Oracle HR Cloud system. It shows the navigation from the App Launcher to the 'Candidate Internal Result Card' app, then to the 'Course Details' tab. A table lists four course details: BCA, BSc, Btech, and MBA. The 'MBA' record is highlighted, and a red box indicates the delete icon (an arrow pointing to the right) next to it.

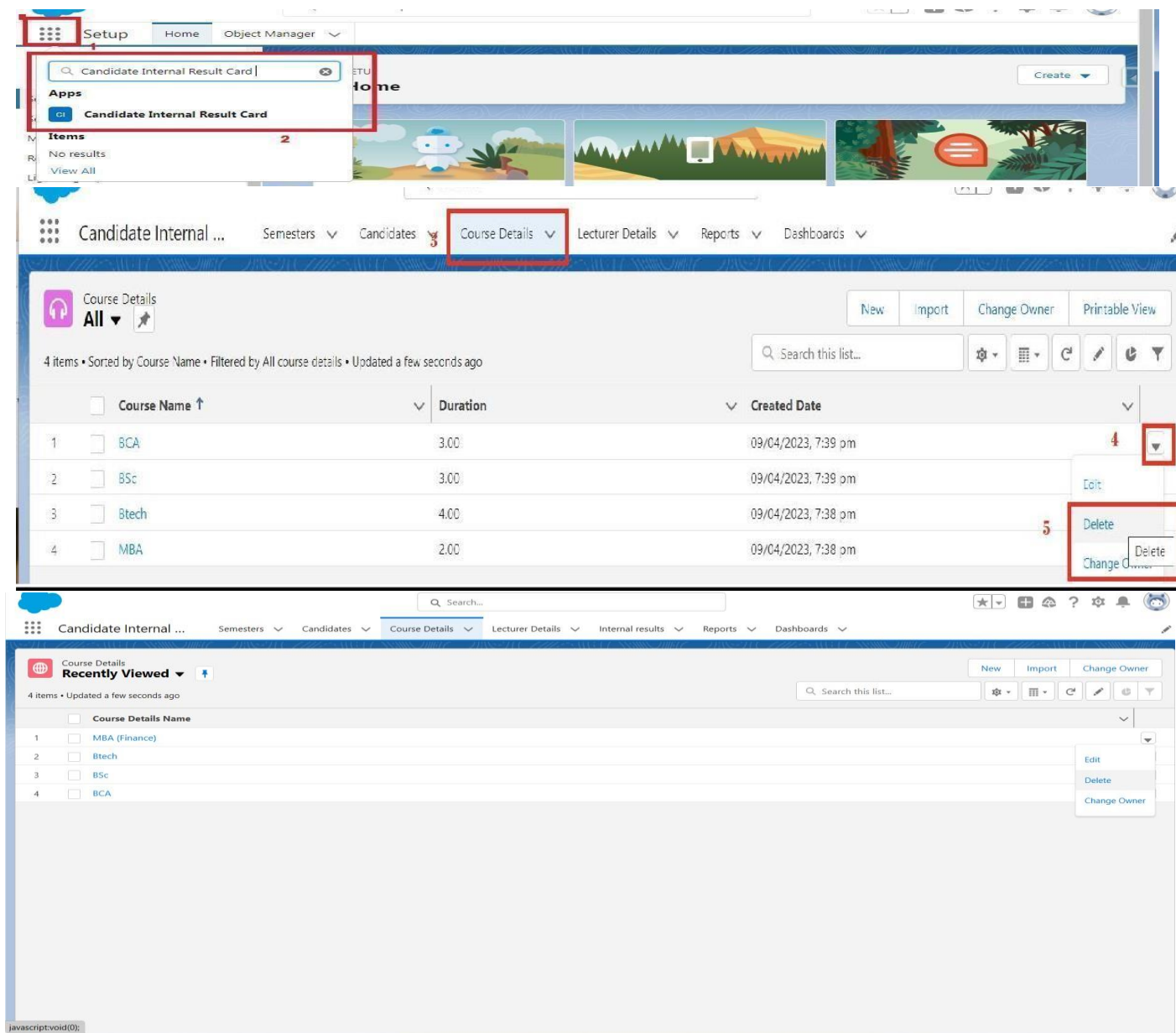
	Course Name ↑	Duration	Created Date
1	BCA	3.00	09/04/2023, 7:39 pm
2	BSc	3.00	09/04/2023, 7:39 pm
3	Btech	4.00	09/04/2023, 7:38 pm
4	MBA	2.00	09/04/2023, 7:38 pm

Below the table, the 'Details' view for the 'MBA (Finance)' record is shown, including fields for Course Details Name, Duration, Course Name, Created By, and Last Modified By.

## 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.



## Milestone – 08: what are Reports?

# 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:

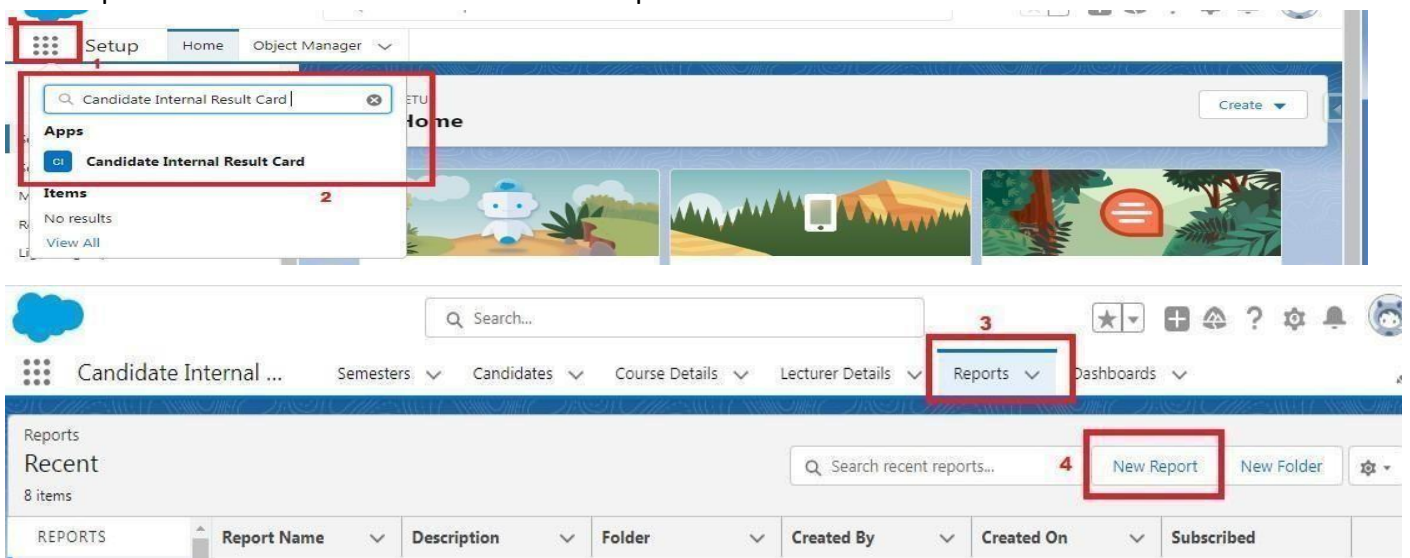
**Viewer:** With this access level, users can see the data in a report but cannot make any changes except cloning it into a new report

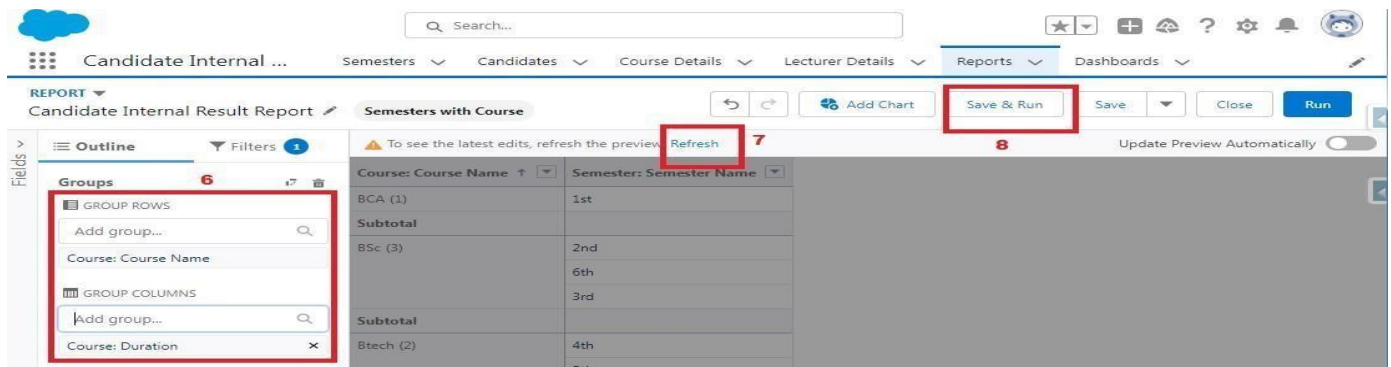
Editor: With this access level, users can view .

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.

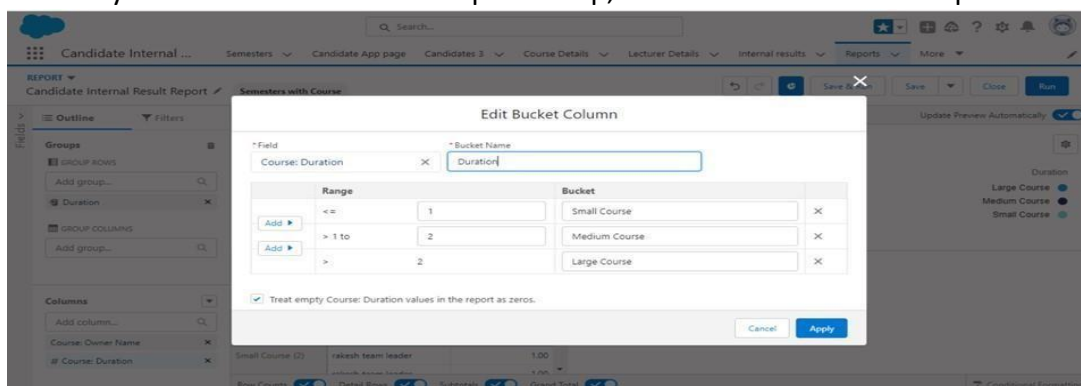
## Create Report

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





1. On the report builder page, locate the "Fields" pane on the left-hand side.
2. Find the field for which you want to create a bucket field and drag it to the report preview section.
3. Click on the field in the report preview to open the field properties.
4. In the field properties, locate the "Summarize" option and click the drop-down arrow.
5. Select "Bucket Field" from the available options.
6. In the bucket field settings, define the buckets based on your requirements. You can specify the bucket ranges, labels, and groupings.
7. 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.



### Save Report

Report Name
Candidate Internal Result Report
9

Report Unique Name
Candidate\_Internal\_Result\_Report\_bkY

Report Description

Cancel
Save
10

## 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.

The screenshot shows the system interface with the following steps highlighted:

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.

The interface shows the 'Candidate Internal Result Card' app selected, and the 'Reports' tab is active. The 'Recent' reports list is displayed, showing the 'Candidate Internal Result Report' as the selected item.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Properties with Customer Name Report		Private Reports		8/4/2023, 12:48 pm	
Created by Me	Events with Attendees		Private Reports		6/4/2023, 4:35 pm	
Private Reports	Candidate Internal Result Report		Private Reports		9/4/2023, 7:57 pm	
Public Reports	job application with candidate name		Private Reports		8/4/2023, 7:08 pm	
All Reports						



Report: Semesters with Course

## Candidate Internal Result Report

Total Records

7

Course: Course Name ↑	Semester: Semester Name	Course: Course Details Name	Duration
B.Tech (2)	Semester 03	B.Tech (Mechanical)	Large Course
	Semester 02	B.Tech (Automobile)	Large Course
Subtotal			
BCA (1)	Semester 06	BCA (Data Science)	Small Course
Subtotal			
BSC (3)	Semester 04	B.SC (Nursing)	Medium Course
	Semester 05	B.Sc (Bio Technology, Chemistry, Computer Applications)	Medium Course
	Semester 07	B.Sc (Bio Technology, Chemistry, Computer Applications)	Medium Course
Subtotal			
MBA (1)	Semester 01	MBA (Finance)	Large Course
Subtotal			
Total (7)			

### Milestone – 06: dashboards

## Dashboards

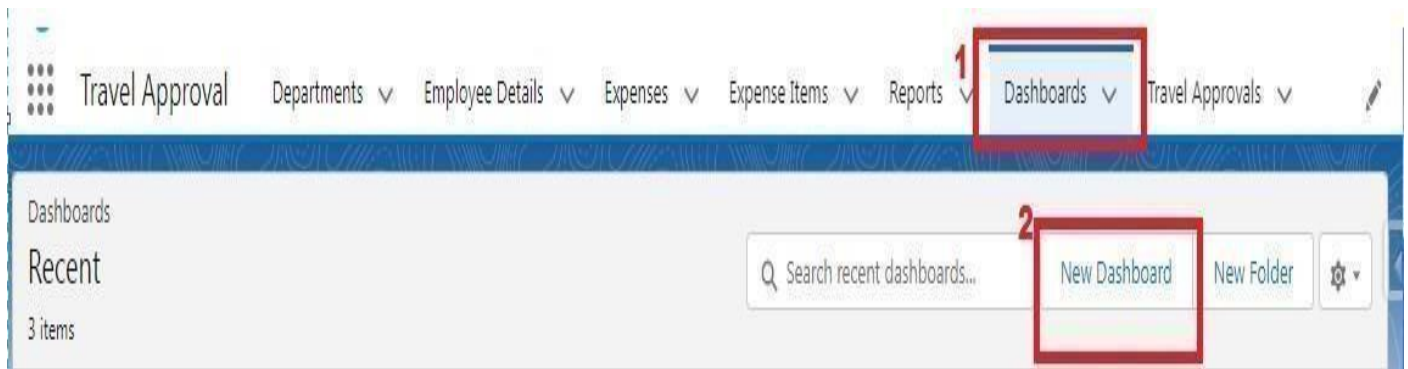
Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then they are able to view your dashboard's data-supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

## 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.



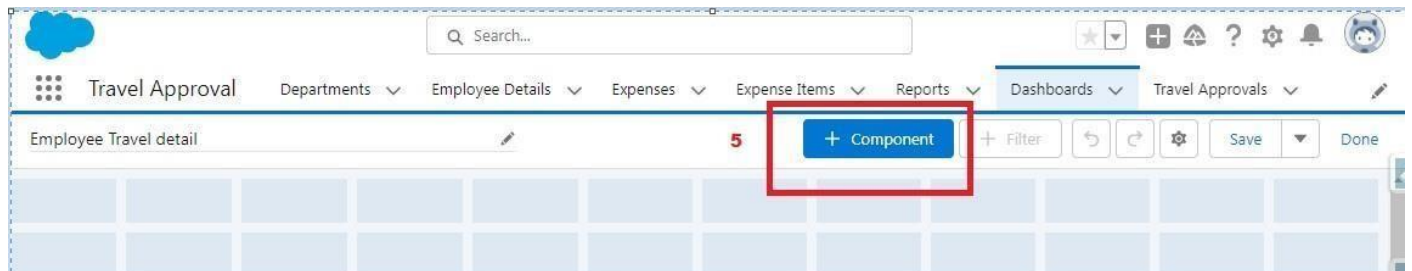
### New Dashboard

\*Name

Description **3**

Folder

4



### Add Component

Report:

☐ Use chart settings from report

Display As **7**

X-Axis

Preview

Candidate Internal Result Report

Record Count

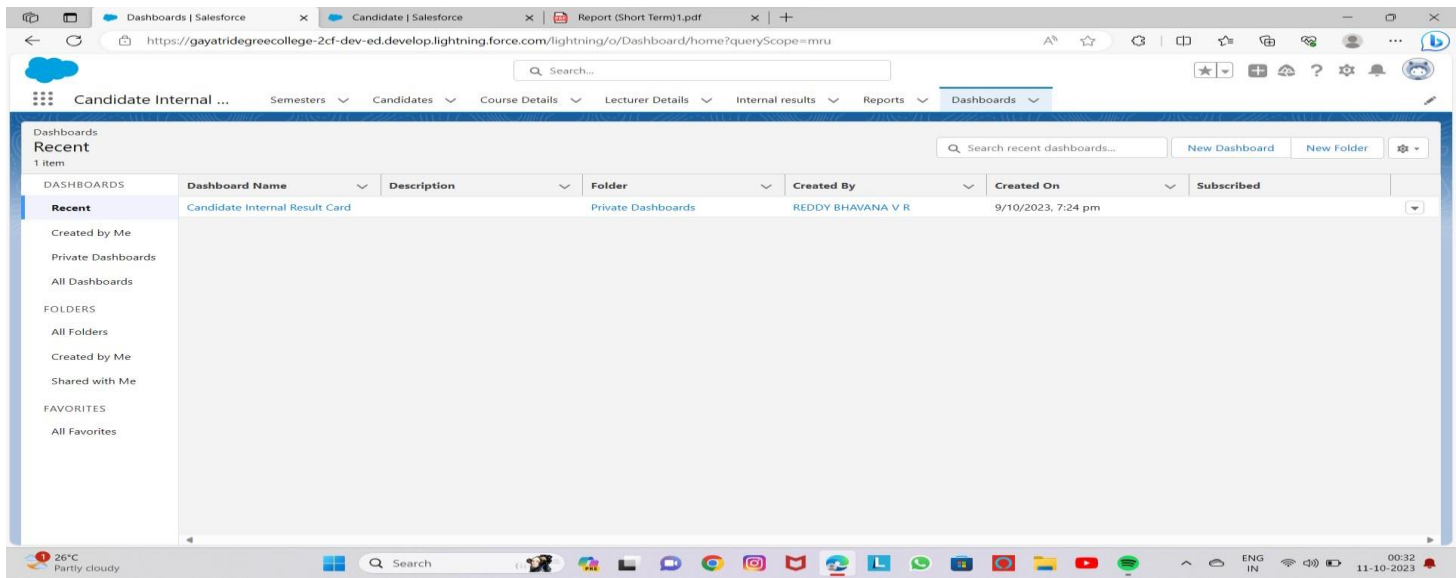
Course	Record Count
BCA	1
BSc	3
Btech	2
MBA	1

Course: Course Name

View Report (Candidate Internal Result Report)

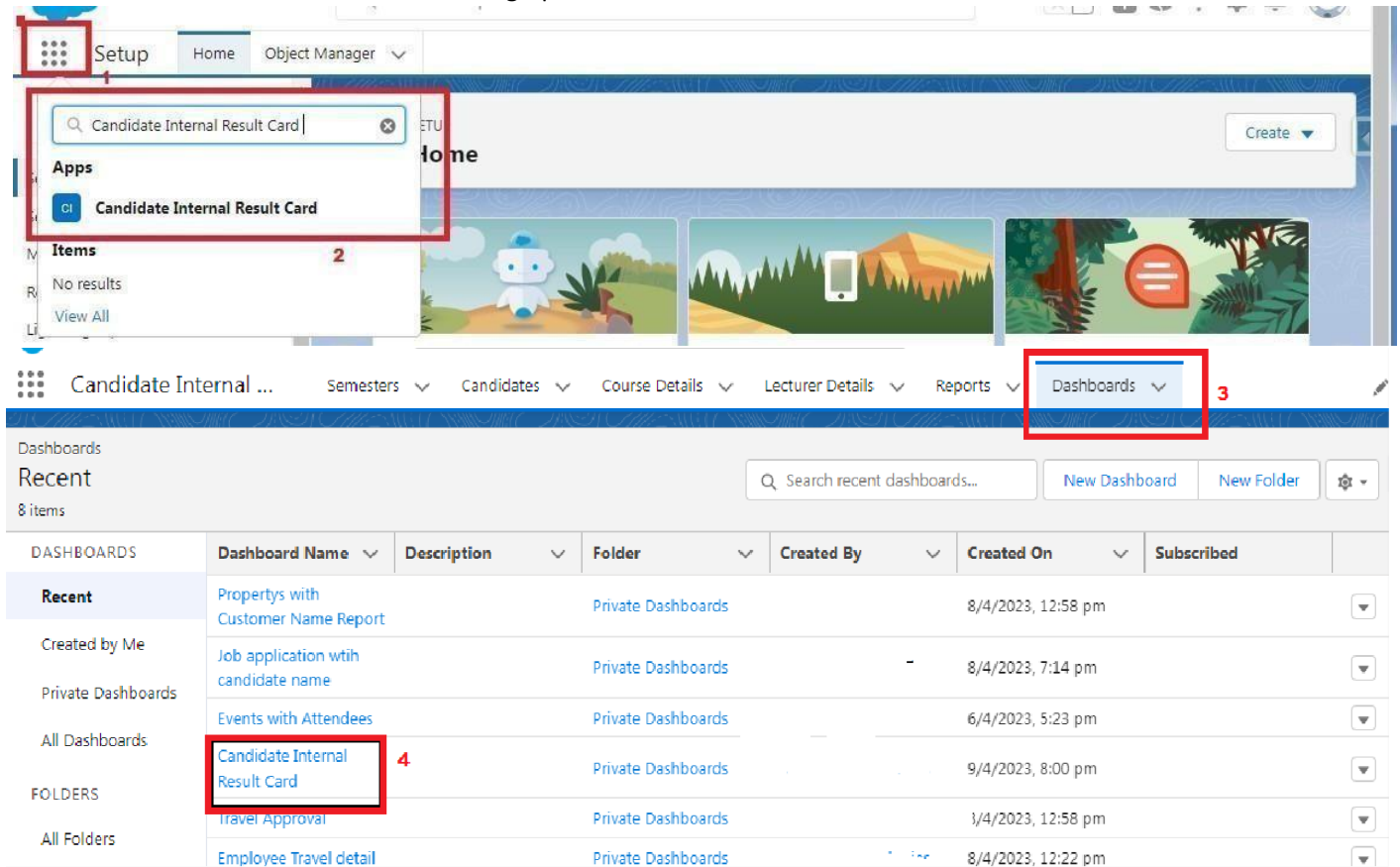
8





## 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





[View Report \(Candidate Internal Result Report\)](#)

# THEEND

