

PROJECT REPORT ON
Implementing CRM for Result Tracking of a Candidate with Internal Marks
(ADMIN) - (Short-term)

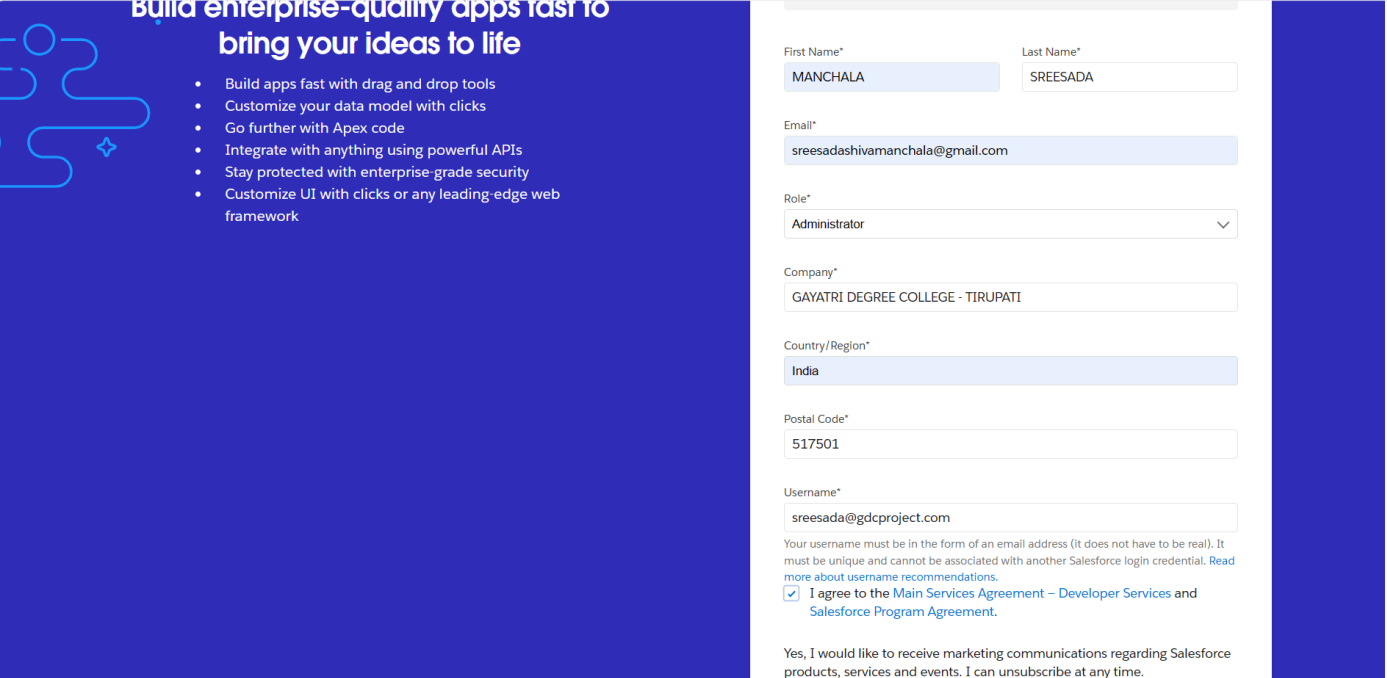
Introduction: The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help to those professionals who are in cross-technology and wanted to switch to Salesforce with the help of this project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

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

Click on sign up.

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

1. First name & Last name – MANCHALA SREESADA
2. Email –sreesadashivamanchala@gmail.com
3. Role: Administrator
4. Company: GAYATRI DEGREE COLLEGE - TIRUPATI
5. County: India
6. Postal Code: 517501



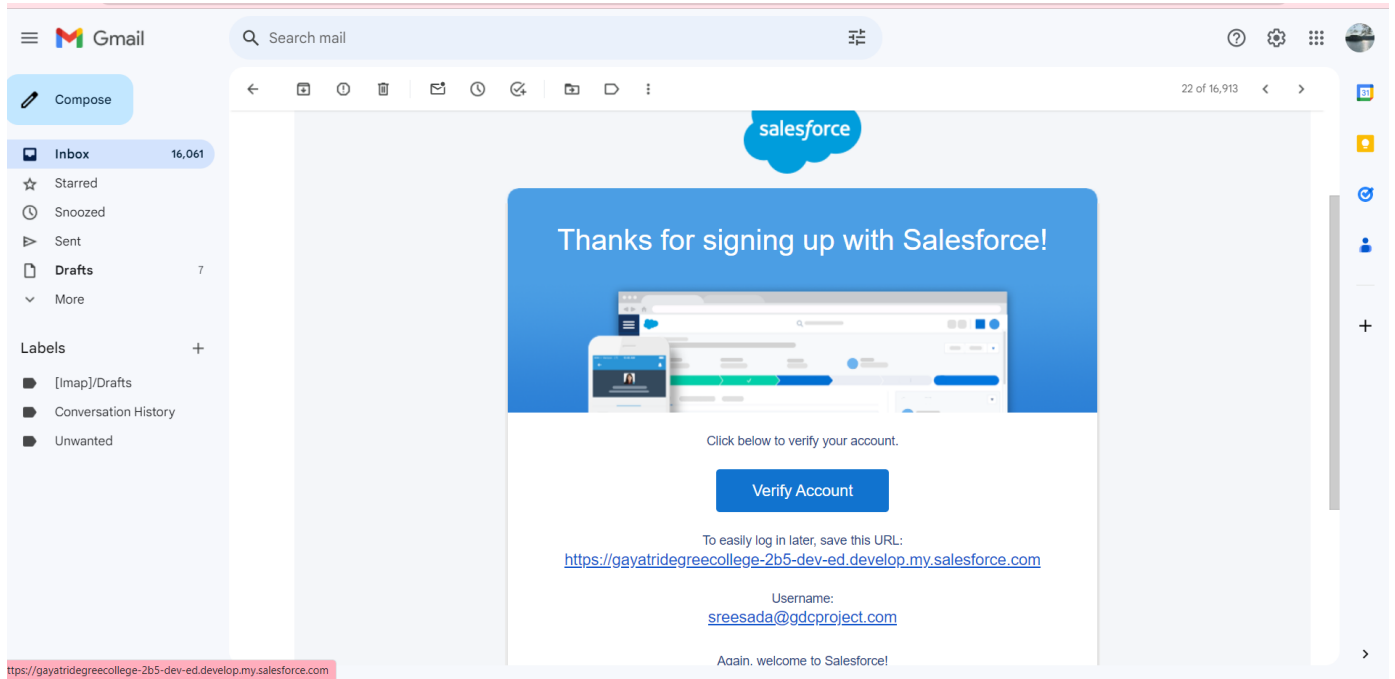
The screenshot shows the Salesforce Developer Signup page. On the left, there is a blue banner with the text "Build enterprise-quality apps fast to bring your ideas to life" and a list of bullet points: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". On the right, the signup form is displayed with the following fields filled out: First Name: MANCHALA, Last Name: SREESADA, Email: sreesadashivamanchala@gmail.com, Role: Administrator (selected from a dropdown), Company: GAYATRI DEGREE COLLEGE - TIRUPATI, Country/Region: India, Postal Code: 517501, and Username: sreesada@gdcproject.com. Below the username field, there is a note: "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.](#)" and a checked checkbox for "I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement." At the bottom, there is a checkbox for "Yes, I would like to receive marketing communications regarding Salesforce products, services and events. I can unsubscribe at any time."

7. Username: sreesada@gdcproject.com

8.

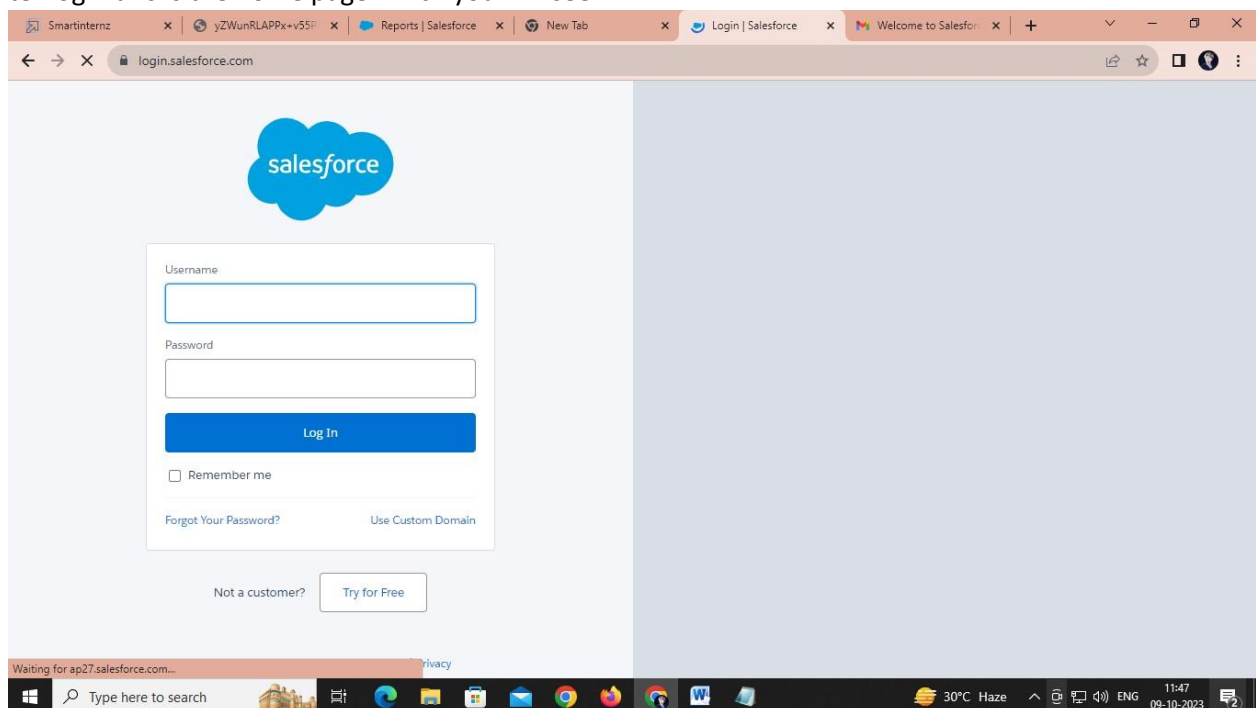
Account Activation

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

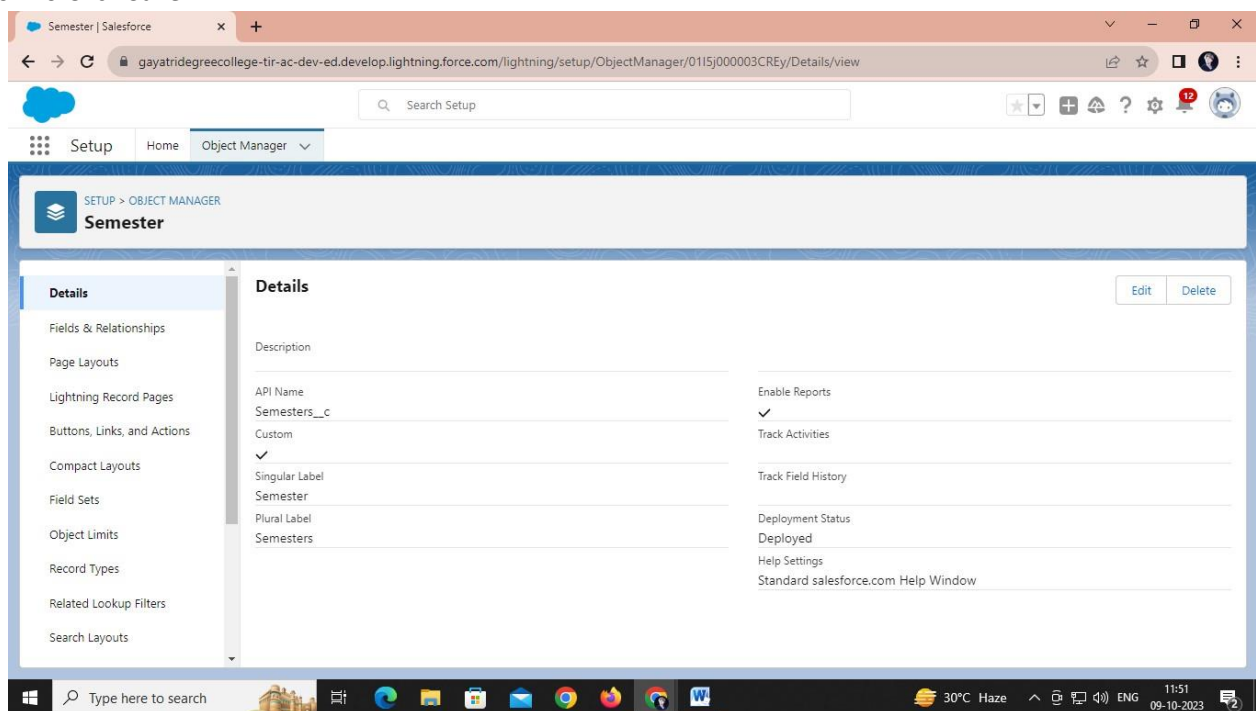
1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



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.

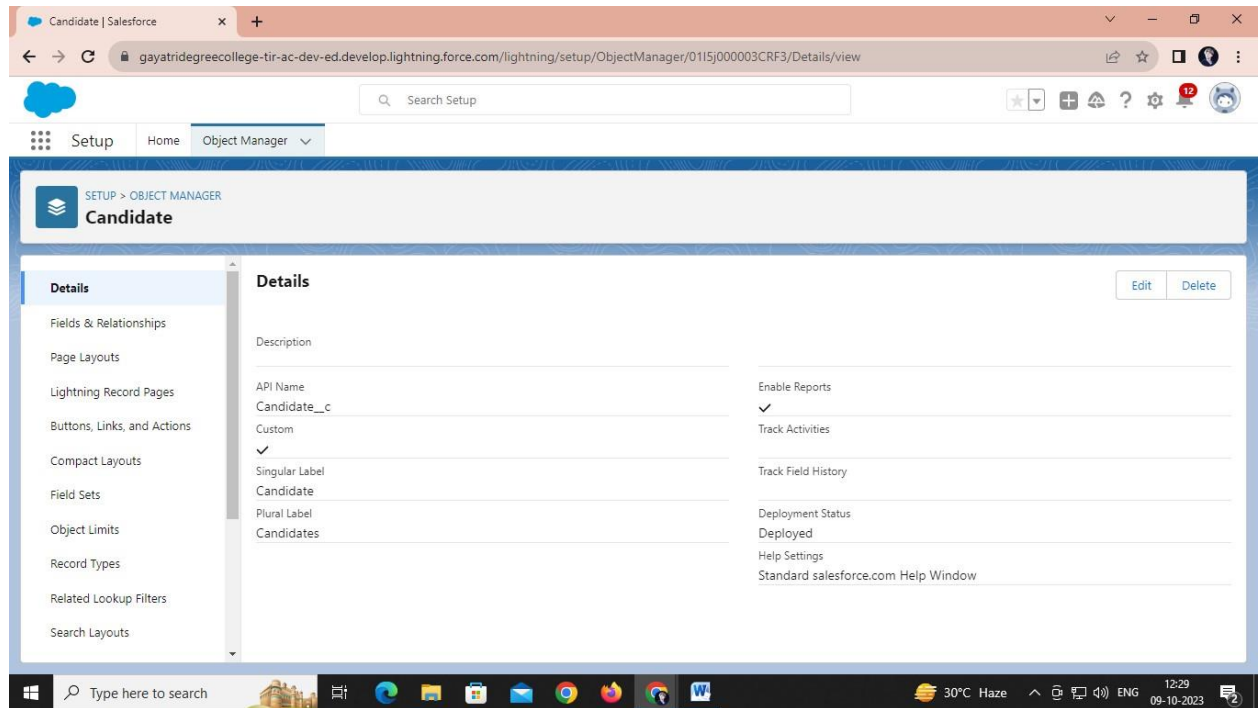


Object – Candidate

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

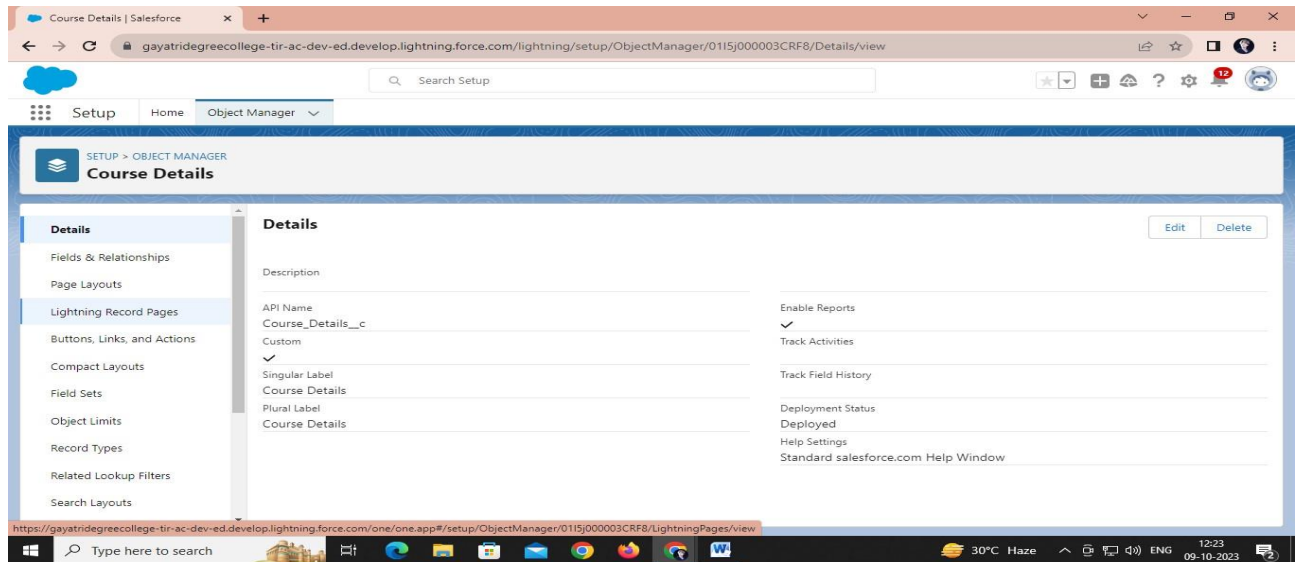
9. Check the Allow Search

10. Click Save



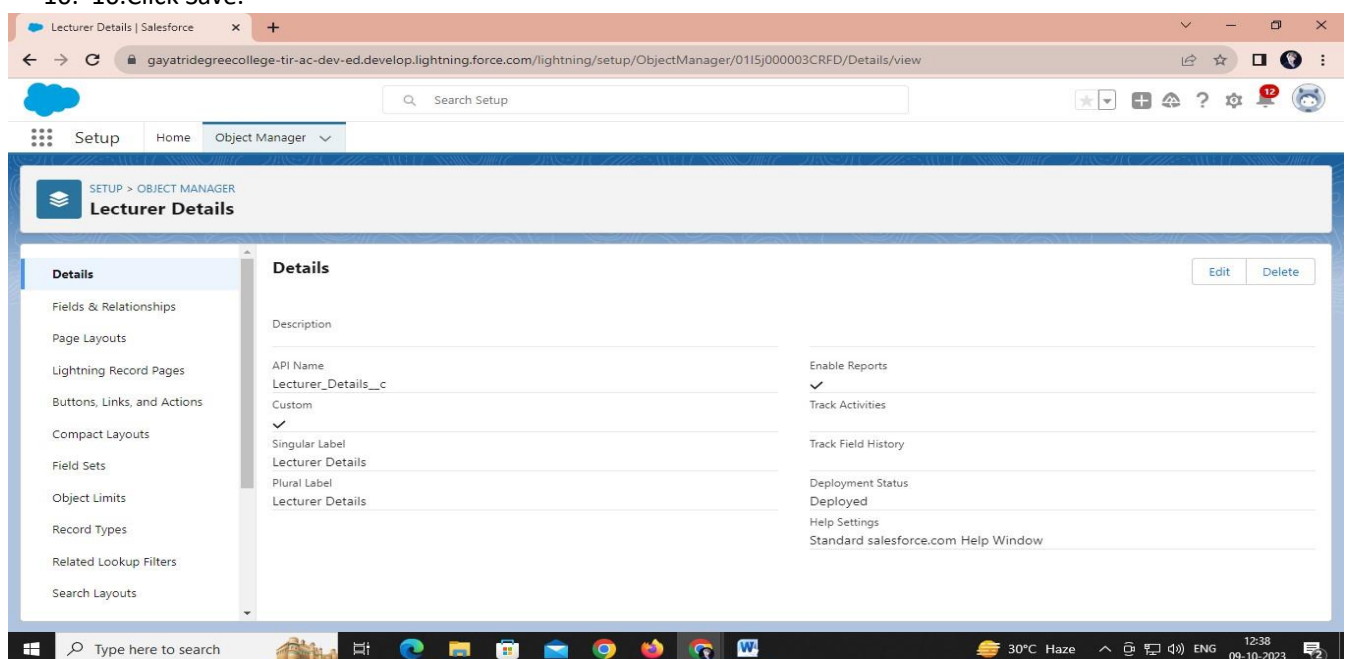
Object – Course Details

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.

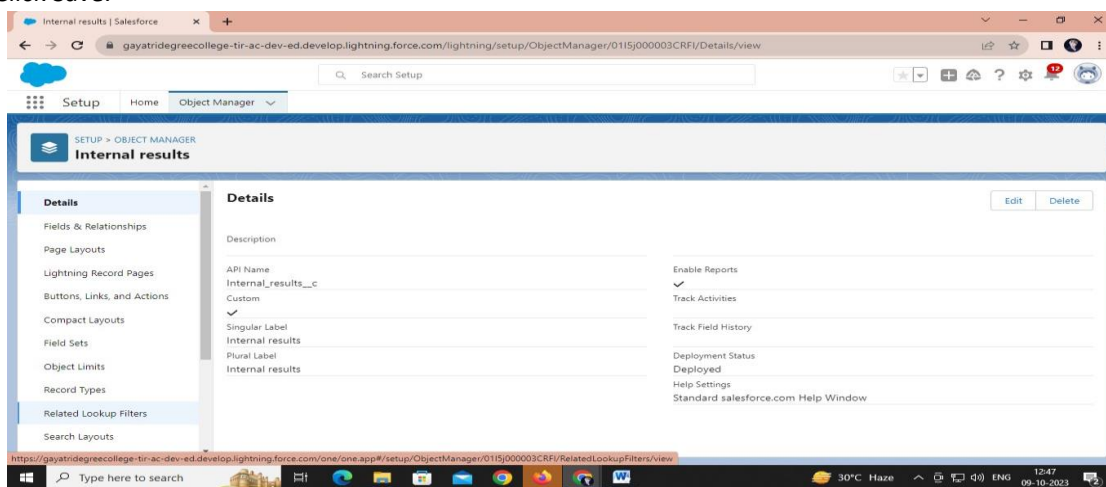


Object – Lecturer Details

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		New	What Is This?
Action	Label	Tab Style	Description
Edit Del	Candidates	 Apple	
Edit Del	Course Detailss	 Bridge	
Edit Del	Internal resultss	 Train	
Edit Del	Lecturer Detailss	 Camera	
Edit Del	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.

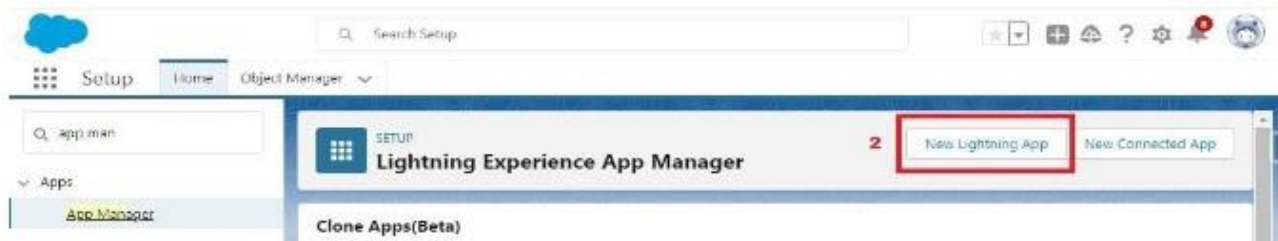
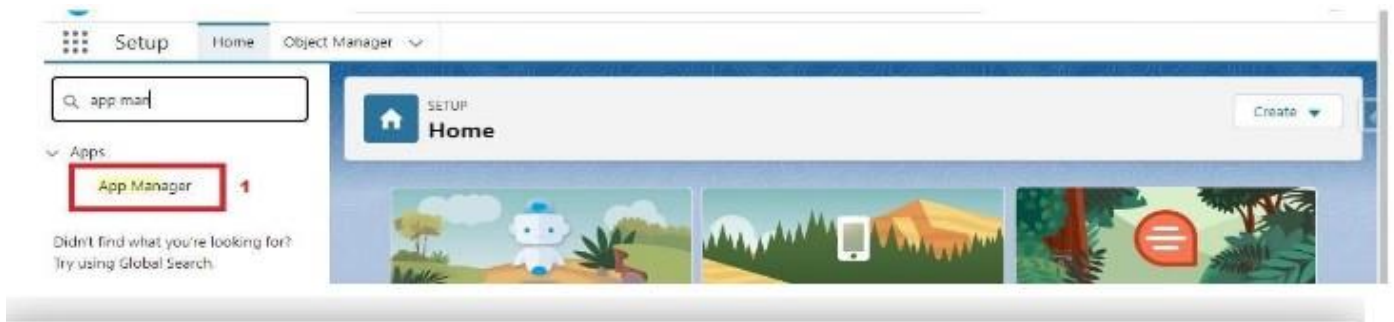
Note: The description, Logo, and Label of standard app cannot be altered.

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** ¹

Candidate Internal Result Card


*** Developer Name** ¹

Candidate_Internal_Result_Card


Description ¹

App Branding

Image ¹

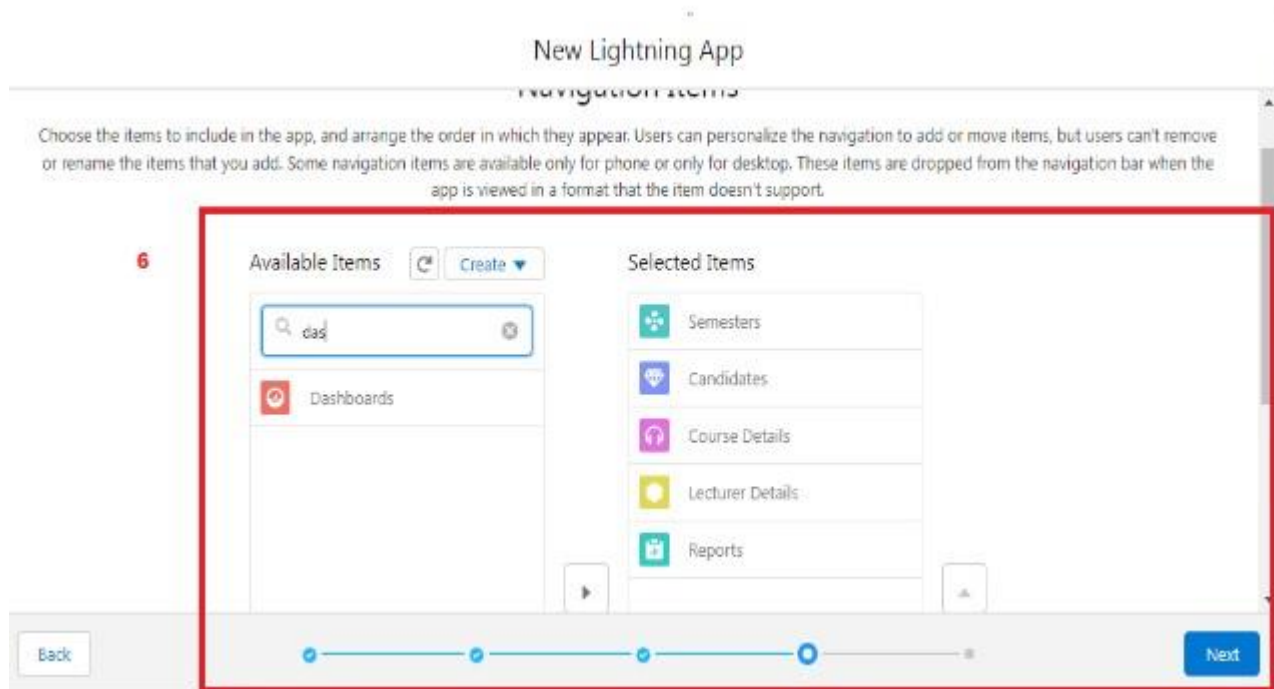
 Upload

Primary Color Hex Value ¹

 #0070D2

Progress bar with 5 steps, the first step is active.

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



Number
Percent
Phone
Picklist
Picklist (Multi-Select)
Text
Text Area
Text Area (Long)
Text Area (Rich)
Text (Encrypted)
Time
URL

Allows users to enter any number. Leading zeros are removed.
Allows users to enter a percentage number. For example, "10" and automatically adds the percent sign to the number.
Allows users to enter any phone number. Automatically formats it as a phone number.
Allows users to select a value from a list you define.
Allows users to select multiple values from a list you define.
Allows users to enter any combination of letters and numbers.
Allows users to enter up to 355 characters on separate lines.
Allows users to enter up to 131,072 characters on separate lines.
Allows users to enter formatted text, and images and links. Up to 131,072 characters on separate lines.
Allows users to enter any combination of letters and numbers and store them in encrypted form.
Allows users to enter a local time. For example, "2:40 PM", "1:4:40", "3:4:40:00", and "1:4:40:00:00" are all valid times for this field.
Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

Step 2: Enter the details Step 2 of 4

Previous Next Add

Field Label **Lecturer Role**

Length **40**

Field Name **Lecturer_Role**

Description

Help Text

Setup Search Setup

Setup Home Object Manager

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)

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

Field Information		Object Name	Lecturer Details
Field Label	Lecturer Role	Data Type	Text
Field Name	Lecturer_Role		
API Name	Lecturer_Role__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	MANCHALA SREESADA	Modified By	MANCHALA SREESADA
	10/10/2023, 8:32 am		10/10/2023, 8:32 am

General Options

Required ☐
Unique ☐
Case Sensitive ☐
External ID ☐
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.

1

2

3

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

4

5

6

7

Fields & Relationships

11 Items, Sorted by Field Label

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

Lookup Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Step 2: Choose the related object

Select the other object to which this object is related:

Related To: **Semester**

Field Label: Semester Name

Field Name: Semester Name

Description:

Help Text:

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

Setup - OBJECT MANAGER

Semester

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

Semester Field

Semester Name

Back to Semester

Set Field-Level Security View Field Accessibility

Field Information

Field Label	Semester Name	Field Name	Name
Data Type	Text(80)		
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Validation Rules

No validation rules defined

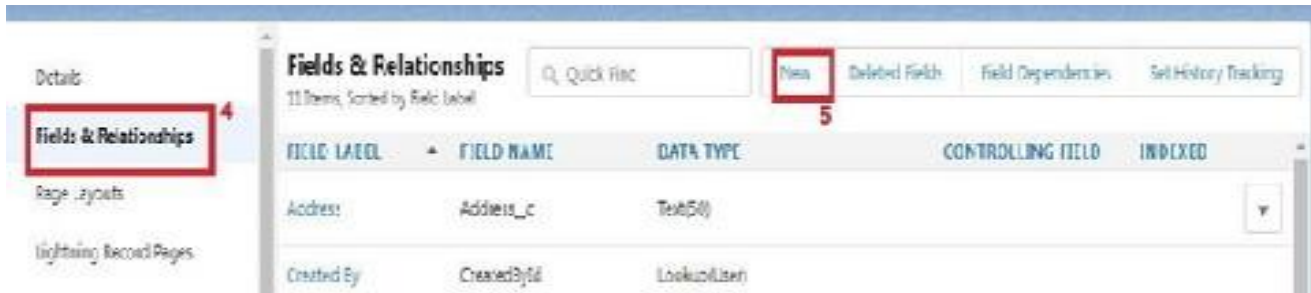
New

Validation Rules Help

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.



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

Home

Object Manager

Search Setup

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	✓

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Fields & Relationships

11 Items, Sorted by Field label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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

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

Field Name

Candidate_Roll_Number

Auto add to custom report type

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

Formula Return Type

None Selected

Select one of the data types below.

Text

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

Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `{!GrossMargin * Amount - Cost__c}`

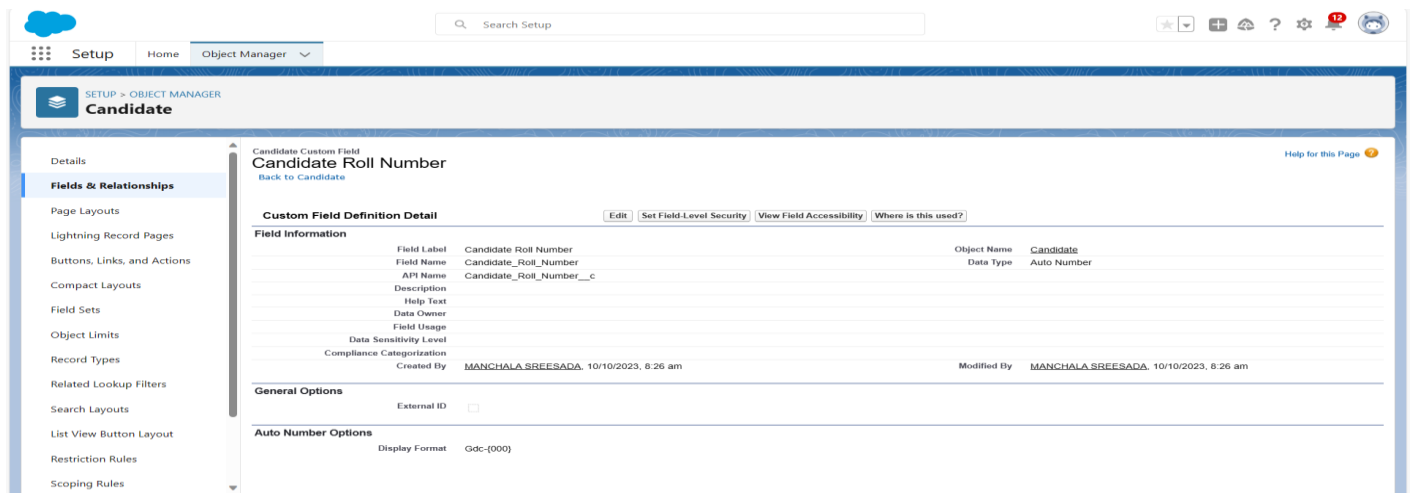
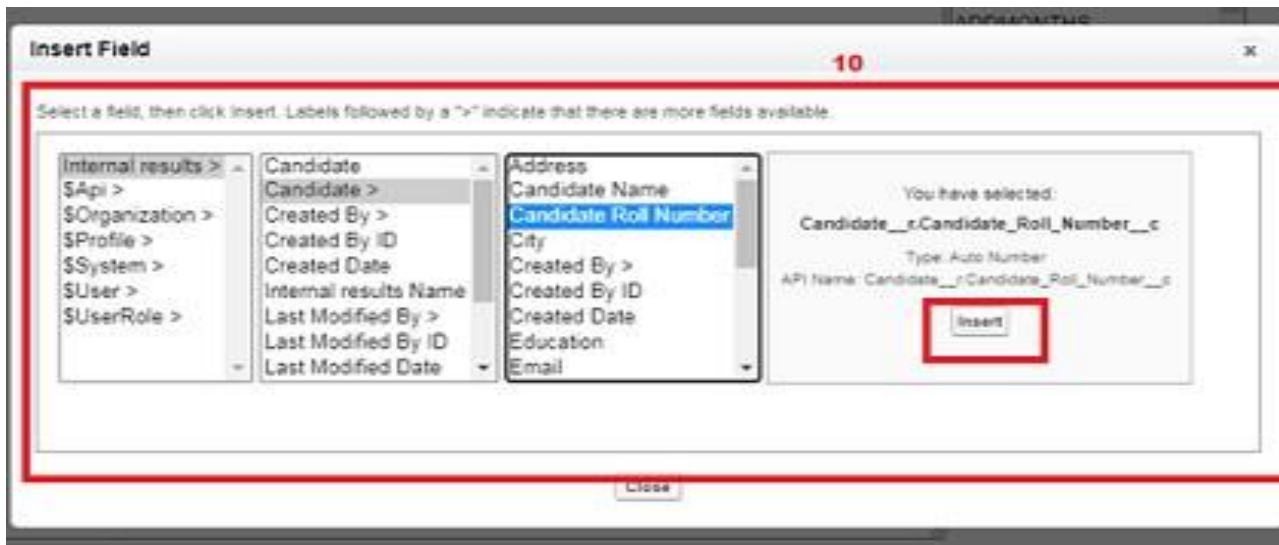
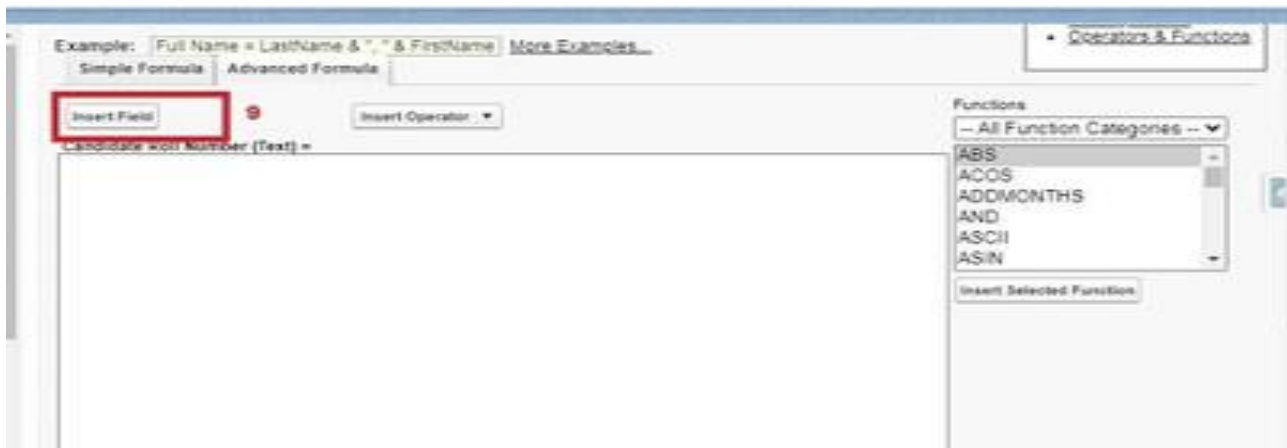
Calculate a date, for example, by adding or subtracting days to other dates.
Example: `{!ReorderDate + CloseDate - 7}`

Calculate a datetime, for example, by adding a number of hours or days to another datetime.
Example: `{!Text * 24 * 60 * 60 + 5}`

Calculate a numeric value.
Example: `{!Fahrenheit * 1.8 + Celsius__c + 32}`

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

Create a text string, for example, by concatenating other text fields.
Example: `{!Full Name & "Lastname & " & S. & Firstname}`



- 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.



Candidate New Custom Field

Step 2 of 4

Field Label: 7

Display Format: Example: A-{0000} What is This?

Starting Number: 8

☐ Generate Auto Number for existing records

Field Name: 9

Description:

Help Text: 8

Previous Next

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.

Milestone – 07: user adoption

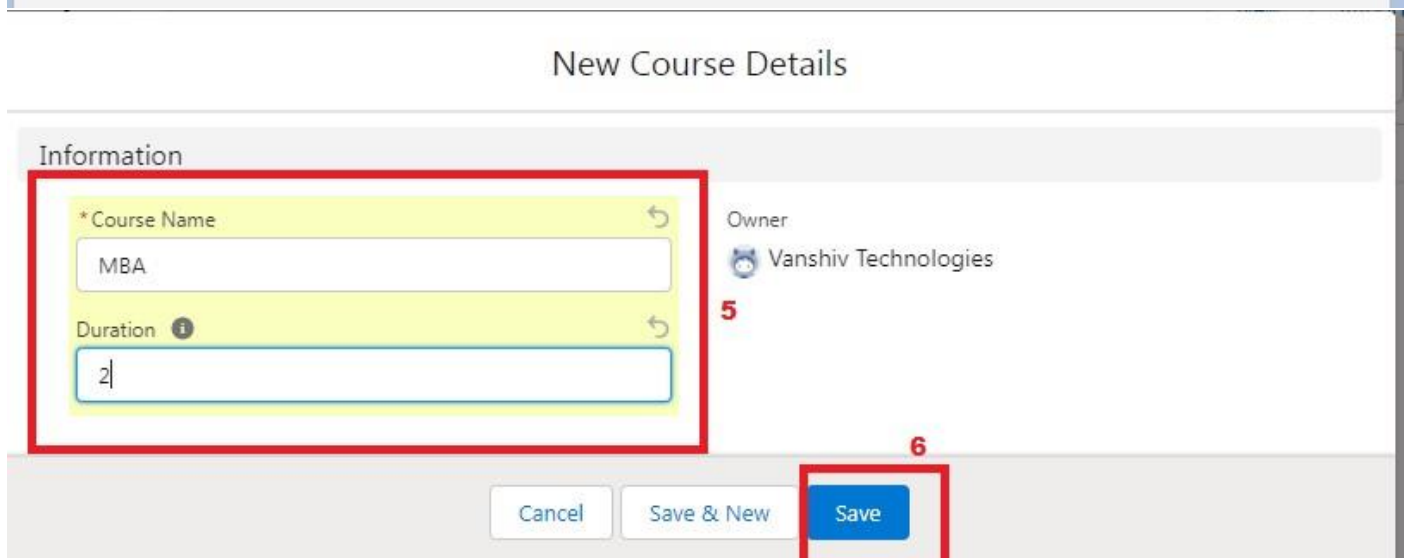
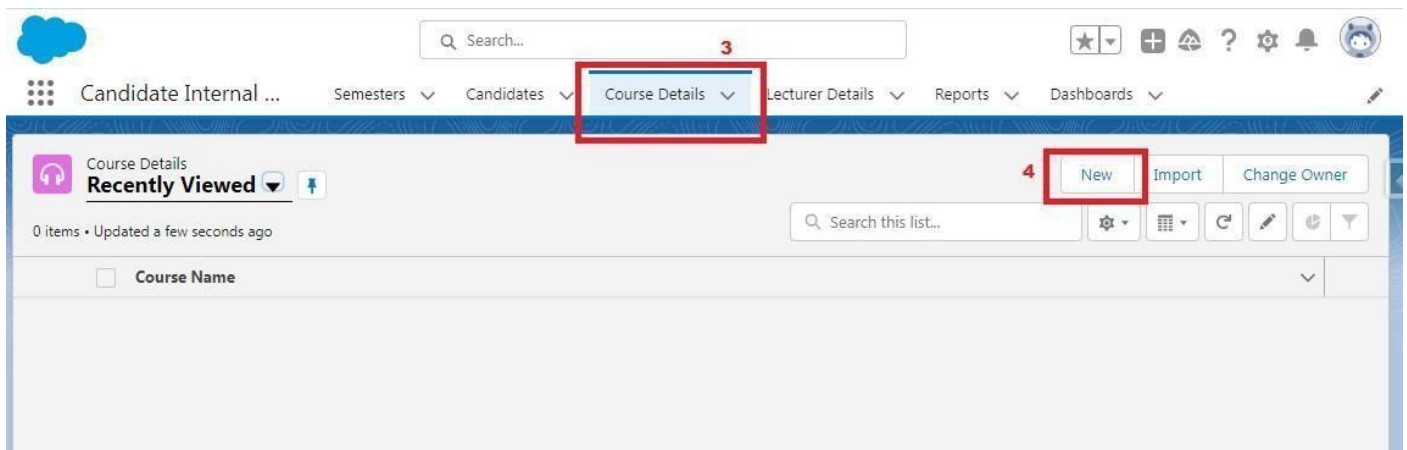
User Adoption

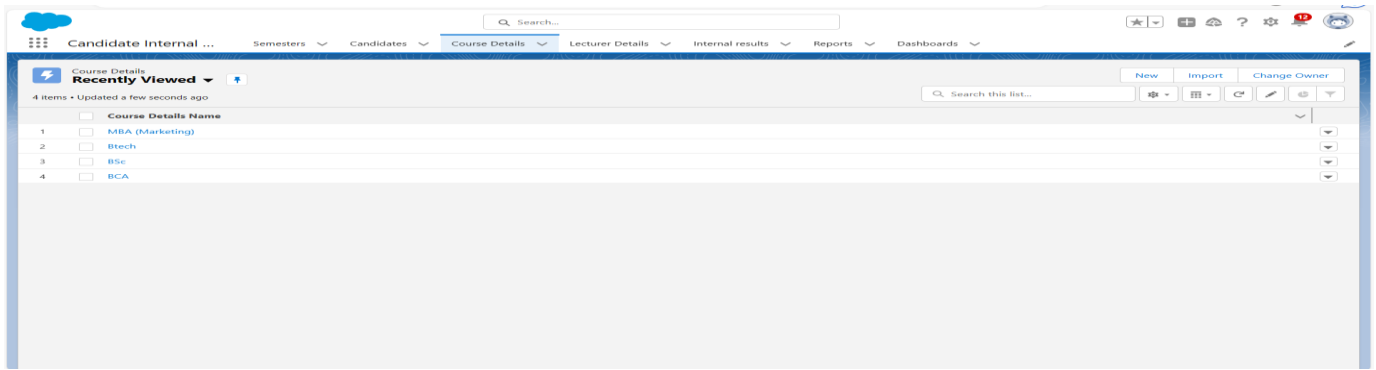
Salesforce user adoption is the simple act of enabling a user to use SFDC's full CRM capabilities by creating strategies around onboarding, training, and continued development – all to drive overall digital adoption.

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.

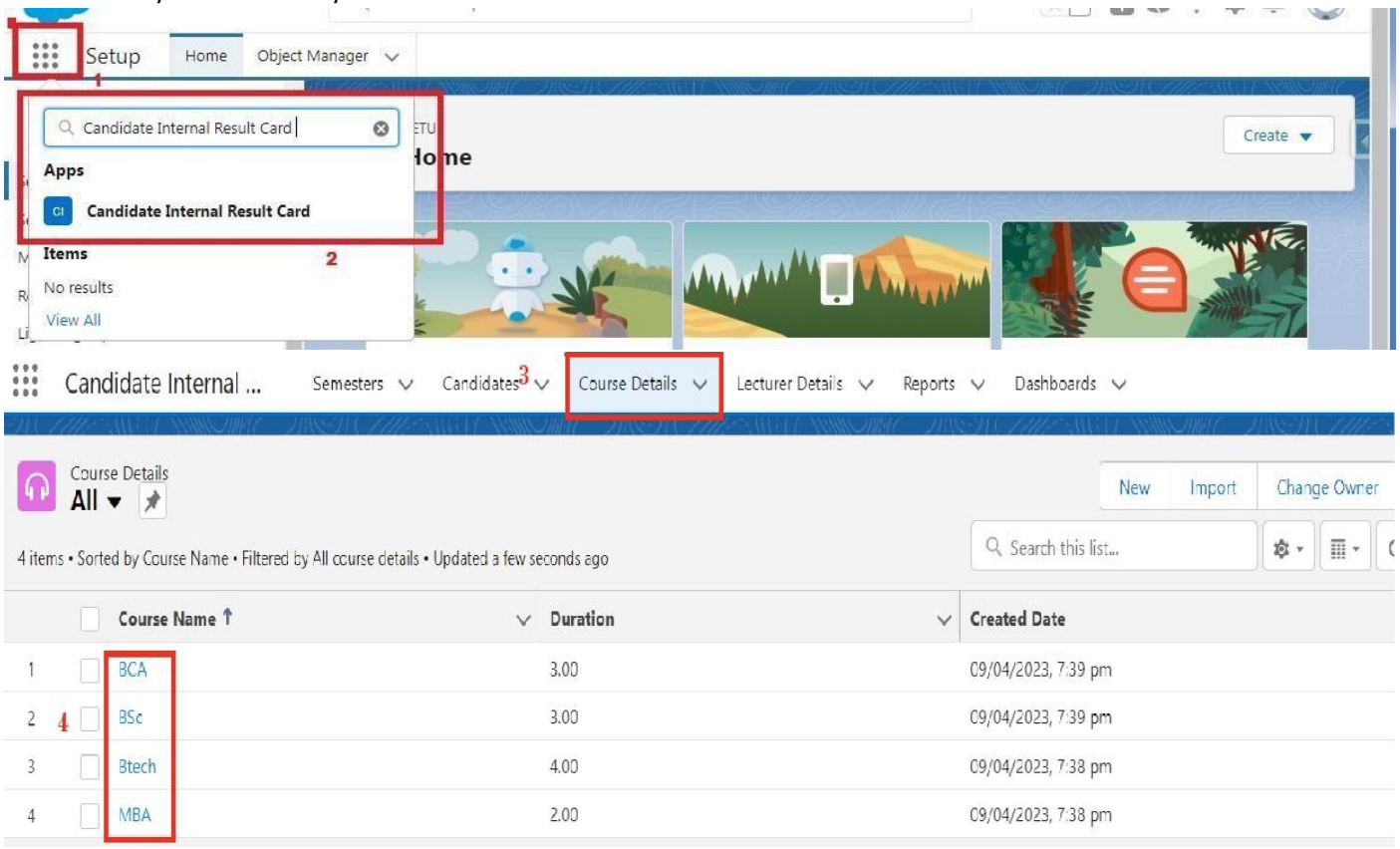


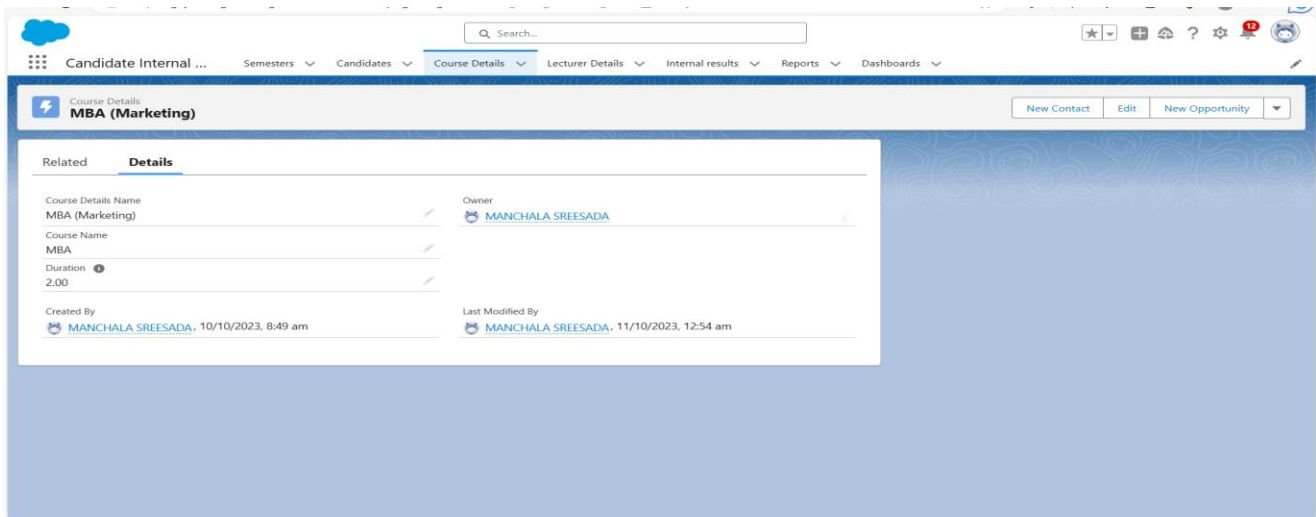


View Record (Course Details)

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

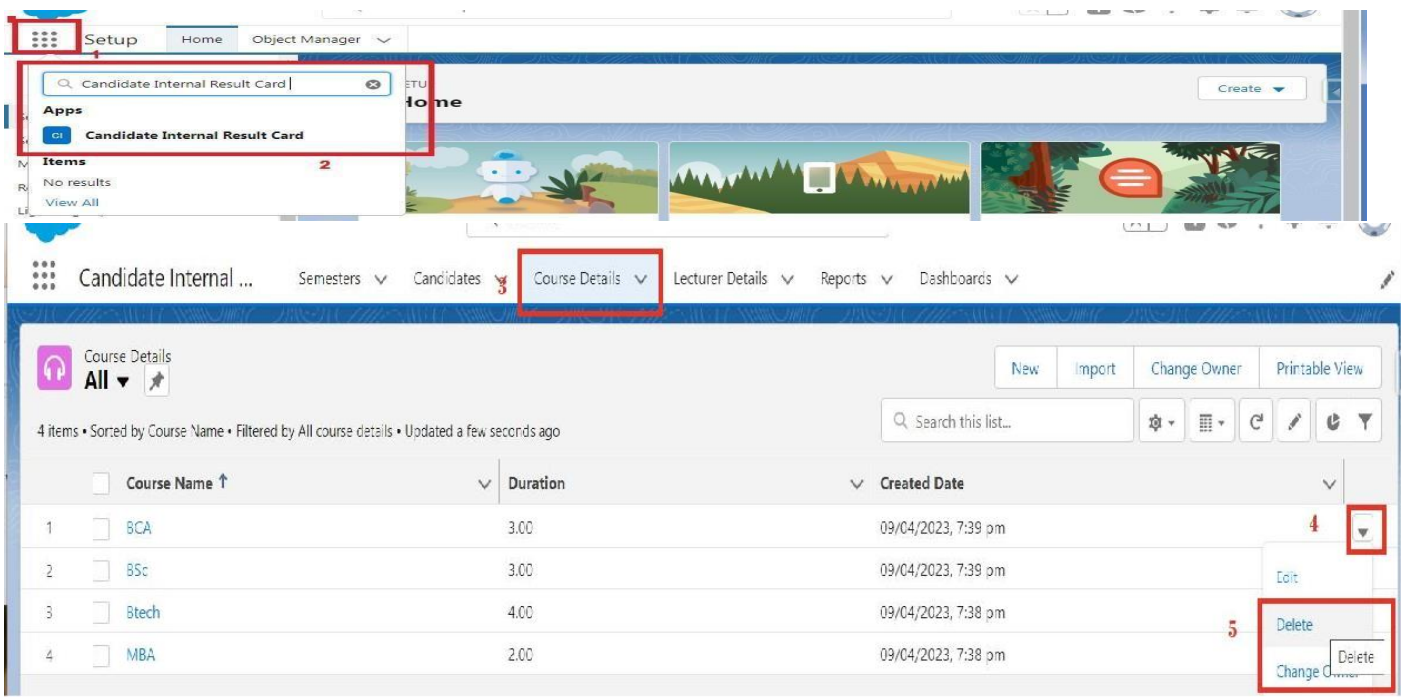


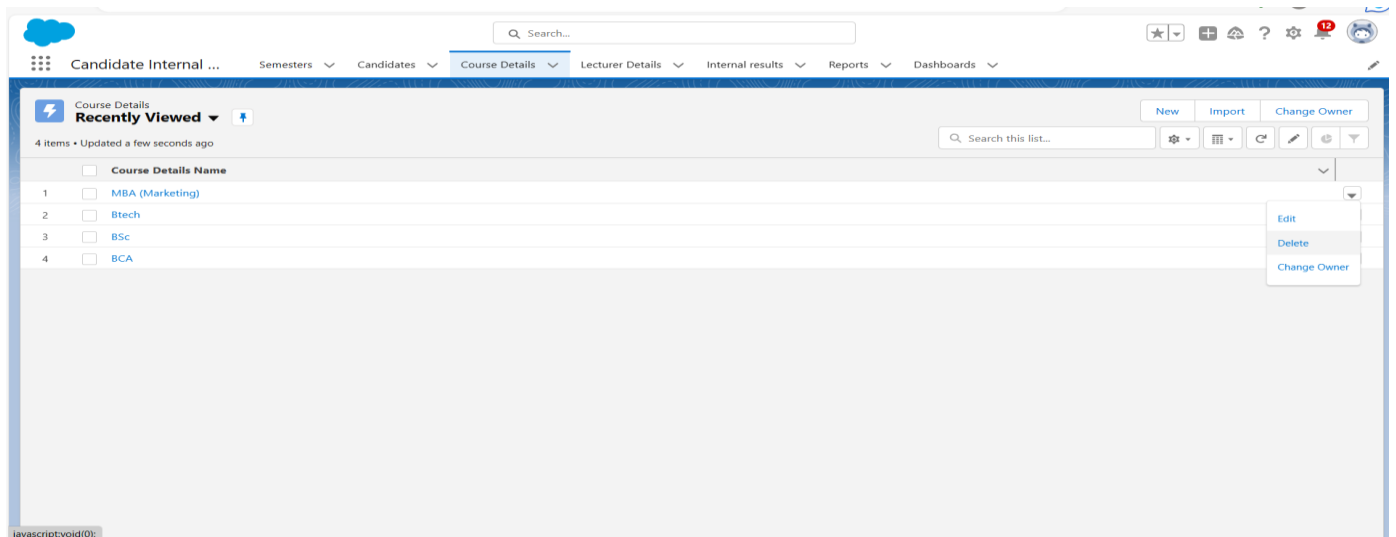


Delete Record (Course Details)

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.





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 is 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

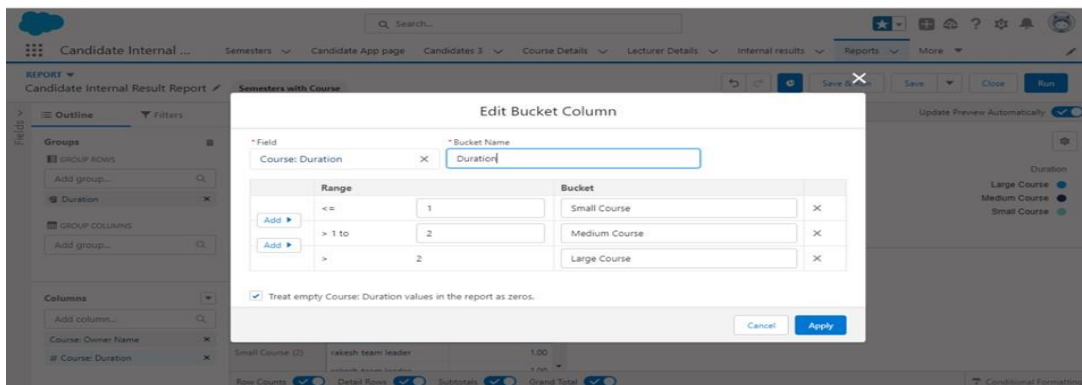
8. Click save and run

9. Give report name – Candidate Internal Result Report 10. Click Save

The first screenshot shows the 'Setup' menu in the top left corner, with a red box highlighting the 'Candidate Internal Result Card' app. The second screenshot shows the 'Reports' tab in the top navigation bar, with a red box highlighting the 'New Report' button. The third screenshot shows the 'Candidate Internal Result Report' builder interface, with red boxes highlighting the 'Save & Run' button, the 'Refresh' button, and the 'Fields' pane on the left side.

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 ⁹
Candidate Internal Result Report

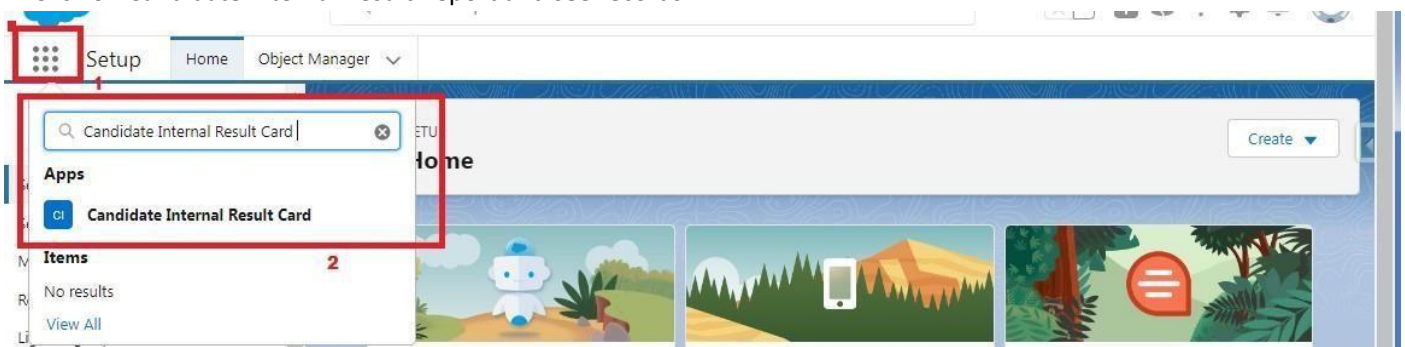
Report Unique Name ¹
Candidate_Internal_Result_Report_bkY


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.





Search...

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Candidate Internal ...Semesters ▾Candidates ▾Course Details ▾Lecturer Details ▾

Reports ▾

Dashboards ▾

Reports

Recent

9 items

Q Search recent reports...

New Report

New Folder

⚙️

REPORTS	Report Name ▾	Description ▾	Folder ▾	Created By ▾	Created On ▾	Subscribed
Recent	Property's 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						

3

4



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.

Travel Approval Departments Employee Details Expenses Expense Items Reports **1 Dashboards** Travel Approvals

Dashboards

Recent

3 items

Search recent dashboards...

2 New Dashboard New Folder

New Dashboard

*** Name**

Candidate Internal Result Card |

Description

Folder

Private Dashboards

Select Folder

Cancel **4 Create**

Employee Travel detail

5 + Component + Filter

Add Component

Report

Candidate Internal Result Report

☐ Use chart settings from report

Display As

X-Axis

Course: Course Name

Preview

Candidate Internal Result Report

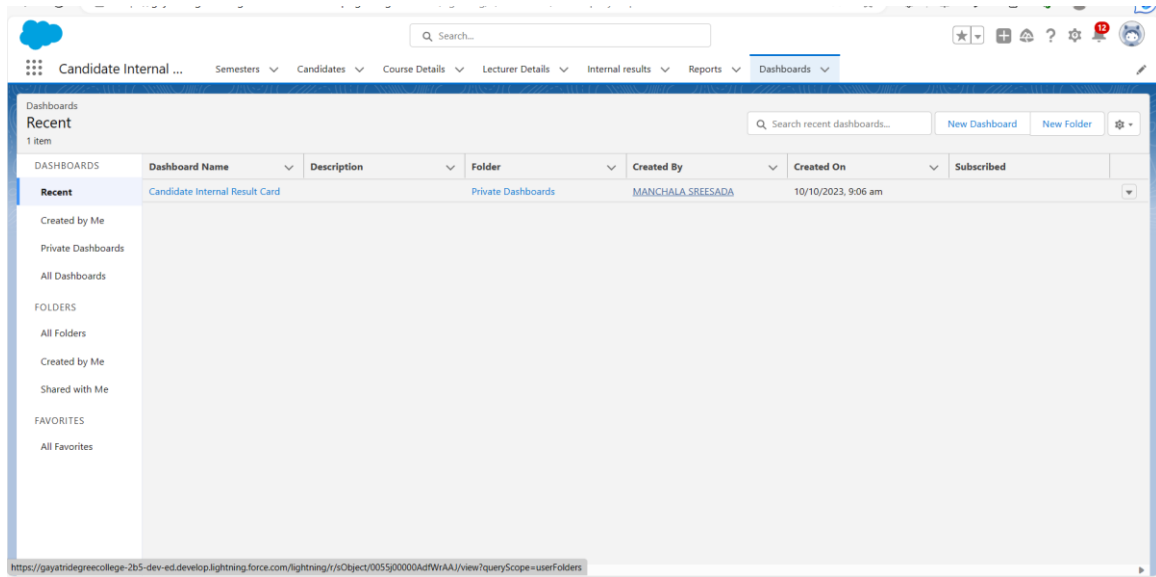
Record Count

BCA BSc Btech MBA

Course: Course Name

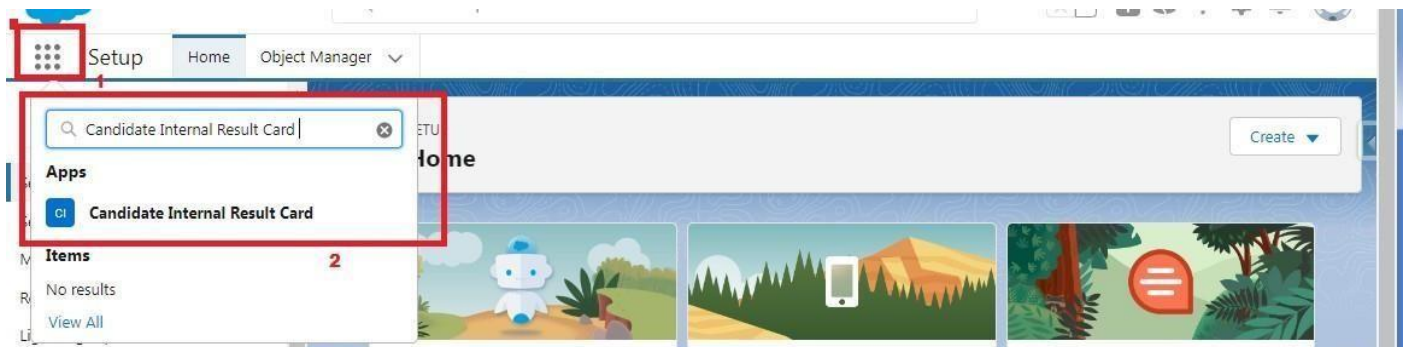
View Report (Candidate Internal Result Report)

Cancel **8 Add**



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



Candidate Internal ... Semesters ▾ Candidates ▾ Course Details ▾ Lecturer Details ▾ Reports ▾ **Dashboards ▾** 3

Dashboards


Recent

8 items

Q Search recent dashboards...

New Dashboard New Folder ⚙ ▾

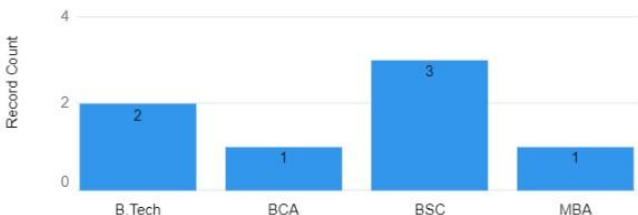
DASHBOARDS	Dashboard Name ▾	Description ▾	Folder ▾	Created By ▾	Created On ▾	Subscribed
Recent	Propertyts with Customer Name Report		Private Dashboards		8/4/2023, 12:58 pm	▾
Created by Me	Job application with candidate name		Private Dashboards	-	8/4/2023, 7:14 pm	▾
Private Dashboards	Events with Attendees		Private Dashboards		6/4/2023, 5:23 pm	▾
All Dashboards	Candidate Internal Result Card 4		Private Dashboards		9/4/2023, 8:00 pm	▾
FOLDERS	Travel Approval		Private Dashboards		1/4/2023, 12:58 pm	▾
All Folders	Employee Travel detail		Private Dashboards		8/4/2023, 12:22 pm	▾

 Q Search...

Candidate Internal ... Semesters ▾ Candidates ▾ Course Details ▾ Lecturer Details ▾ Internal resultss ▾ Reports ▾ **Dashboards ▾**

Candidate Internal Result Card

Candidate Internal Result Report



View Report (Candidate Internal Result Report)

THEEND

