

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/Signup

Click on sign up.

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

1. First name & Last name – REDDY BHAVANA V R
2. Email –reddybhavanavr@gmail.com
3. Role: Administrator
4. Company: GAYATRI DEGREE COLLEGE - TIRUPATI
5. County: India
6. Postal Code: 517501

bring your ideas to life

- 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
- Customize UI with clicks or any leading-edge web framework

First Name* REDDY BHAVANA Last Name* V R

Email* reddybhavanavr@gmail.com

Role* Administrator

Company* GAYATRI DEGREE COLLEGE-TIRUPATI

Country/Region* India

Postal Code* 517501

Username* reddybhavanavr@gdcproject.com

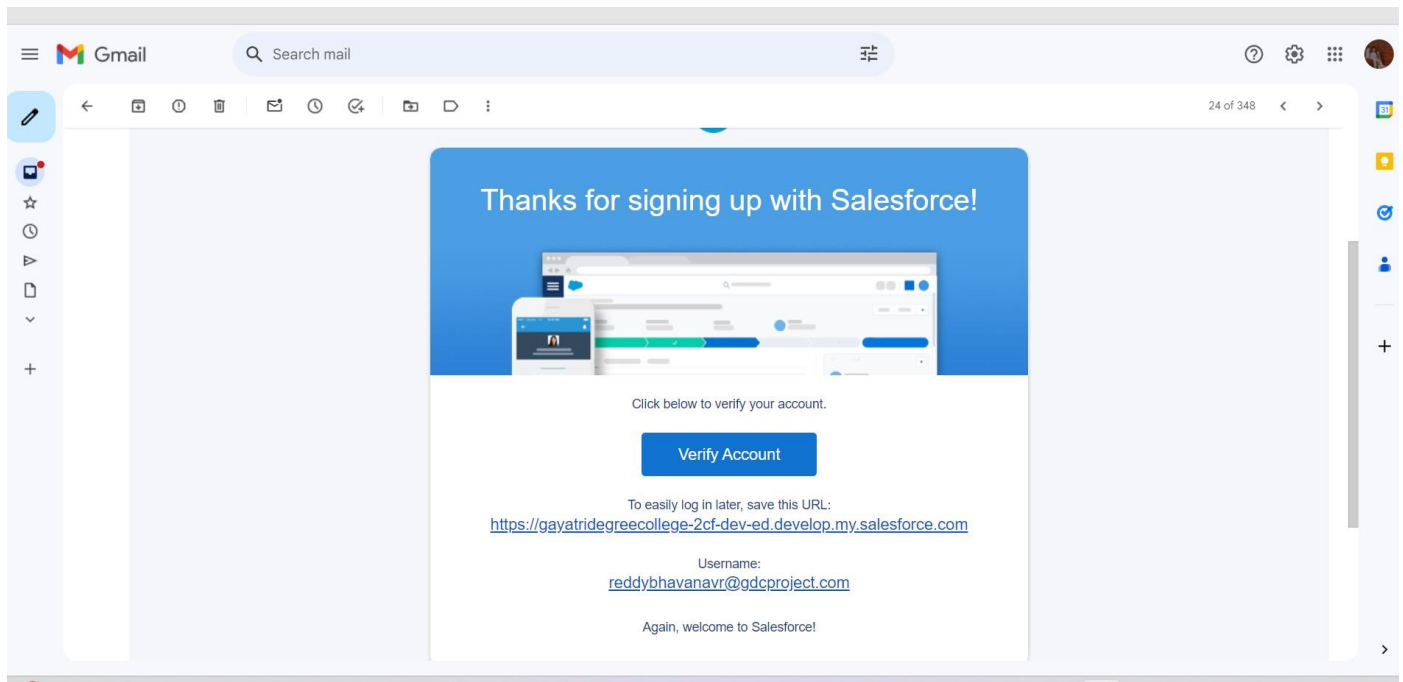
*Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)

☒ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement.

7. Username: reddybhavanavr@gdcproject.com
- 8.

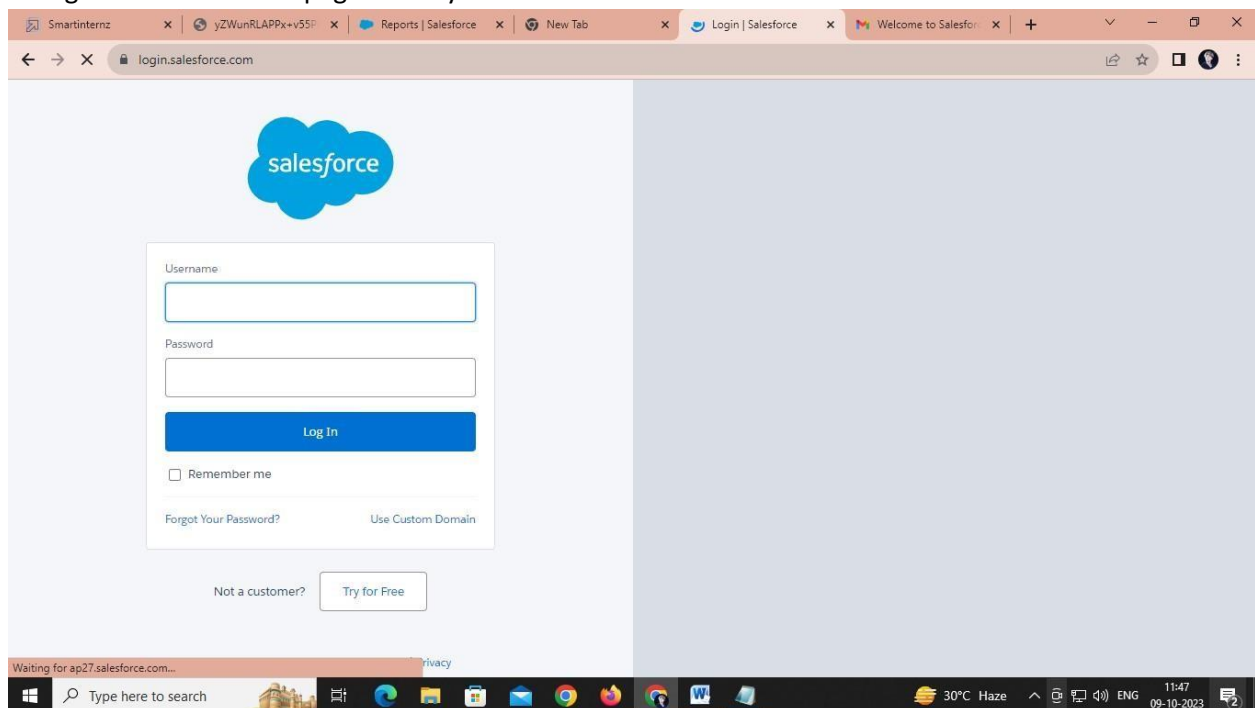
Account Activation

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.

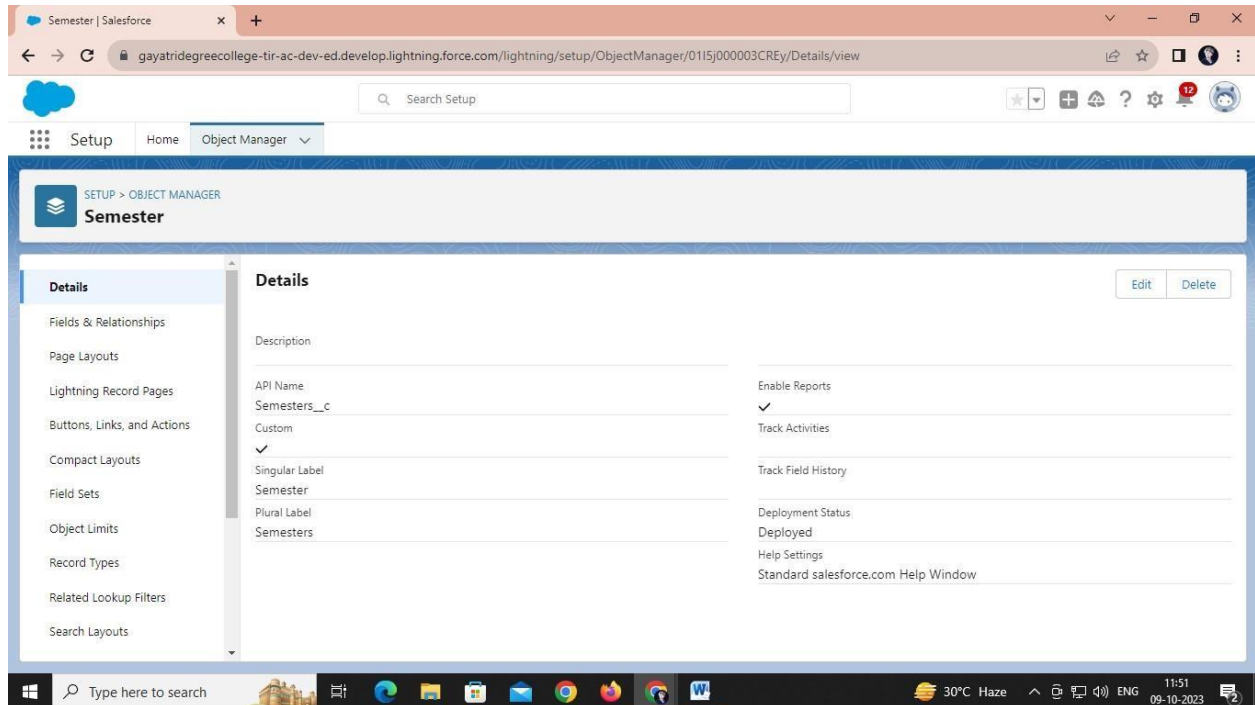


Milestone – 02: Creation of Objects

Object – Semester

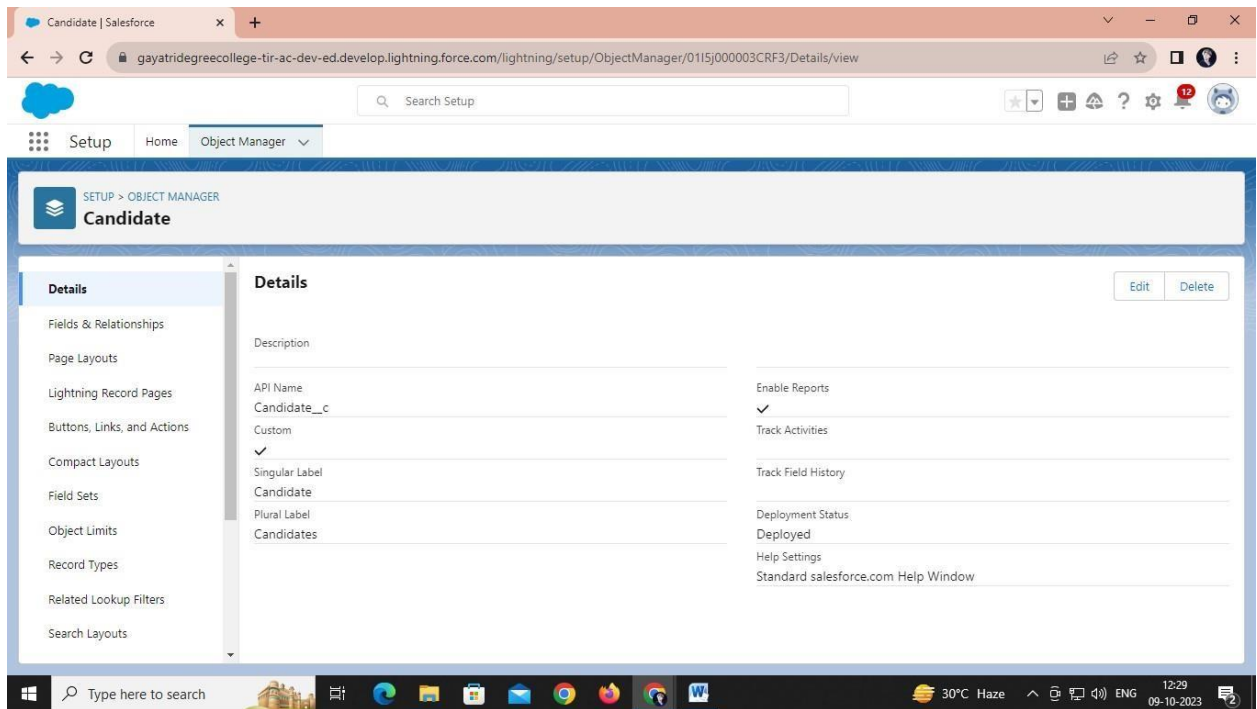
1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Drop down click on that and select Custom Object.
4. On the Custom Object Definition page, create the object 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.



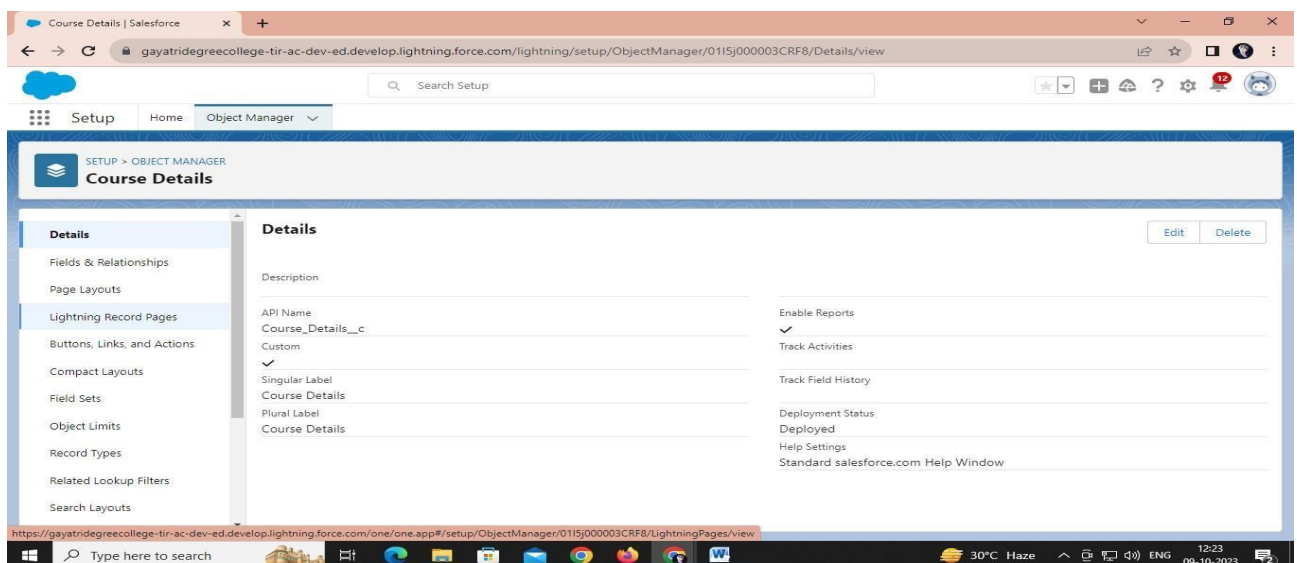
Object – Candidate

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



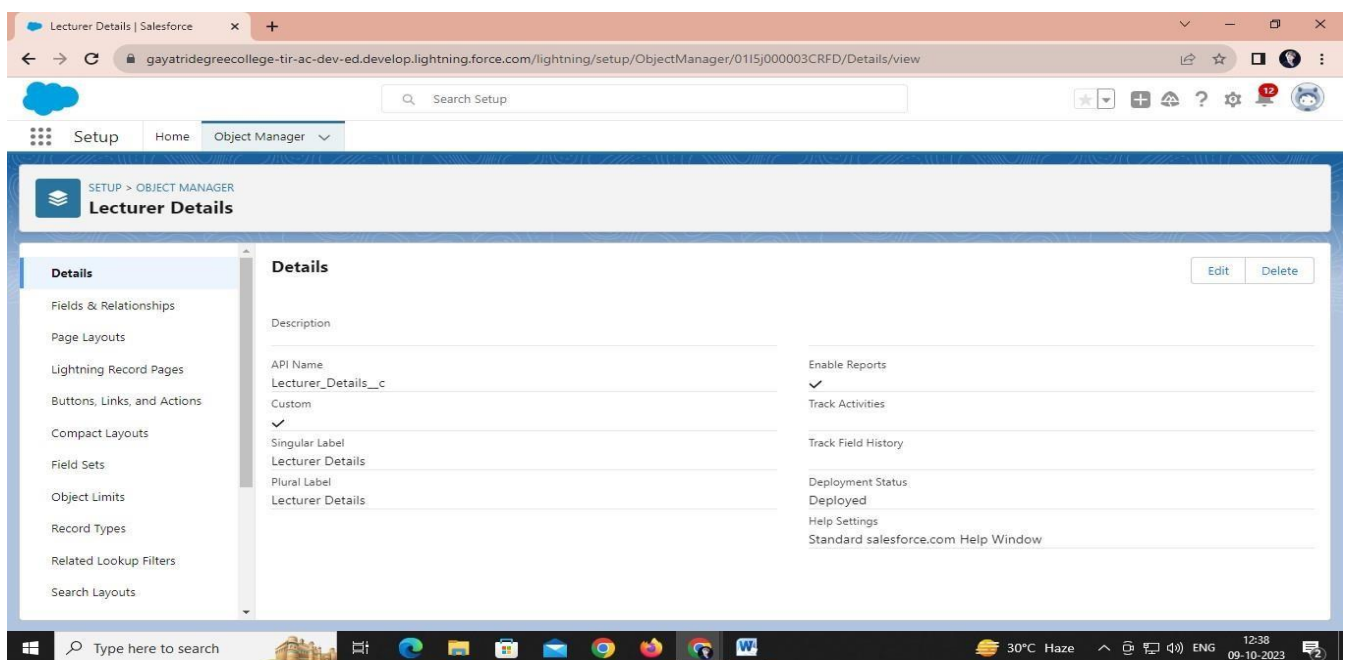
Object – Course Details

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.

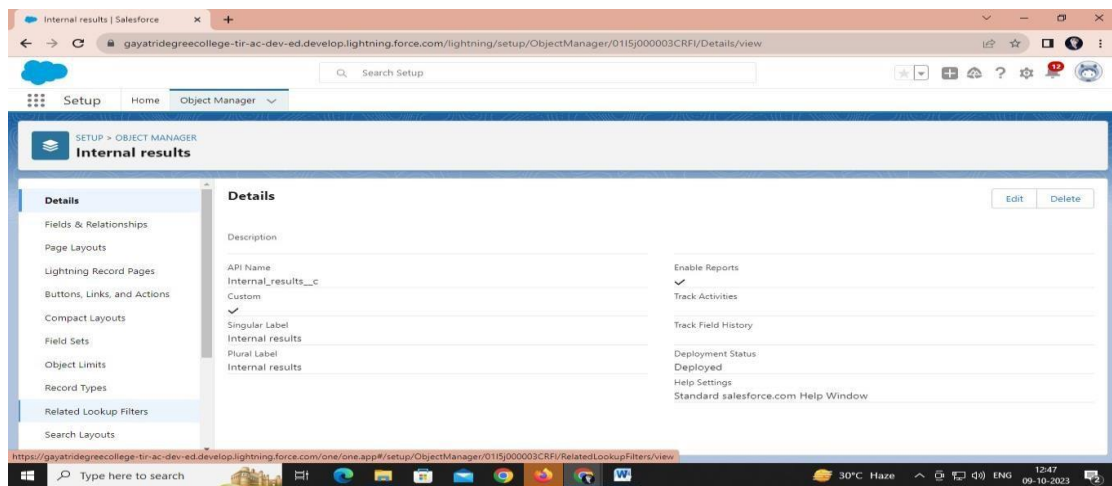


Object – Lecturer Details

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:

- Standard Object Tabs: Standard object tabs display data related to standard objects
- Custom Object Tabs: Custom object tabs displays data related to custom objects.
- Web Tabs: Web Tabs display any external Web-based application or Web page in a Salesforce tabs.
- 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.

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

SETUP
Tabs

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.

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.

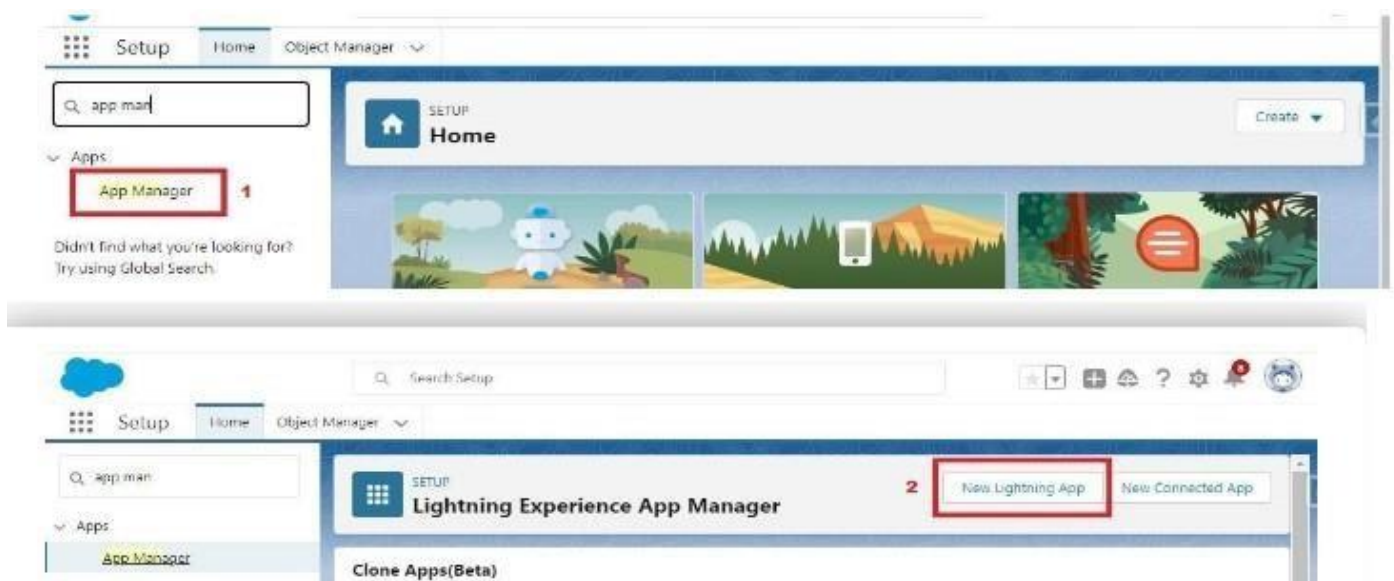
Note: The description, Logo, and Label of standard app cannot be altered.

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** ⓘ

*** Developer Name** ⓘ

Description ⓘ

App Branding

Image ⓘ

[Upload](#)

Primary Color Hex Value ⓘ

Progress bar with 5 steps, step 3 is active.

[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 ⓘ [Create](#) ▼

Dashboards

Selected Items

Semesters

Candidates

Course Details

Lecturer Details

Reports

[Back](#)

Progress bar with 5 steps, step 4 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

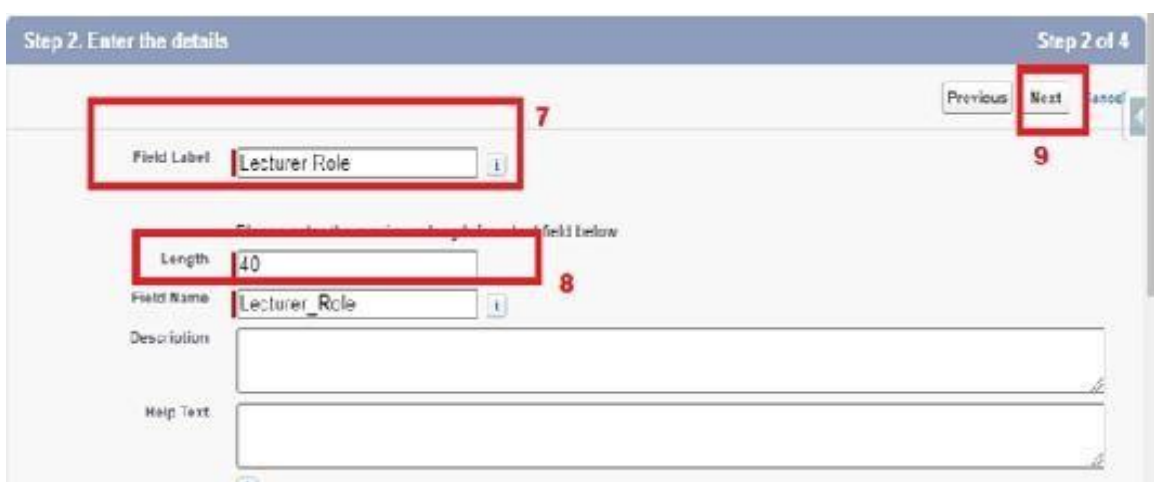
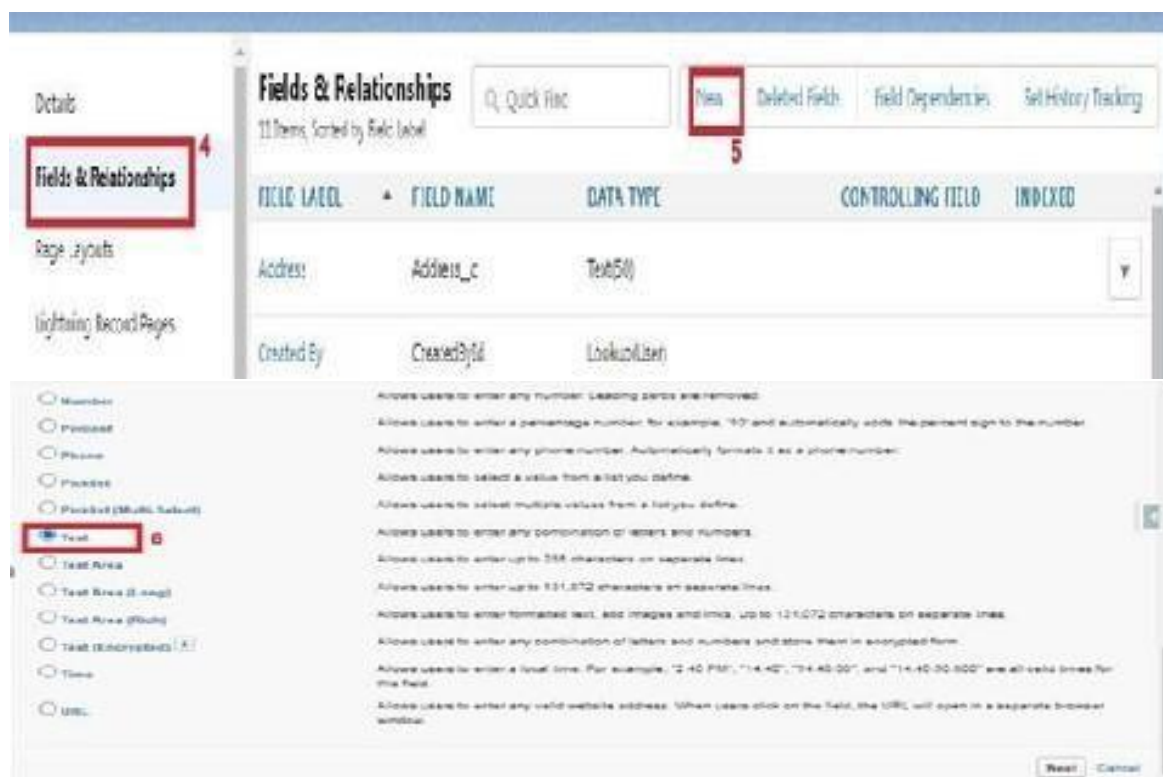
Object Name	Field Name	Data type
-------------	------------	-----------

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



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.

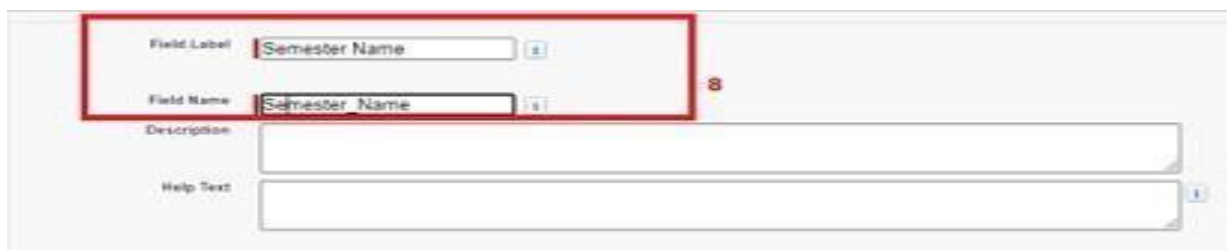
Setup > OBJECT MANAGER
Object Manager

1 Demo, Sorted by Label

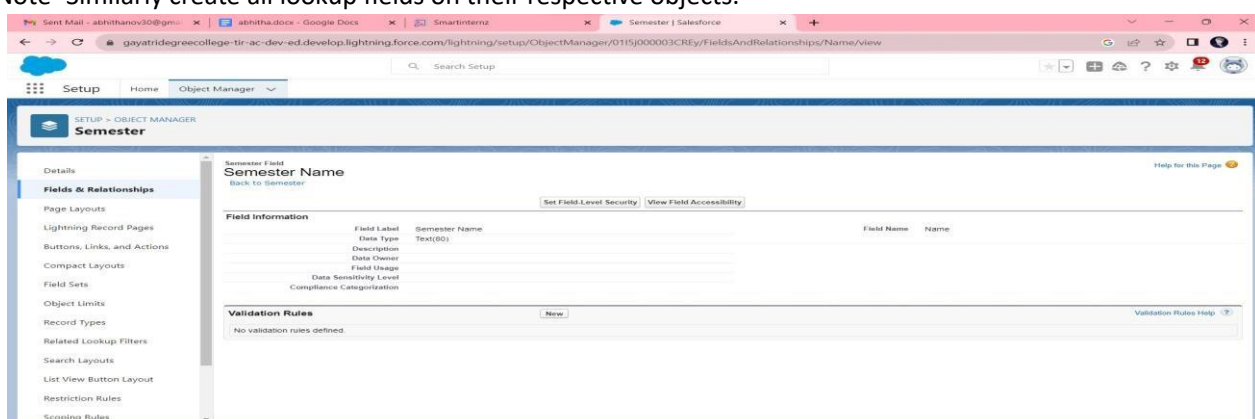
Search Setup

Schema Builder Create

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



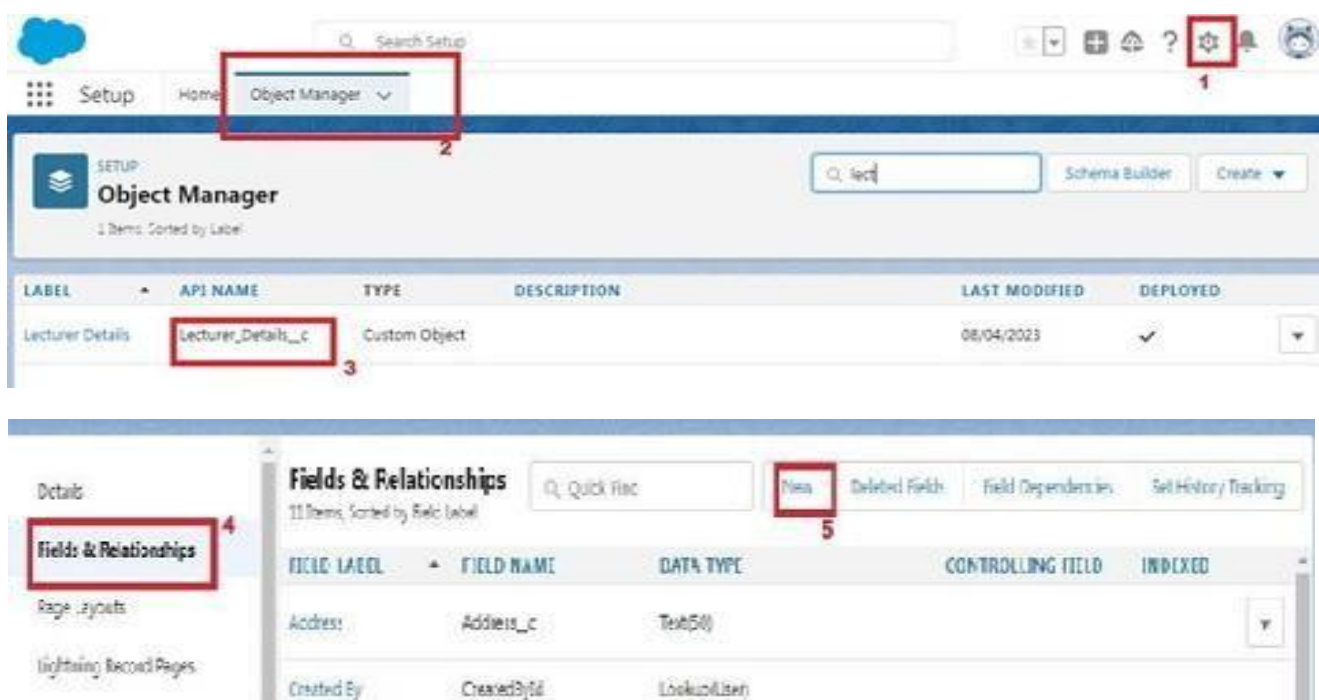
Note- Similarly create all lookup fields on their respective objects.



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.



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.



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** 8

Auto add to custom report type ☒ Add this field to existing custom report types that contain this entity 9

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__c }`

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

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

☐ Number Calculate a numeric value.
Example: `{ (Formatted * 1.57 * Status__c + 22) }`

☐ 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 & " " & FirstName }`

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

Simple Formula ☒ Advanced Formula ☐

Insert Field 9

Candidate Roll Number (Text) =

Functions

-- All Function Categories --

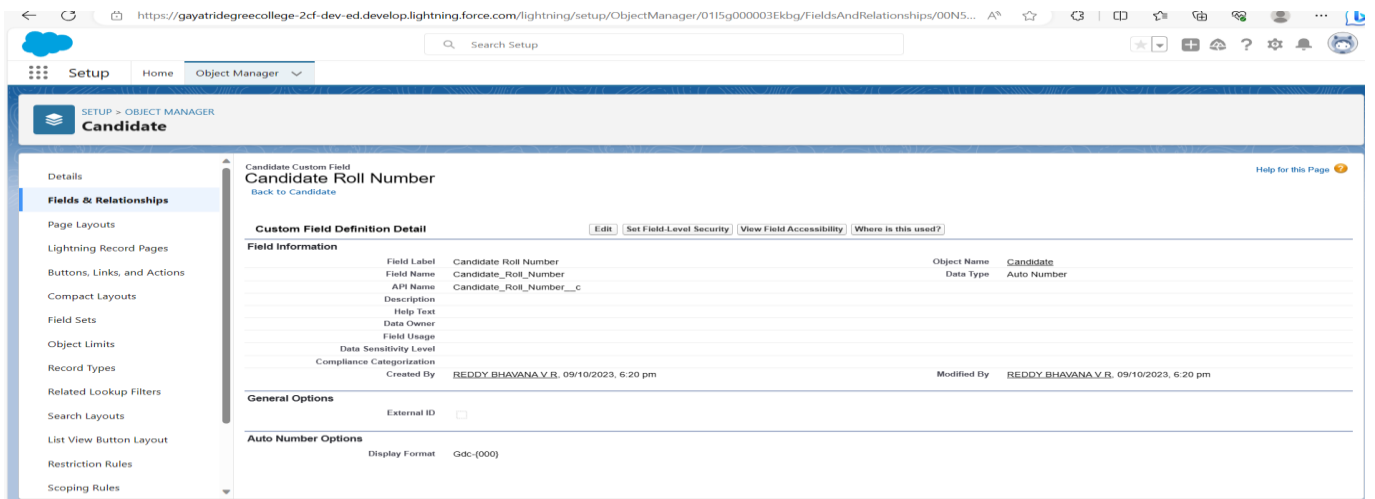
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

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 Candidate Roll Number City Created By > Created By ID Created Date Education Email
--	---	--

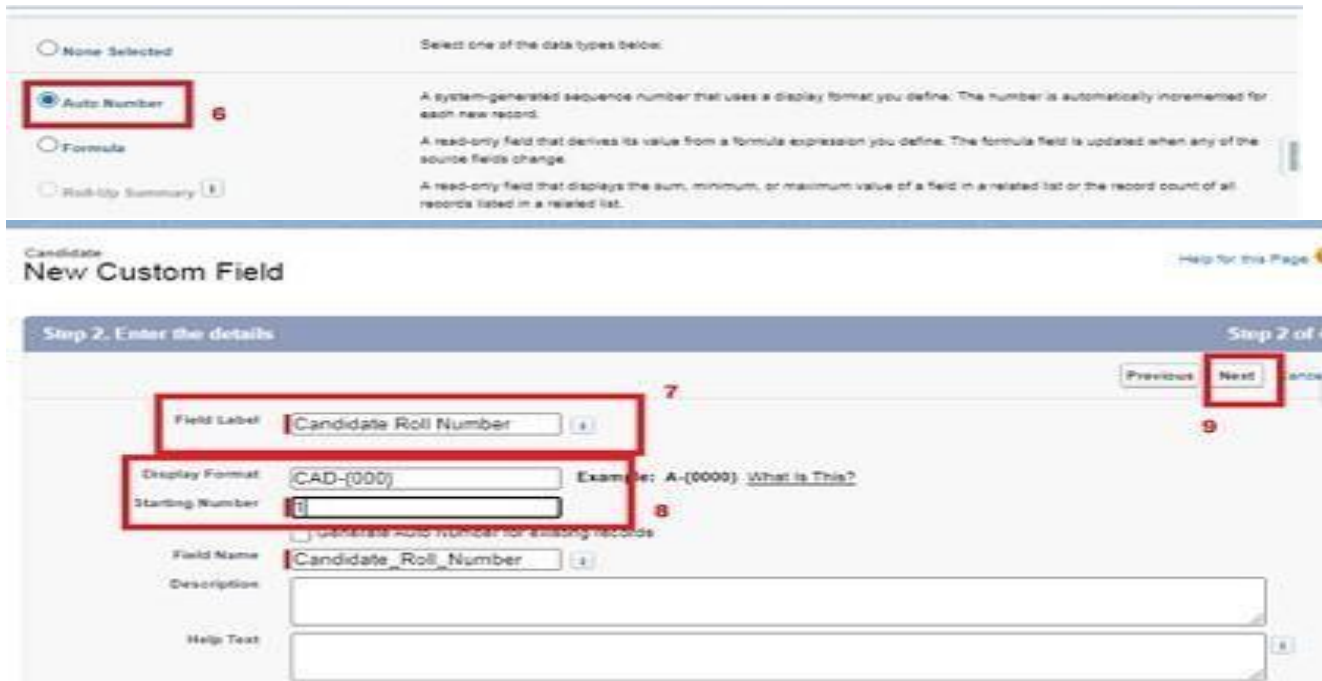
You have selected:
Candidate__r.Candidate_Roll_Number__c
Type: Auto Number
API Name: Candidate__r.Candidate_Roll_Number__c



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.





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 View

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

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	1. User	u1	utkarsh2@vanshiv.com	Operator 1	<input checked="" type="checkbox"/>	operator
<input type="checkbox"/> Edit	2. User	u2	utkarsh2@vanshiv.com	Operator 2	<input checked="" type="checkbox"/>	operator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00g2w00000rs8akeaj.mujcoikjfx1@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Technologies Vanshiv	VTech	vehicledemo@vanshiv.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Teddy John	j.ted	utkarsh1@vanshiv.com	Vehicle Manager	<input checked="" type="checkbox"/>	Vehicle Manager

User Edit Save Save & New Cancel

General Information

First Name: Class
 Last Name: Teacher
 Alias: cteach
 Email: +++@++++.com
 Username: +++@++++.com
 Nickname: class
 Title:
 Company:
 Department:

Role: <None Specified>
 User License: Salesforce
 Profile: Standard User
 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 image consists of two screenshots of a web application interface. The top screenshot shows the 'Course Details' page with a search bar at the top. The 'Course Details' tab is highlighted with a red box and labeled '3'. The 'New' button is highlighted with a red box and labeled '4'. The bottom screenshot shows the 'New Course Details' form. The 'Course Name' field is highlighted with a red box and labeled '5', and the 'Duration' field is highlighted with a red box and labeled '6'. The 'Save' button is highlighted with a red box and labeled '6'.

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 shows the 'Candidate Internal Result Card' app interface. At the top, the 'Setup' tab is selected. A search bar contains the text 'Candidate Internal Result Card'. Below the search bar, the 'Apps' section shows 'Candidate Internal Result Card' as the selected app. The 'Items' section shows 'No results' and a 'View All' link. The 'Course Details' tab is selected in the top navigation bar. Below the tab, the 'Course Details' section shows a list of 4 items. The list is sorted by 'Course Name' and filtered by 'All course details'. The list contains the following items:

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

The 'MBA' record is highlighted with a red box. Below the list, the 'Course Details' section for 'MBA (Finance)' is shown. It includes fields for 'Course Details Name', 'Duration', 'Course Name', 'Created By', 'Owner', and 'Last Modified By'. The 'Owner' field is set to 'REDDY BHAVANA V R'.

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.

The top screenshot shows the Salesforce interface with the 'Candidate Internal Result Card' app. The 'Course Details' tab is selected, displaying a table of course details. The table has columns for Course Name, Duration, and Created Date. The bottom screenshot shows the 'Recently Viewed' view of the same data, with a context menu open for the first row showing options like Edit, Delete, and Change Owner.

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

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

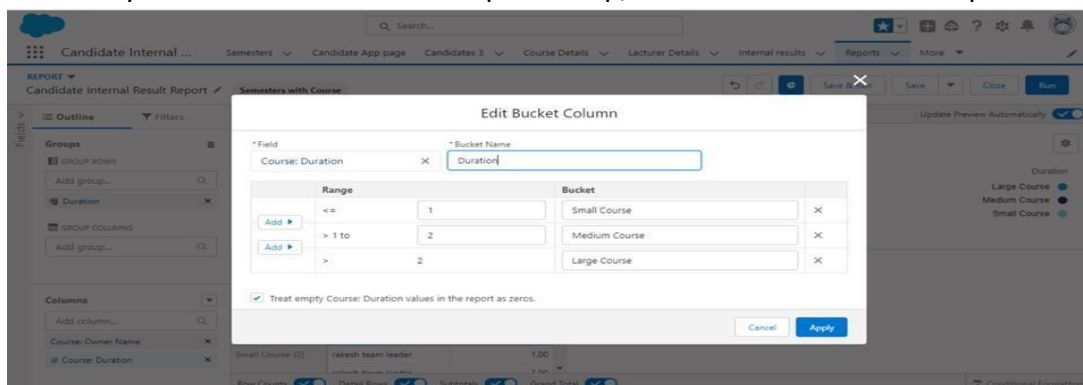
The screenshot displays the Canvas LMS interface with several red boxes and numbers indicating the steps to create a report:

- 1**: App Launcher icon (top left).
- 2**: Candidate Internal Result Card app (search results).
- 3**: Reports tab (top navigation bar).
- 4**: New Report button (Reports section).
- 5**: Semesters with Course report type (Reports section).
- 6**: Group Rows configuration (Course: Course Name).
- 7**: Refresh button (Report preview area).
- 8**: Save & Run button (Report preview area).
- 9**: Report name field (Candidate Internal Result Report).
- 10**: Save button (Report preview area).

The report preview shows a table with columns for Course Name and Semester Name, and rows for Course Name and Semester Name.

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

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

Report Unique Name
Candidate_Internal_Result_Report_bkY

Report Description

Cancel
Save

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 displays a software interface with a top navigation bar containing 'Setup', 'Home', and 'Object Manager'. A search bar in the top left shows 'Candidate Internal Result Card' with a red box around it and a red '2' next to the search results. Below the search bar, a sidebar lists 'Apps' and 'Items'. The 'Apps' section shows 'Candidate Internal Result Card' with a red box around it. The 'Items' section shows 'No results' and a 'View All' link. The main content area features a search bar and a navigation bar with 'Candidate Internal ...', 'Semesters', 'Candidates', 'Course Details', 'Lecturer Details', 'Reports', and 'Dashboards'. The 'Reports' tab is highlighted with a red box and a red '3'. Below the navigation bar, the 'Reports' section is titled 'Recent' and contains a table of recent reports. The table has columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. The 'Candidate Internal Result Report' is highlighted with a red box and a red '4'.

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						



Report: Semesters with Course

Candidate Internal Result Report

Total Records

7

<input type="checkbox"/> Course: Course Name ↑ ▾	Semester: Semester Name ▾	Course: Course Details Name ▾	Duration ▾
<input type="checkbox"/> B.Tech (2)	Semester 03	B.Tech (Mechanical)	Large Course
	Semester 02	B.Tech (Automobile)	Large Course
Subtotal			
<input type="checkbox"/> BCA (1)	Semester 06	BCA (Data Science)	Small Course
Subtotal			
<input type="checkbox"/> 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			
<input type="checkbox"/> MBA (1)	Semester 01	MBA (Finance)	Large Course
Subtotal			
Total (7)			

Milestone – 06: dashboards

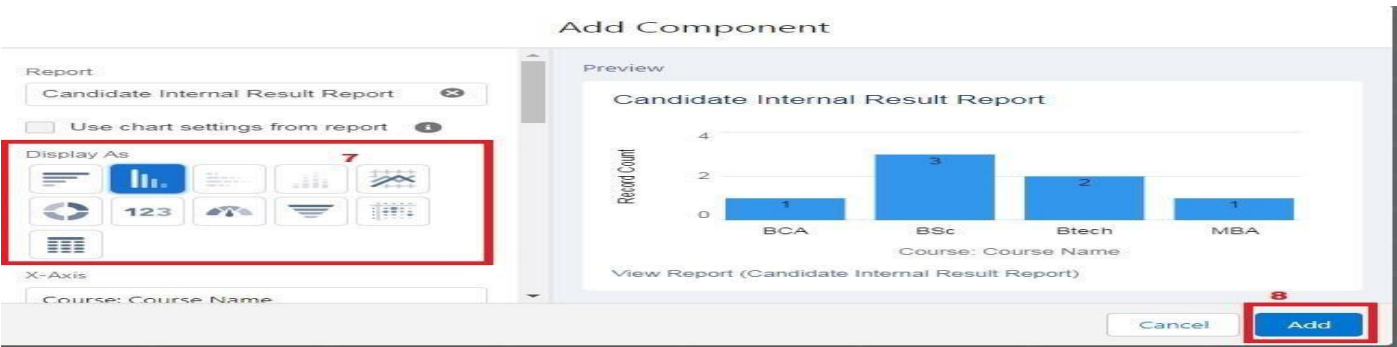
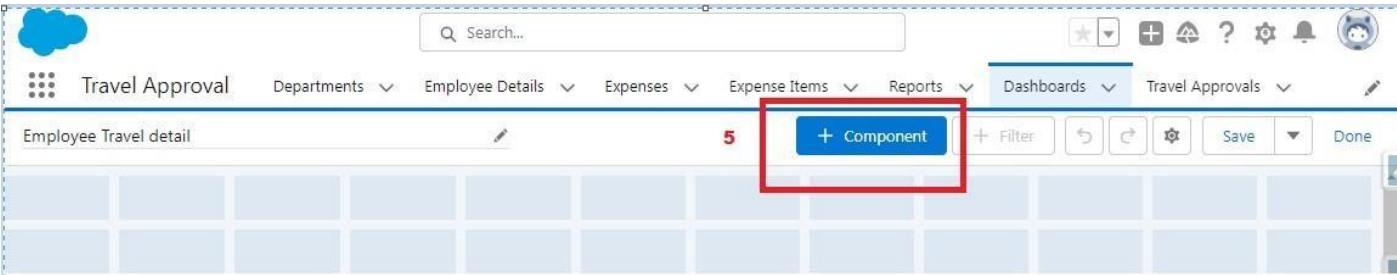
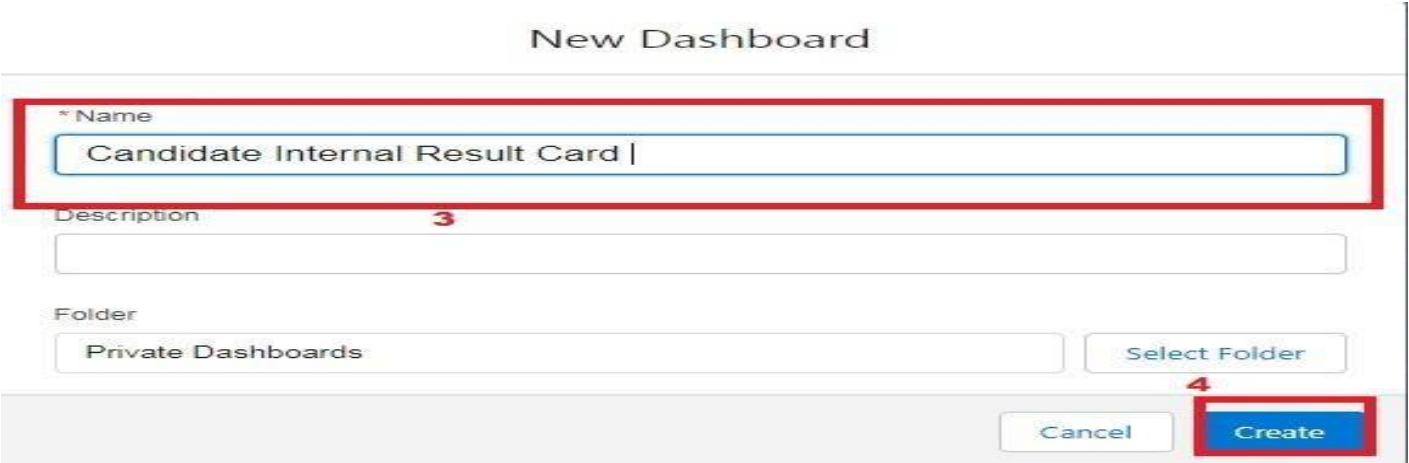
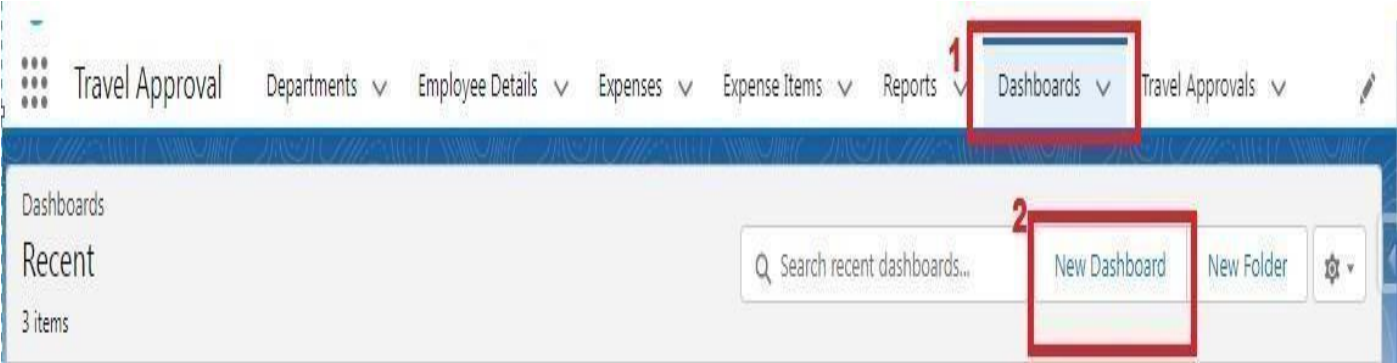
Dashboards

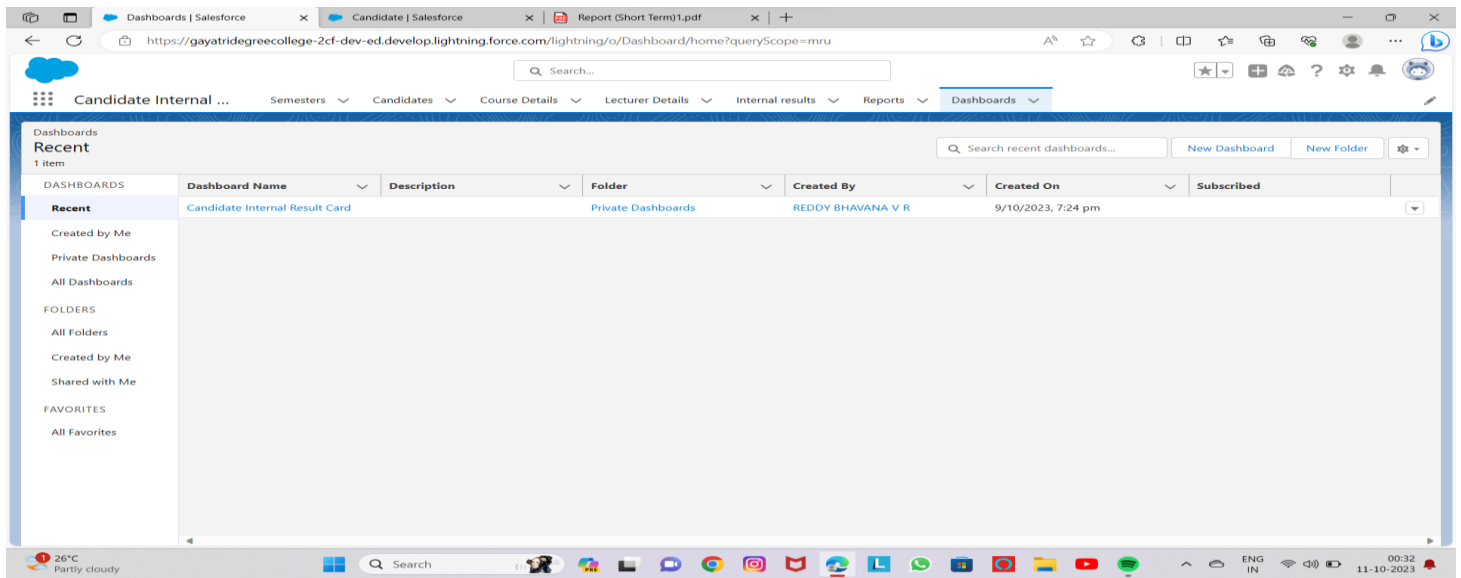
Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then they are able to view your dashboard's data-supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

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.

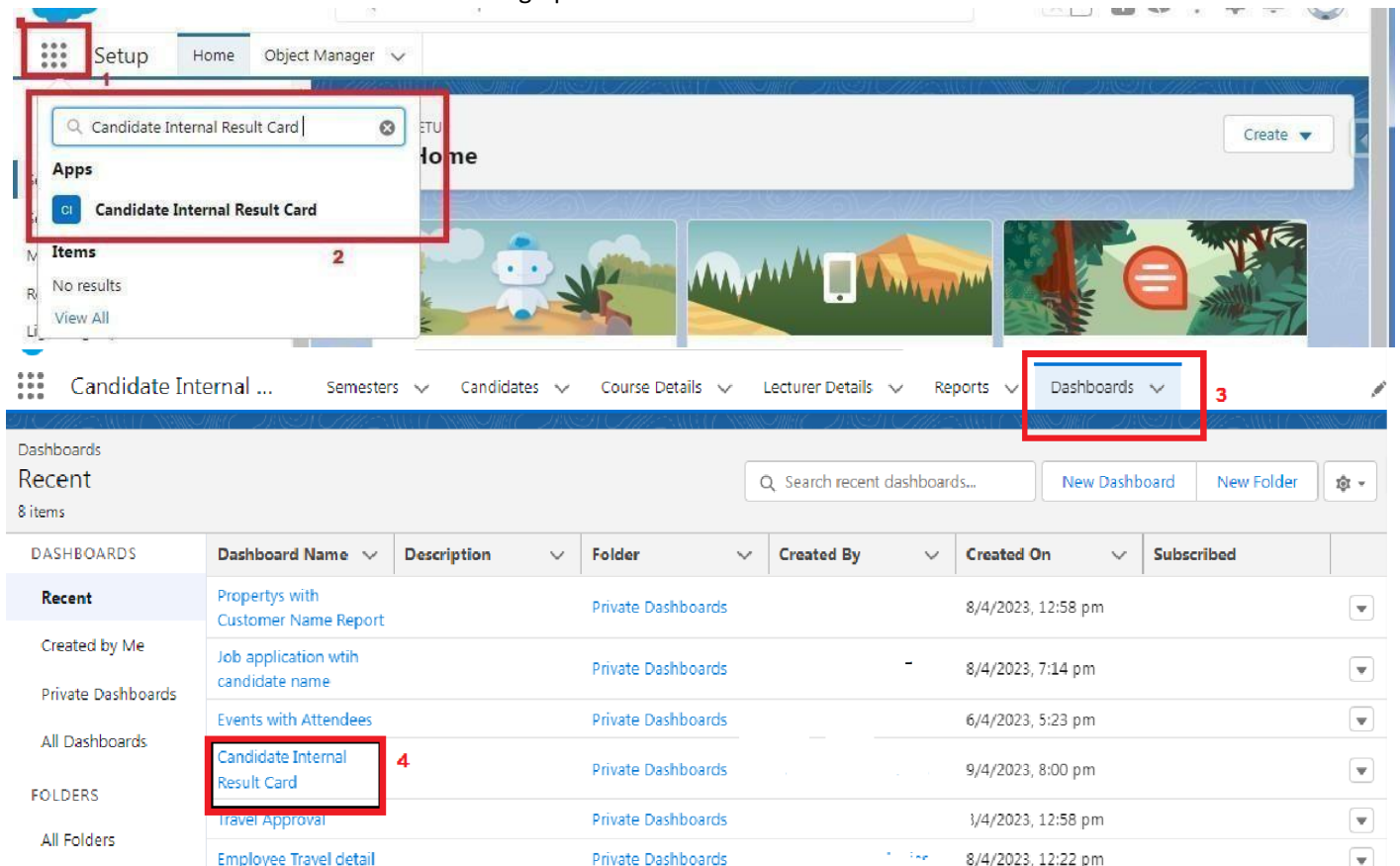
9. Click save.





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





THEEND

