



Getting Started with SalesForce CRM

Getting Started with SALESFORCE Part XII

Description:

BISP is committed to provide BEST learning material to the beginners and advance learners. In the same series, we have prepared a complete end-to end Hands-on Beginner's Guide for SalesForce. The document focuses on How Approval process works, Alert mechanism, SalesForce Reports and Dashboards. **Join our professional training program and learn from experts.**

History:

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Approval Processes:-

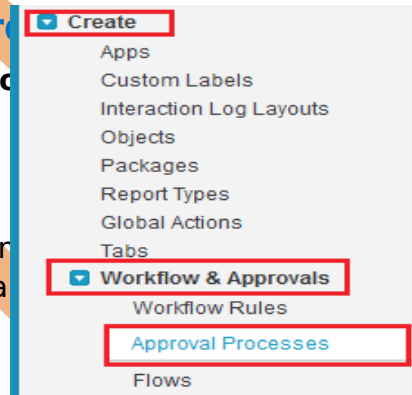
Another business logic engine of Salesforce to automate approval process. Approvals take automation one step further, allowing you to specify a sequence of steps that are required to approve a record. An approval process is an automated process your organization can use to approve records in Salesforce. An approval process specifies the steps necessary for a record to be approved and who must approve it at each step. A step can apply to all records included in the process, or just records that meet certain administrator-defined criteria. An approval process also specifies the actions to take when a record is approved, rejected, recalled, or first submitted for approval.

How to Launch the Approval Process Wizard

Setup > Create > Workflow & Approvals > Approval Processes

Step 1:-

After Click on Approval process link then Choose the object for the new approval process. Click Create New Approval Process there is two option Use Jump Start Wizard and Use Standard Wizard You can choose Use Standard Wizard from the drop-down button.



Approval Processes
Job Application

Help for this Page ?

Approvals are complex business processes that require information gathering and planning before implementing. It is recommended that you follow the instructions below before getting started.

1. [Read the help topic](#)
2. [View the checklist](#)
3. [Create a custom user hierarchical relationship field](#)
4. [Create email templates](#)
5. Create an approval process using either the Jump Start or Standard Wizard
6. Add Approval History Related List to all page layouts
7. Activate the process to deploy to your users

Manage Approval Processes For: Job Application

A listing of both active and inactive approval processes for Job Applications is displayed below. To create a new approval process, click Create New Approval Process then select Use Jump Start Wizard to set up your approval process in a few short steps. Or, select Use Standard Wizard to configure all approval options.

Create New Approval Process

- Use Jump Start Wizard
- Use Standard Setup Wizard

Click on Jump Start Wizard

Reorder

Active Approval Processes

No approval processes available

Inactive Approval Processes

No approval processes available

Deference Between Jump Start Wizard and Standard Approval Process Wizard

Jump Start Wizard	Standard Approval Process Wizard
The jump start wizard is useful for simple approval processes with a single step	Standard Approval Process Wizard supports multiple approval steps or complex approval processes.
Many steps are skipped.	All the steps all included.
Use the jump start wizard if you want to create an approval process quickly by allowing Salesforce to automatically choose some default options for you	Use it when you want to fine tune the steps in your approval process

Step 2:- After click Jump Wizard :

Approval Process Jump Start Wizard
Job Application

[Help for this Page](#)

Approval Process Information ! = Required Information

The Jump Start wizard creates a one-step approval process for you in just a few minutes.

Enter a name for your process in the box below and then select an email template to notify the approver (optional).

Name:

Unique Name: i

Use Approver Field of Job Application Owner:

Approval Assignment Email Template: 🔍

Add the Approval History related list to all Job Application page layouts:

Specify Entry Criteria

Use this approval process if the following formula evaluates to true :

Example: `OwnerId <> LastModifiedById` evaluates to true when the person who last modified the record is not the record owner. [More Examples ...](#)

true write in Formula field

Functions

-- All Function Categories --
ABS
AND
BEGINS
BLANKVALUE
BR
CASE

Select Approver

Using the options below, specify the user to whom the approval request should be assigned.

Let the submitter choose the approver manually.
 Automatically assign an approver using a standard or custom hierarchy field:
 Automatically assign to queue. 🔍
 Automatically assign to approver(s).

📄 Because this is the Jump Start Wizard, salesforce.com automatically chooses some settings for you. [Show More](#)

Approval Process Information :

Enter a name for the new approval process.

Enter a unique name, which will be used to refer to this approval process in the Force.com API.

Enter Approval Assignment Email Template this field not mandatory.

Specify Entry Criteria :

Select on in drop down menu approval process.

Criteria are .

Formula evaluates to true.

Select Approver :

Using the option select any one option (Ex : Automatically assign an approver using standard or custom hierarchy field.

After that click on **Save** button.

Step 3:-

1 You have just created a one-step approval process for Job Applications using the Jump Start Wizard. Although not required, it is recommended that you perform additional actions before activating your process to make it more functional.

- 1** Create additional steps if a record requires more than one level of approval.
Example:
 - Discounts of more than 15% require an additional manager's approval
- 2** Add Initial Submission workflow actions. These actions will take place when a record is submitted for approval.
Example:
 - A Field Update action that changes the value of the Status field to "Pending"
- 3** Add Final Approval workflow actions. These actions will take place when a record has received all necessary approvals.
Examples:
 - A Field Update action that changes the value of the Status field to "Approved"
 - An Email Alert action that notifies the owner their record has been approved
- 4** Add Final Rejection workflow actions. These actions will take place when a record has been completely rejected by an approver.
Examples:
 - A Field Update action that changes the value of the Status field to "Rejected"
 - An Email Alert action that notifies the owner their record has been rejected
- 5** Add Recall workflow actions. These actions will take place when a submitted approval request is recalled.
Examples:
 - A Field Update action that changes the value of the Status field from "In Progress" to "Not Submitted"

[View Approval Process Detail Page](#)

Then click on **View Approval Process Detail Page** .

Step 4 :-

Approval Processes

[Help for this Page](#) 

Job Application: Job Applection

[« Back to Approval Process List](#)

5

Process Definition Detail Edit Clone Delete **Activate** View Diagram

Process Name	Job Applection	Active	<input type="checkbox"/>
Unique Name	Job_Applection	Next Automated Approver Determined By	Manager of Record Submitter
Description			
Entry Criteria	true		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template			
Initial Submitters	Job Application Owner		
Created By	yogesh sharma , 10/24/2013 12:18 PM	Modified By	yogesh sharma , 10/24/2013 12:18 PM

Initial Submission Actions i **1** Add Existing Add New

Action	Type	Description
Record Lock		Lock the record from being edited

Approval Steps i **2** New Approval Step

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit Del	1	Step 1			Manager	Final Rejection

Final Approval Actions i **3** Add Existing Add New

Action	Type	Description
Edit Record Lock		Lock the record from being edited

Final Rejection Actions i **4** Add Existing Add New

Action	Type	Description
Edit Record Lock		Unlock the record for editing

Recall Actions i Add Existing Add New

Action	Type	Description
Record Lock		Unlock the record for editing

1. Initial Submission Actions : click on Add new button open in dropdown four option Task, Email Alert, field Update, Outbound Message. select any one option. (Ex : Field Update).

Status on hold

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.

Field Update Edit
Save Save & New Cancel

Identification
! = Required Information

Name

Unique Name i

Description

Object Job Application

Field to Update

Field Data Type Picklist

Re-evaluate Workflow Rules after Field Change i

Specify New Field Value

Picklist Options

The value above the current one

The value below the current one

A specific value

Save Save & New Cancel

Fill All Mandatory field's in Identification and select Specify New Value select in picklist option . Then click on **Save** button.

2. Approval Steps :

Approval Steps i
New Approval Step

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit Del	1	Step 1			<u>Manager</u>	Final Rejection

You can give approval setting by using Approval Steps, there is who can approve. and all so add multiple Approval candidate by click New Approval Step. (Ex: I will Assign Approver authority give on Manager.)

3. Final Approval Actions :

Action	Type	Description
Edit	Record Lock	Lock the record

Final Approval Actions There is two button **Add Existing**, and **Add New** button click on **Add New** button, click on **Field Update** in dropdown list.

Field Update Edit Save Save & New Cancel

Identification = Required Information

Name Accepted Status
 Unique Name Accepted_status
 Description
 Object Job Application
 Field to Update Status
 Field Data Type Picklist
 Re-evaluate Workflow Rules after Field Change

Specify New Field Value

Picklist Options

The value above the current one
 The value below the current one
 A specific value Accepted

Save Save & New Cancel

Fill All Mandatory field's in Identification and select Specify New Value select in picklist option . Then click on **Save** button.

4. Final Rejection Actions :

All kind of step last step.

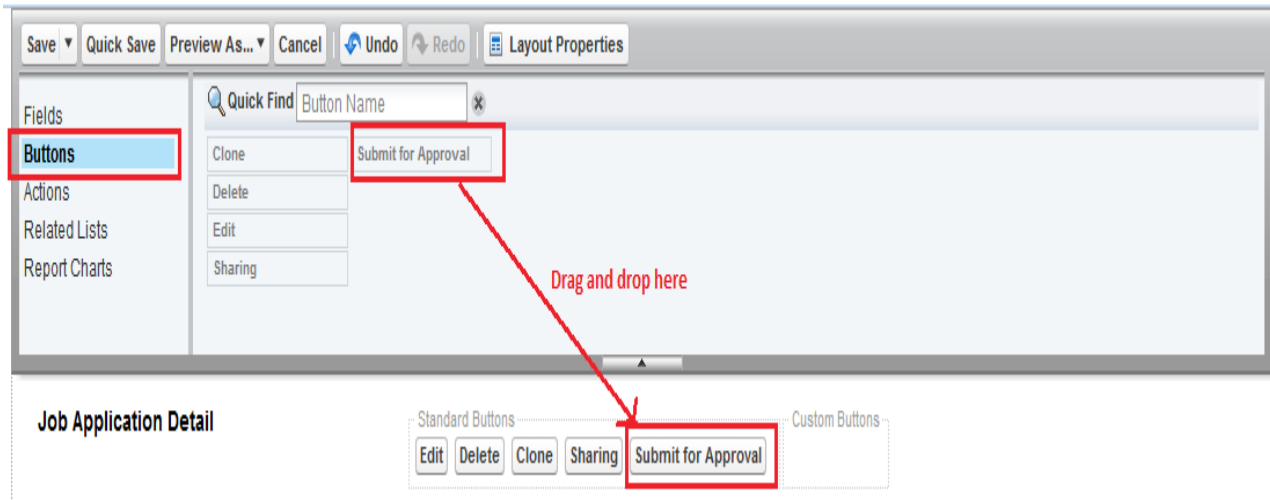
5. Click on Active Button :

finish all steps then click on Active button for active this Approval Process.

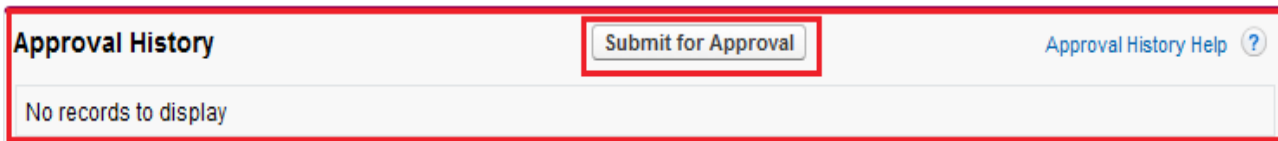
Step 5 :-

After that you need set page layout in Custom object (Ex: Job applications)

Click on Custom object(Job Applications) > Select any Field(Job application) > then click on **Edit Layout** link.
Click on **Button** link then **Submit for Approval** button you can drag and drop.



After that click on save button then click on any job application field after then scroll down you can see Approval History. see below.
and Click on **Submit For Approval** button for submit this Approval process.



After click Submit for Approval button Approval History lock like. see below.
There is you can see Overall Status is Pending.

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Step 1 (Pending for first approval)						
Reassign Approve / Reject	10/24/2013 2:20 PM	Pending	Vikram vadav	Vikram vadav		Pending
Approval Request Submitted						
	10/24/2013 2:20 PM	Submitted	vqesh sharma	vqesh sharma		

Step 6 :-

This screen is Manager screen. you can see below.

Click on **Approve/Reject** link Manage approve or Reject this Process.

Action	Related To	Type	Most Recent Approver	Date Submitted
Reassign Approve / Reject	JD-009	Job Application	sharma.yogesh	10/24/2013 1:50 AM

After that if want to Approve this process click on Approve button or click Reject button for Reject this process.

Approval Request
Job Application: JD-009
Help for this Page ?

← Back to Job Application: JD-009

Approve/Reject Approval Request

Job Application # JD-009
Owner [yogesh sharma](#)
Comments
Enter here Coments .

Step 7 :-

After approve process by Manager you can see you page approve status will be changed, see below.

There is Overall Status is Approved.

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Step 1						
	10/24/2013 2:37 PM	Approved	Vikram vadav	yogesh sharma	ok that it.	Approved
Approval Request Submitted						
	10/24/2013 2:20 PM	Submitted	yogesh sharma	yogesh sharma		

Email Alerts

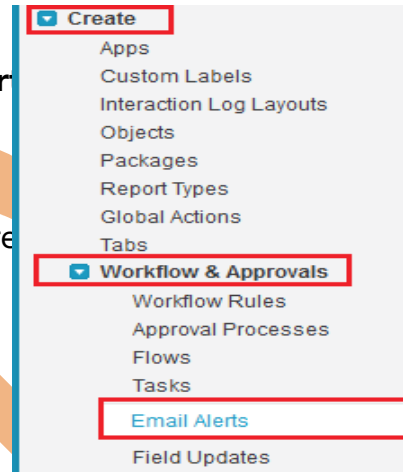
Email alerts are emails generated by a workflow rule or approval process and sent to designated recipients whenever specific business actions trigger the workflow rule or approval process. Must specify an email template for email alerts.

To Get Started Using Email Alerts

Step > Creates > Workflow & Approval > Email Alerts

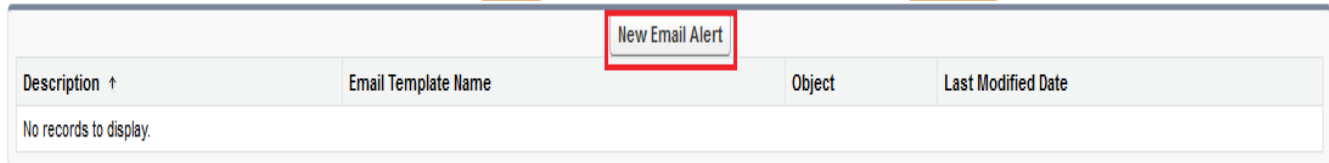
From this page you can :

- Create a new email alert.
- Select an existing email alert to view details about it, create a new email alert, or view all the rules using it.
- Edit an existing email alert.
- Delete an email alert.



Step 1 :-

Click on **New Template** button.



Step 2 :-

Edit Email Alert

[Help for this Page](#)

Inform to all

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

The 'Email Alert Edit' form includes: 'Save', 'Save & New', and 'Cancel' buttons; a 'Description' field with 'Inform to all'; a 'Unique Name' field with 'Inform_to_all'; an 'Object' dropdown with 'Employee'; an 'Email Template' field with 'Support Self-Service F'; a 'Protected Component' checkbox; a 'Recipient Type' field with 'Search: User' and a 'Find' button; and a 'Recipients' section with 'Available Recipients' (User: yogesh sharma) and 'Selected Recipients' (User: Vikram yadav) lists, and 'Add' and 'Remove' buttons between them.

You can enter up to five (5) email addresses to be notified.

Additional Emails

From Email Address | Current User's email address ▾

Make this address the default From email address for this object's email alerts. ⓘ

Save Save & New Cancel

1. Enter a description.
2. Enter a unique name to refer to this component in the API.
3. choose the object for this email alert If available in dropdown.
4. Choose an email template.
5. Select Protected Component to mark the alert as protected if it is part of a Managed - Released package, If available.
6. Select who should receive this email alert. Depending on your organization settings and the object you selected, some options in this list may not be available.
7. Select the recipients who should receive this email alert in the Available Recipients list and click **Add**.
8. Enter up to five additional email addresses.
9. You can change the From Email Address, selecting in dropdown list.
10. Click **Save** button.

Workflow Daily Email Limit

The daily limit for emails sent from workflow and approval-related email alerts is 1000 per standard Salesforce license per organization. The overall organization limit is 2000000. If the default workflow user isn't set, then the warning email is sent to an active system administrator.. When the daily limit is reached, a warning email goes out to the default workflow user.

Reports and Dashboards in Salesforce

SalesForce.com provides powerful reporting and generation tools on the data stored in the objects.

by using reports in Salesforce you can generate four types reports.

- 1. Tabular Form Report** - This is the most basic report. It displays just the row of records in a table like format with grand total. Tabular reports cannot be used for generating dashboards.
- 2. Summary Form Report** - This is the most commonly type of report. It allows grouping of rows of data. It supports sorting and displaying subtotals. For example in a recruiting app, a summary report could be used to display open positions classified by department name

3. Matrix Form Report - Group by rows and columns of data to get sub totals and grand totals.

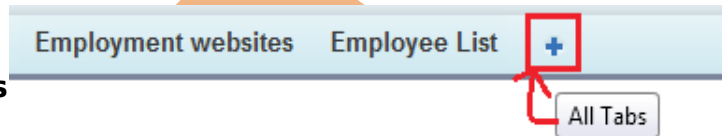
Matrix form report Complex of report.

4. Joined Report - A joined report can contain data from multiple standard or custom report types. You can add report types to a joined report if they have relationships with the same object or objects. For example, if you have a joined report that contains the Opportunities report type, you can add the Cases report type as well because both have a relationship with the Accounts object.

How to Enable Reports & Dashboard in salesform.com

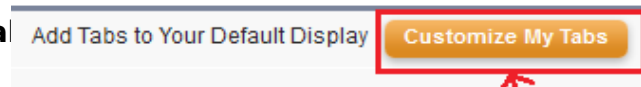
Step 1 :-

In SelesForce.com Click on **All Tabs**



Step 2 :-

After that on this page you can see right and top side **Customization My Tabs** Click on this button.



Step 3 :-

Customize My Tabs

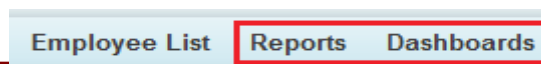
Choose the tabs that will display in each of your apps.

Custom App:

Recurment Mangment

Select Custom App.

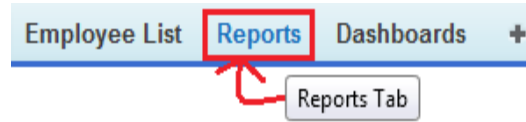
1. Select Custom app click on **Custom App** dropdown menu.
2. Select Reports & Dashboard in **Available Tabs**.
3. Click on **Add** button.
4. After you can see Reports & Dashboards available in Selected Tabs.
5. Click on **Save** button.



After that you can see in you tab on Salesforce.com.

How To Create Report

Click on **Reports Tab**.

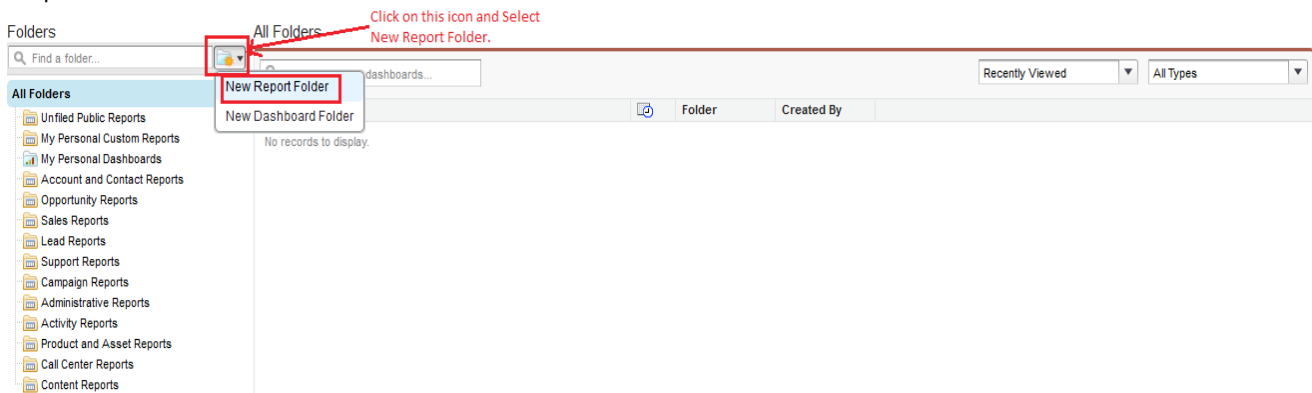


Step 1 :-

Firstly you need to create folder Click on icon then click **New Report Folder**.

Reports & Dashboards

[Guided Tour | Help for this Page](#)



Step 2 :-

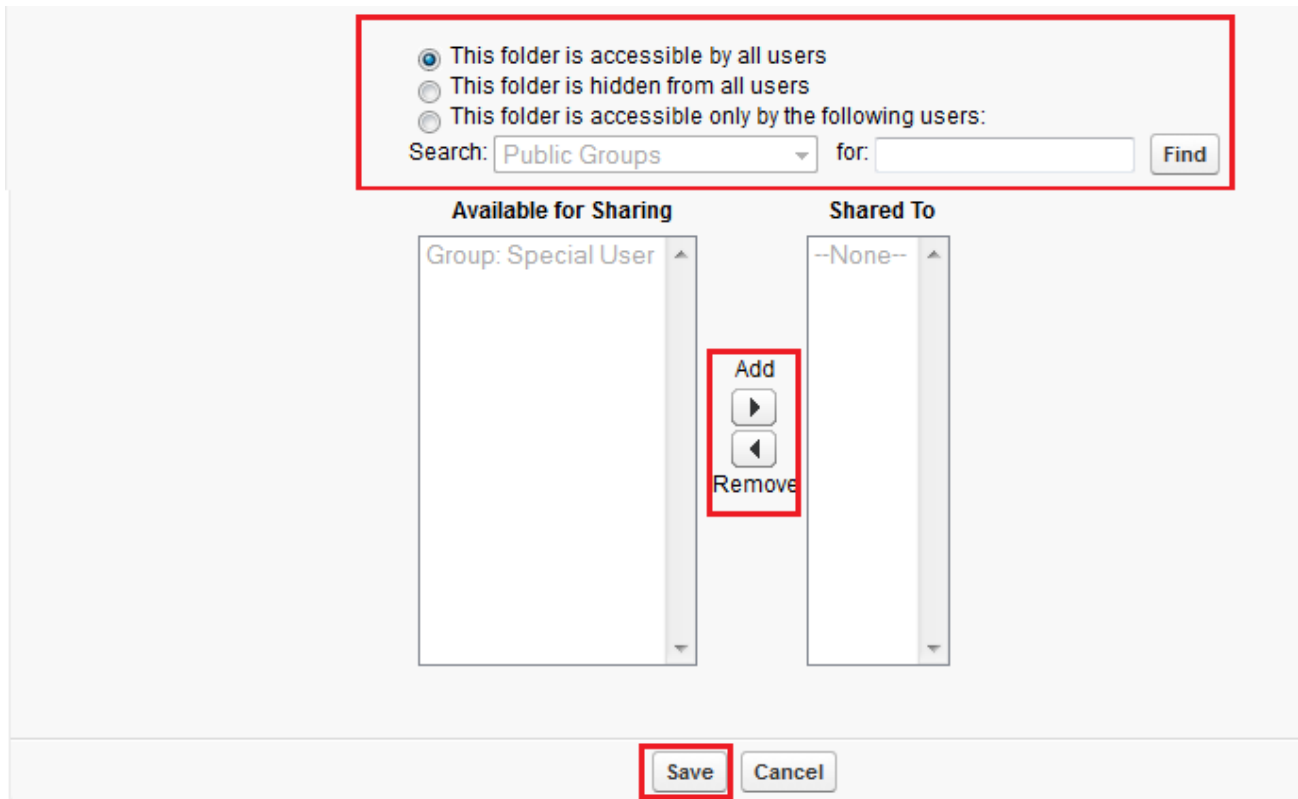
then you can see new page.

New Report Folder

Folder Edit

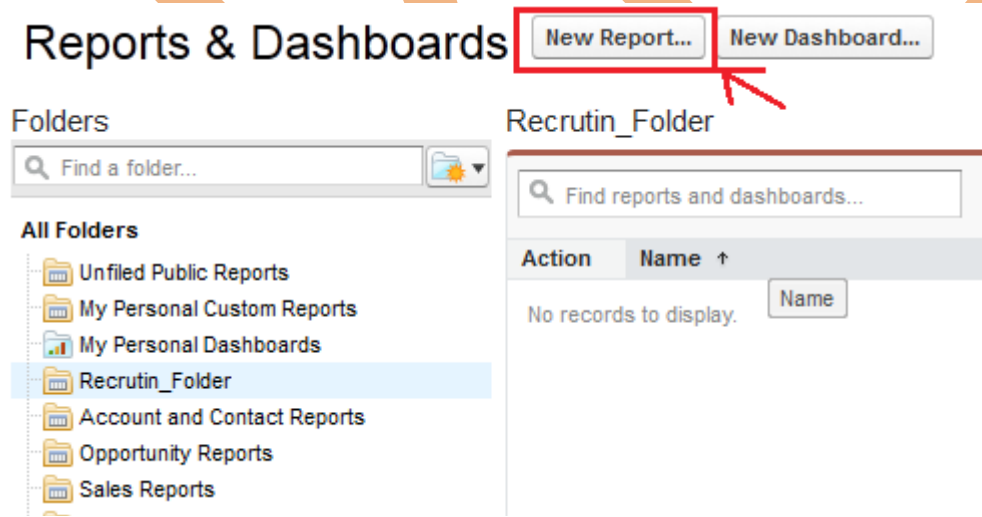
Report Folder Label	<input type="text" value="Recrutin_Folder"/>
Folder Unique Name	<input type="text" value="Recrutin_Folder"/> <input type="button" value="i"/>
Public Folder Access	<input type="text" value="Read/Write"/>

Unfiled Public Reports	Reports in this Folder
--None--	--None--
<input type="button" value="Add"/> <input type="button" value="Remove"/>	



Step 3 :-

After then click on New Report button.

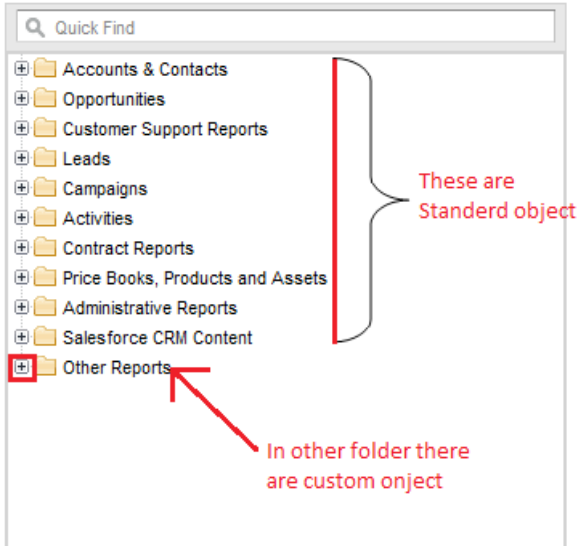


Step 4:-

There are many Standard Object click on plus icon for expanding data. and in you can see other reports folder this folder belong to custom Object.

Create New Report

Select Report Type



Quick Find

- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contract Reports
- Price Books, Products and Assets
- Administrative Reports
- Salesforce CRM Content
- Other Reports

These are Standard object

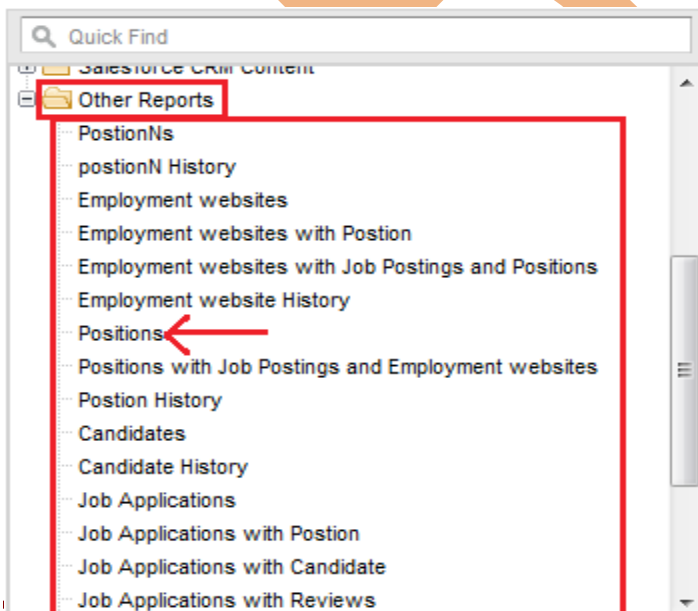
In other folder there are custom object

Preview

Account Report

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

click on Other Reports folder you can see there is many custom object choose any one custom object according your requirement, after select custom object click on Create button.



Quick Find

- Other Reports
 - PositionNs
 - positionN History
 - Employment websites
 - Employment websites with Postion
 - Employment websites with Job Postings and Positions
 - Employment website History
 - Positions
 - Positions with Job Postings and Employment websites
 - Postion History
 - Candidates
 - Candidate History
 - Job Applications
 - Job Applications with Postion
 - Job Applications with Candidate
 - Job Applications with Reviews

Cancel Create

Tabular Format :

Tabular report. This is the most basic report. It displays just the row of records in a table like format with grand total. Tabular reports cannot be used for generating dashboards.

Step 5 :-

In this page you can see custom object fields available just drag and drop this field's.

1. select any field then drag and drop right side on this page.
2. if want to add filter click on add button.
3. select your position by using drop down.
4. if want to change format click on icon change this format type.
5. if you want to remove all fields click on Remove All Column link.
6. if want Remove single field click on icon then click on Remove column link.
7. After that click on Run Report.

Save Save As Close Report Properties Add Report Type Run Report 7

Fields All #

Quick Find

Drag and drop to add fields to the report.

Bucket Fields

Add Bucket Field

Position: Info

1

2

3

4

4

5

6

7

You also add Filters click on Add button

Select your position for ex :-My Team position, All positions

Select DateField

Click here for change report format

Click here remove all column

click here You can also Remove this column

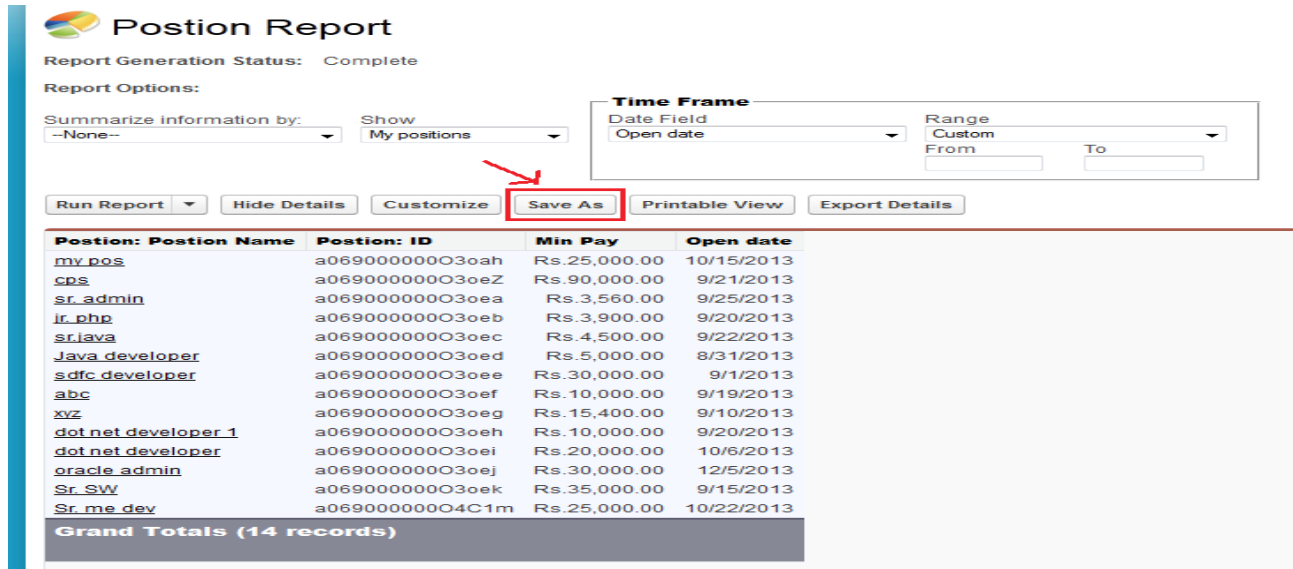
Select any field and just drag and drop on right side

Preview

Position: Position Name	Position: ID	Min Pay	Open date	Position: Created Date
jr. php	a0690000003oeb	Rs.3,900.00	9/20/2013	10/15/20
sr.java	a0690000003oec	Rs.4,500.00	9/22/2013	10/15/20
Java developer	a0690000003oed	Rs.5,000.00	8/31/2013	10/15/20
sdfc developer	a0690000003oee	Rs.30,000.00	9/1/2013	10/15/20
abc	a0690000003oef	Rs.10,000.00	9/19/2013	10/15/20
xyz	a0690000003oeg	Rs.15,400.00	9/10/2013	10/15/20
dot net developer 1	a0690000003oeh	Rs.10,000.00	9/20/2013	10/15/20
dot net developer	a0690000003oei	Rs.20,000.00	10/6/2013	10/15/20
oracle admin	a0690000003oej	Rs.30,000.00	12/5/2013	10/15/2013
Sr. SW	a0690000003oek	Rs.35,000.00	9/15/2013	10/15/2013
Sr. me dev	a0690000004C1m	Rs.25,000.00	10/22/2013	10/22/2013
Grand Totals (14 records)				

Step 6 :-

Click on Save As button.



Position Report
Report Generation Status: Complete

Report Options:

Summarize information by: Show

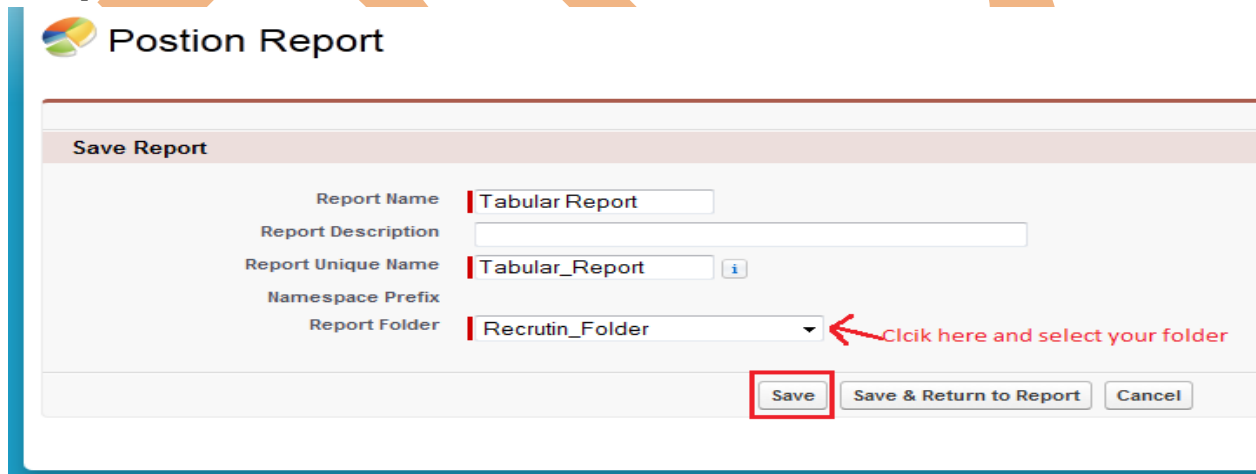
Time Frame
Date Field Range
From To

Position:	Position Name	Position: ID	Min Pay	Open date
my_pos		a069000000O3oah	Rs.25,000.00	10/15/2013
cps		a069000000O3oeZ	Rs.90,000.00	9/21/2013
sr_admin		a069000000O3oea	Rs.3,560.00	9/25/2013
lr_php		a069000000O3oeb	Rs.3,900.00	9/20/2013
sr.java		a069000000O3oec	Rs.4,500.00	9/22/2013
Java_developer		a069000000O3oed	Rs.5,000.00	8/31/2013
sdfc_developer		a069000000O3oee	Rs.30,000.00	9/1/2013
abc		a069000000O3oef	Rs.10,000.00	9/19/2013
xvz		a069000000O3oeg	Rs.15,400.00	9/10/2013
dot_net_developer_1		a069000000O3oeh	Rs.10,000.00	9/20/2013
dot_net_developer		a069000000O3oei	Rs.20,000.00	10/6/2013
oracle_admin		a069000000O3oej	Rs.30,000.00	12/5/2013
Sr_SW		a069000000O3oek	Rs.35,000.00	9/15/2013
Sr_me_dev		a069000000O4C1m	Rs.25,000.00	10/22/2013

Grand Totals (14 records)

Step 7 :-

Fill all the field's , select your folder and click to save button.



Position Report

Save Report

Report Name

Report Description

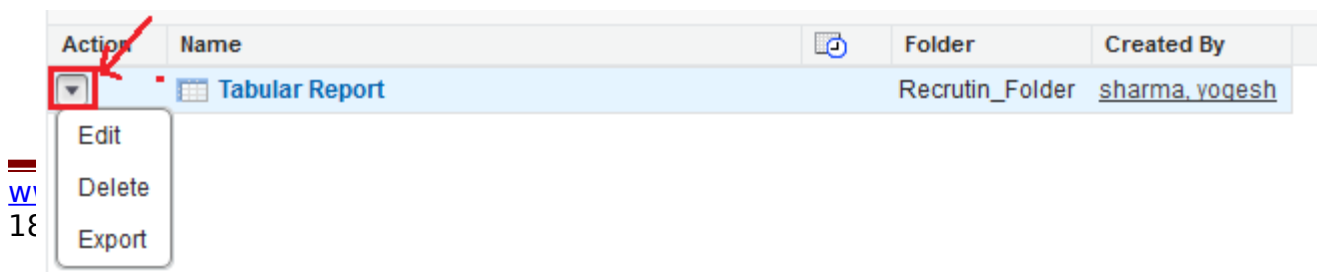
Report Unique Name

Namespace Prefix

Report Folder **Click here and select your folder**

Step 8 :-

After Save you can see new page there you can see Tabular Report available if you want to Edit, Delete, Export click on icon and you can do it.



Action	Name	Folder	Created By
<input type="button" value="v"/>	Tabular Report	Recrutin_Folder	sharma_yogesh

- Edit
- Delete
- Export

Summary Format :

This is the most commonly type of report. It allows grouping of rows of data. It supports sorting and displaying subtotals. For example in a recruiting app, a summary report could be used to display open positions classified by department name.
step 1 to Step 4 same as previous.

Step 5 :-

step 1 to 4 is same is it previous.

5. Click on Add Chart button for adding chart.

Save Save As Close Report Properties Add Report Type Run Report 6

Fields All #

Quick Find

Drag and drop to add fields to the report.

Bucket Fields

Add Bucket Field

Position: Info 1

Position: ID

Position: Position Name

Min Pay Drag and Drop field here

Open date

Position: Record Type

Position: Owner Name

Position: Owner Alias

Position: Owner Role

Position: Created By

Position: Created Alias

Position: Created Date

Position: Last Modified By

Position: Last Modified Alias

Position: Last Modified Date

Position: Last Activity Date

Filters Add 2

Show My positions 3

Date Field Open date Range All Time From To 4

Position: ID equals OK Cancel

Preview Summary Format Show Add Chart Remove All Columns 5

positionID: position Name

Max Pay: Rs.650,000.00 (1 Record)

Min Pay: Rs.2,350,000 (1 Record)

Drop a field here to create a grouping. Hi

Business

Max Pay: Rs.850,000.00 (1 Record)

Min Pay: Rs.350,000 (1 Record)

Software Engineer

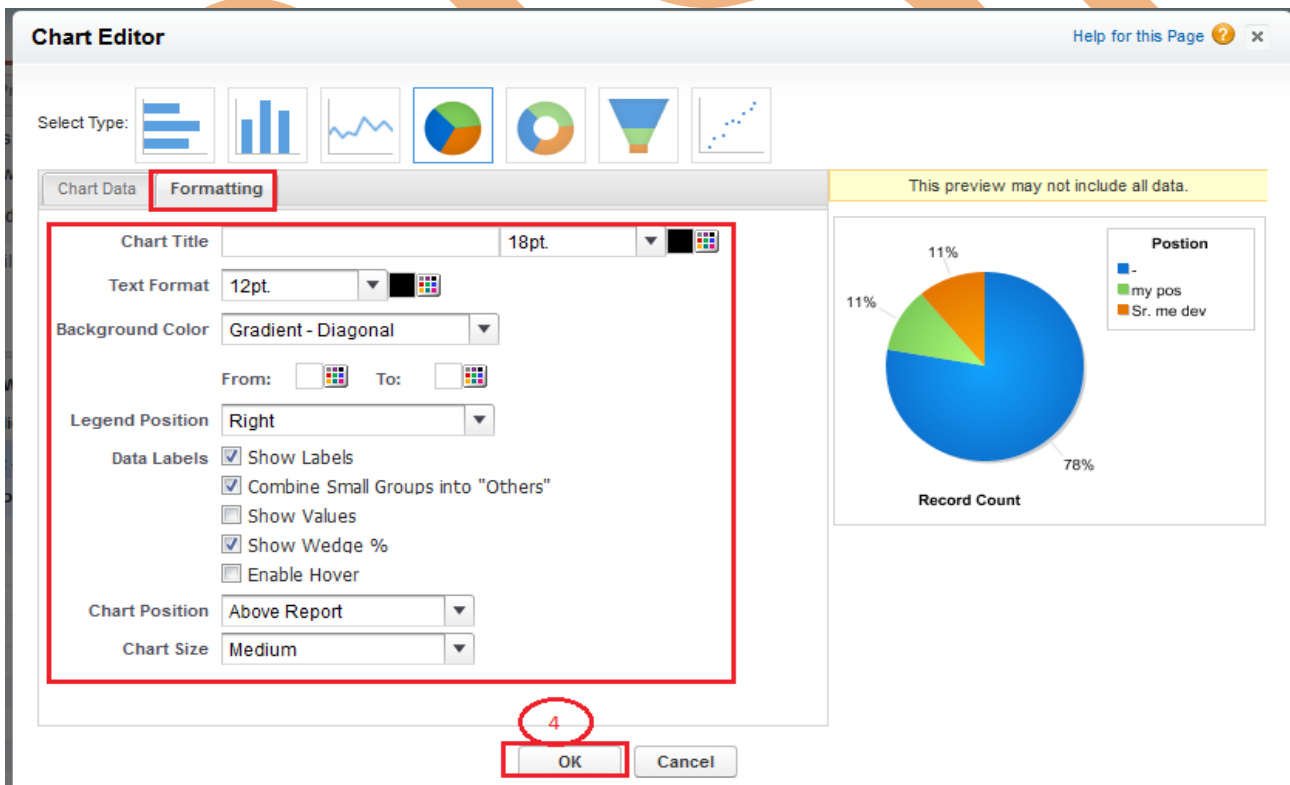
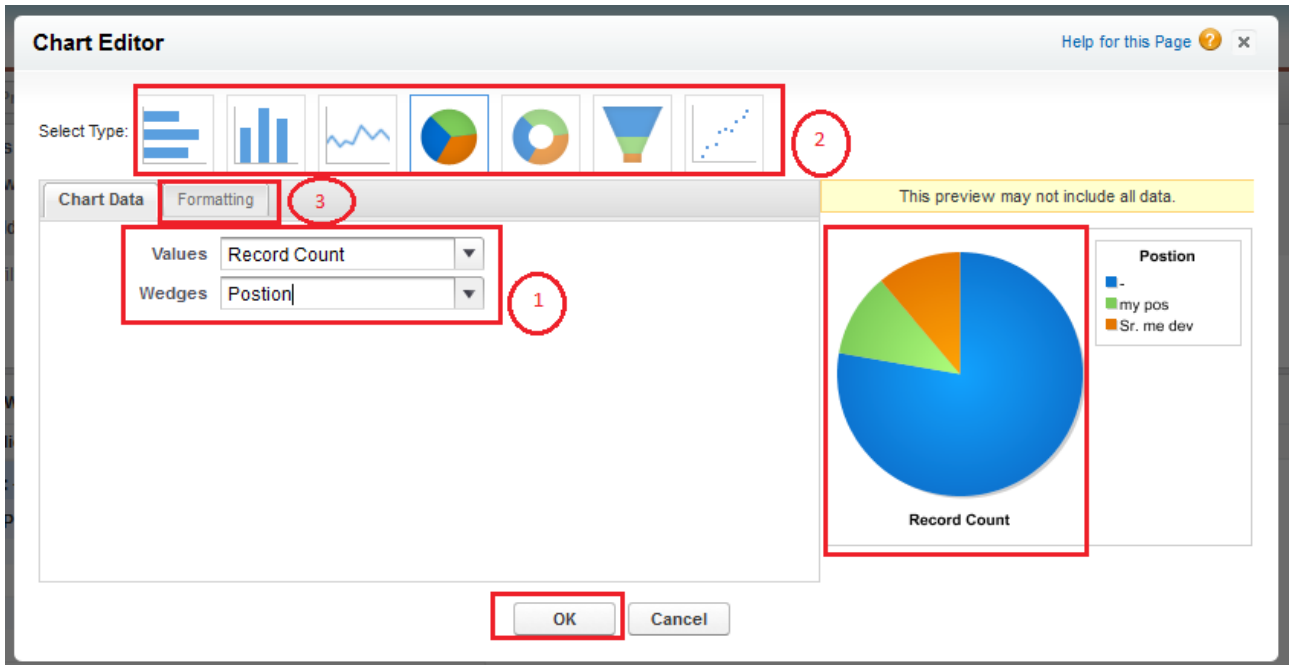
Grand Totals (2 records)

This preview shows a limited number of records. Run the report to see all results.

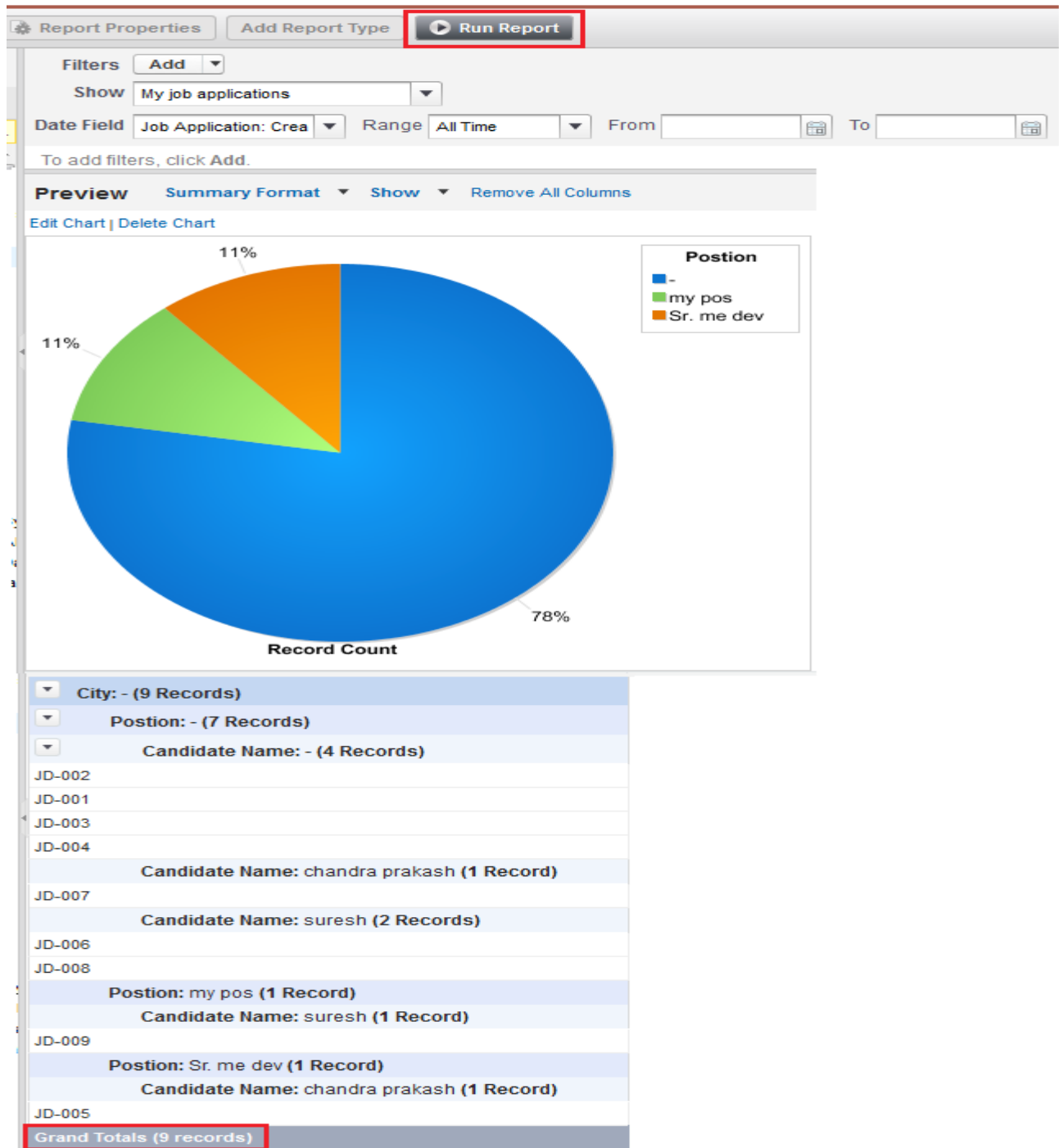
Select any field and just drag and drop on right side

Step 5.1 :-

Then you have see one new popup page in this page called as chart editor. select any char then click on ok button.

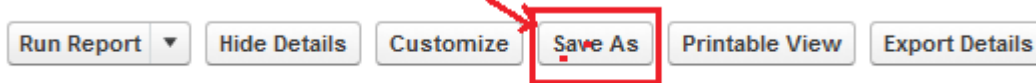


1. Select Value and wedges.
 2. choose what you type chart.
 3. click on Formatting Tab.
- Then choose some property which you want.
4. Click on Ok button.
- After click on Run As.



Step 6 :-

Click on Save As button.



Step 7 :-

Fill all field's select folder name Then click on Save button.

A screenshot of the 'Save Report' dialog box. It contains the following fields and controls:

- Report Name: Summary Report
- Report Description: (empty text box)
- Report Unique Name: Summary_Report
- Namespace Prefix: (empty text box)
- Report Folder: Recrutin_Folder (dropdown menu, with a red arrow pointing to it and the text 'Click Here Select You Folder')
- Buttons: Save (highlighted with a red box), Save & Return to Report, Cancel

Matrix Form Report

This is the most complex report format. Matrix report summarize information in a grid format. Matrix reports allows records to be grouped by both columns and rows. step 1 to step4 same as previous.

A screenshot of the report configuration interface. It shows various settings and a preview of the matrix report.

Configuration Settings:

- Buttons: Save, Save As, Close, Report Properties, Add Report Type, Run Report (7)
- Filters: Add (2) - 'You also add Filters click on Add button'
- Show: My positions (3) - 'Select your position for ex :-My Team position, All positions'
- Date Field: Open date, Range: All Time, From: (4) - 'Select DateField', To: (4) - 'Select DateField'
- Position: ID equals (OK, Cancel)
- Format: Matrix Format (5) - 'Click here For change format'
- Buttons: Add Chart, Remove All Columns

Preview Table:

	City	Grand Total
Candidate Name	Drop a field here to create a column grouping.	Drop a field here to create a column grouping.
	Drop summarizable fields into the matrix.	Job Application: Job Application #
	Record Count	4
	Record Count	1
	Record Count	1
	Record Count	1
	Record Count	1
Adie	Record Count	2
	Record Count	1
	Record Count	1
Alice	Record Count	3
	Record Count	1
	Record Count	1
	Record Count	1
	Record Count	1
Grand Total	Record Count	9

Annotations:

- 5: For Row (points to Candidate Name)
- 6: For Column (points to City)

3. Click on Add Report Type button add more different report.
- 4 & 5. Drop a field to group report blocks.
6. Click on Run as button.

Step 6 :-

Run Report Hide Details Report Properties **Save** Save As Customize Delete Printable View Report generation complete.

CANDIDATES Candidates block 1		
Email Id	Mobile Number	Candidate: Candidate Number
bpl@bpl.com	(658) 545-6875	Y-001
a@a.com	65	Y-002

JOB APPLICATIONS Job Applications block 2	
Job Application: Job Application #	Postion
JD-009	my pos
JD-005	Sr. me dev
JD-008	
JD-004	
JD-007	
JD-003	
JD-001	
JD-002	
JD-006	

DEPARTMENTS Departments block 3	
Department: ID	Department: Department Name
a099000000JvawI	Development Department
a099000000JvawR	IT Department
a099000000JwhIT	Sales Department
a099000000Jvnox	Non IT
a099000000JvhhJ	Testing

Grand Totals
(2 records) (9 records) (5 records)

You can see here, there is three different custom object data available here. click on save button for save this report.

Give the Report Name, Unique Name, select Report Folder then click Save button.

Save Report Help for this Page ? x

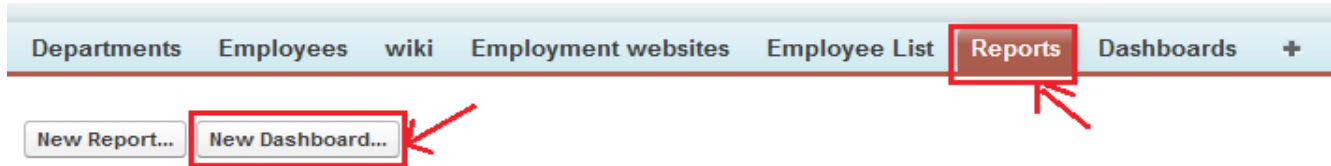
Report Name	<input type="text" value="Joined Report"/>
Report Unique Name	<input type="text" value="Joined_Report"/> i
Report Description	<input type="text"/>
Report Folder	<input type="text" value="Recrutin_Folder"/> ▼

Dashboards in Salesforce

Create a dashboard to provide a graphical view of the data in your reports. you can view daily reports, weekly, monthly. you can all so add on your home page .

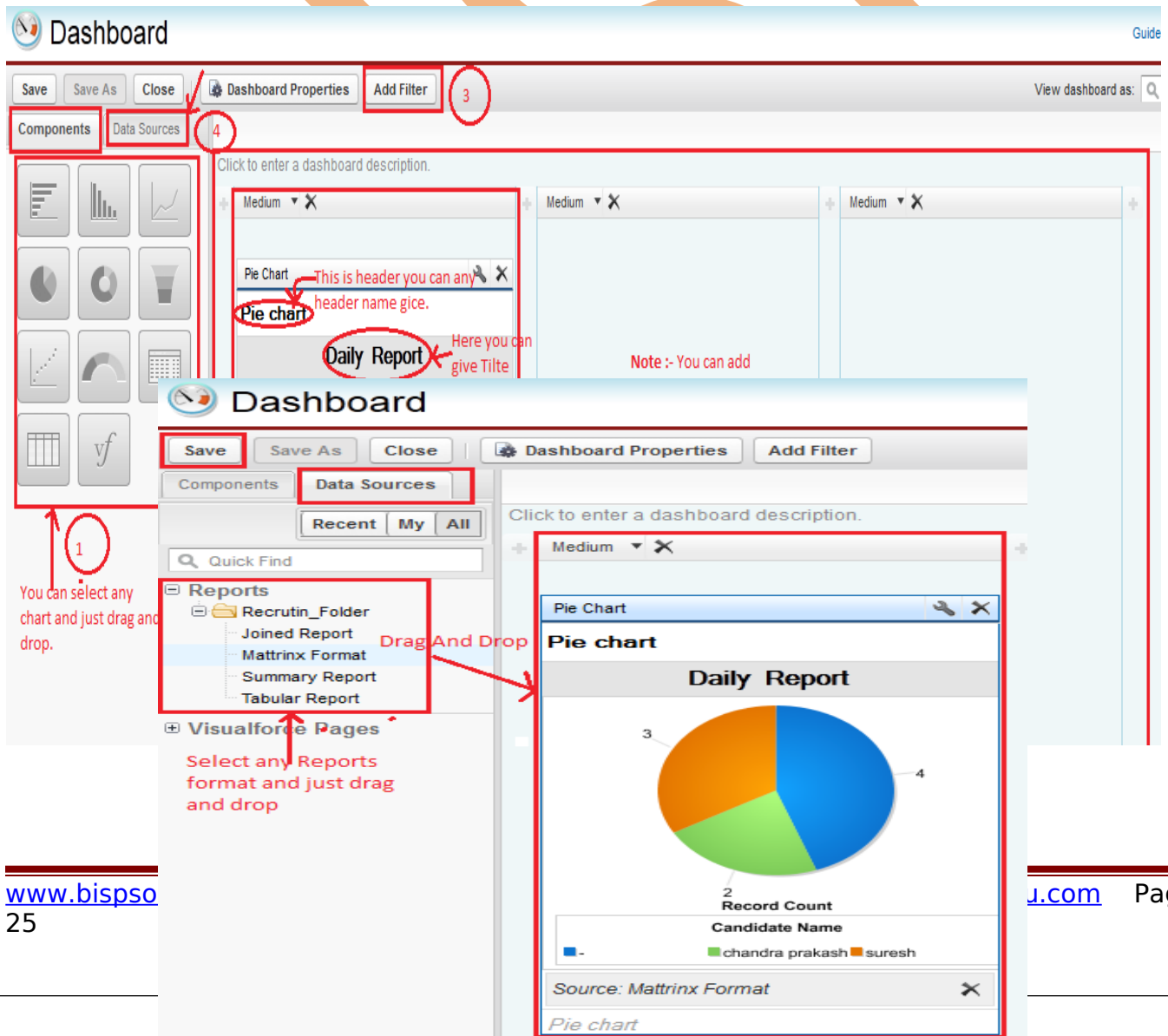
How to Activate Dashboards in Salesforce

Click on Reports then click on New Dashboards button.



Step 1 :-

1. Select Any pie chart and drag and drop.
2. After drag and drop give some header name, title, and footer.
3. If want to add some filter you can add filter but firstly you can click on Data sources button add some source after than you can add filter.
4. Click on Data Sources button.



Dashboard Editor Annotations:

- 1:** You can select any chart and just drag and drop.
- 2:** This is header you can any header name gice.
- 3:** Here you can give Tilt.
- 4:** Note :- You can add

Legend:

- 1: Record Count
- 2: Candidate Name
- 3: chandra prakash
- 4: suresh

Source: Matrinx Format

After Click on Data Source button. click on Repots folder and drag and drop any report type then click on Save button.

Save Dashboard

Title | My Dashboard

Dashboard Unique Name | My_Dashboard i

Folder
To avoid exposing sensitive data to the wrong people, choose a folder visible only to the right users.

Save to | My Personal Dashboards ▼

Save | Save and Run Dashboard | Cancel

Then give Title and Dashboard Unique Name and click to save button.
Now you can click on Dashboards Tab in Salesforce.com you can see Dashboard.

Why Are Set Dashboard Into Home Page

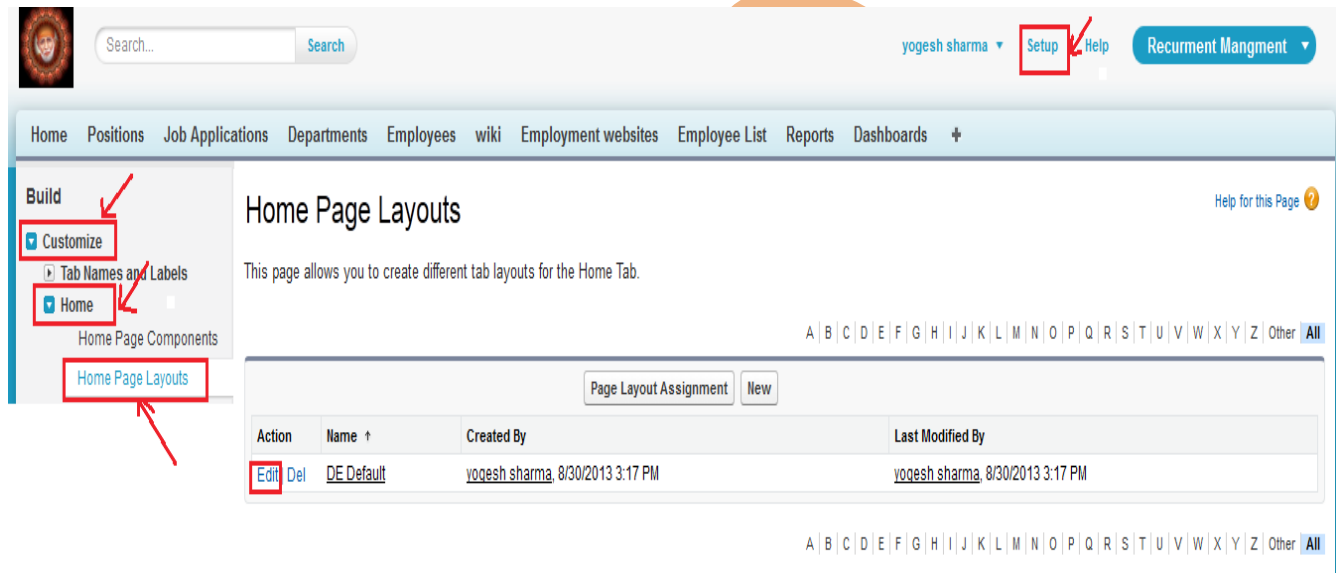
Any organization if set dashboard into home page, they will see daily update our organization on home page by using Dashboard. we will see below.

How Set Dashboard Into Home Page

Step 1:-

Setup > Customize > Home > Home Page Layout

After click on Edit Link button.



Search... Search

yogesh sharma Setup Help Recurment Mangment

Home Positions Job Applications Departments Employees wiki Employment websites Employee List Reports Dashboards +

Build

- Customize
- Tab Names and Labels
- Home
- Home Page Components
- Home Page Layouts

Home Page Layouts

This page allows you to create different tab layouts for the Home Tab.

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 All

Page Layout Assignment New

Action	Name ↑	Created By	Last Modified By
Edit Del	DE Default	yogesh sharma, 8/30/2013 3:17 PM	yogesh sharma, 8/30/2013 3:17 PM

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 All

Step 2:-

Checked Dashboard Snapshot then click on Next button.

Edit Home Layout

Step 1. Select the components to show Step 1 of 2

Choose the components to include on your home page layout.

Layout Name DE Default

Select Wide Components to Show

Items to Approve Calendar
Tasks Dashboard Snapshot

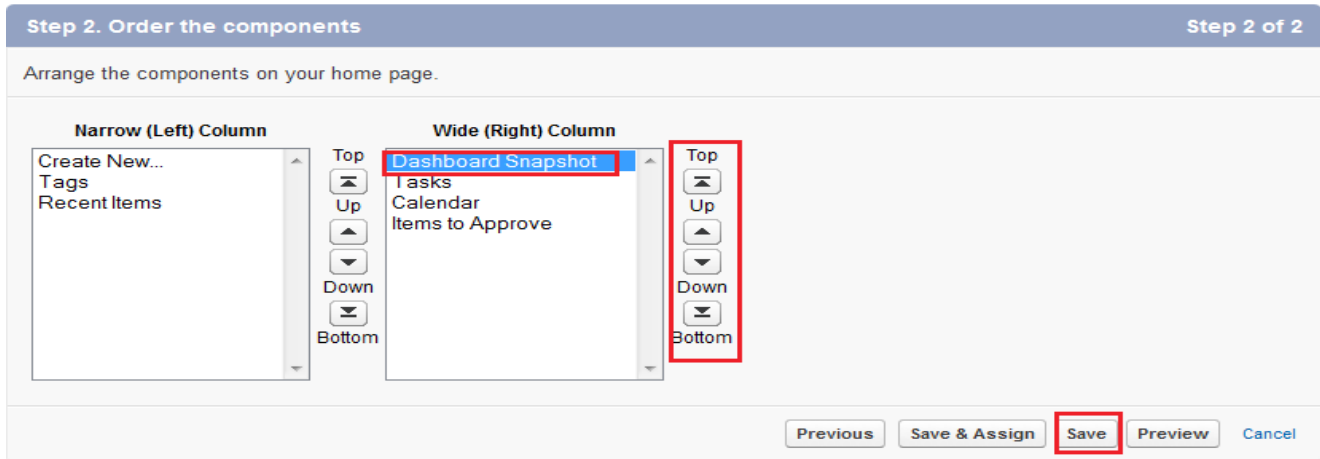
Select Narrow Components to Show

Create New... Recent Items
Messages & Alerts Custom Links
Tags

Next Cancel

Step 3:-

Move Dashboard position then click on Save button. Then click on Home tab you can see Chart is there in home page.



Report Types

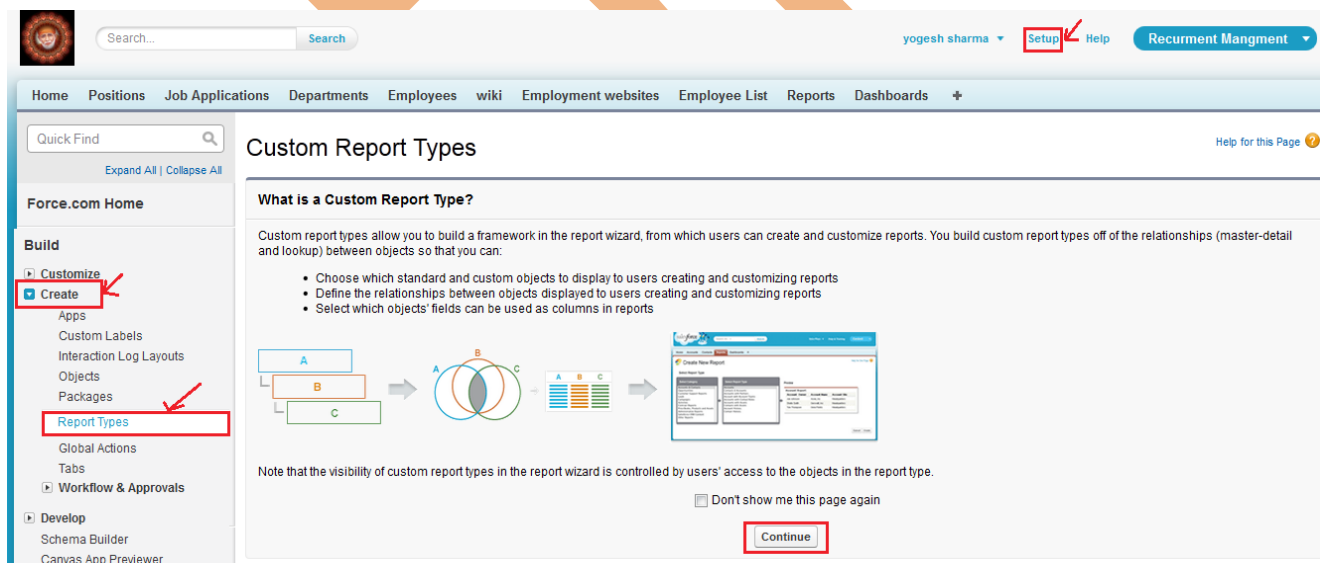
Custom report types allow you to build a framework in the report wizard, from which users can create and customize reports. You build custom report types off of the relationships between objects so that you can.

- Choose which standard and custom objects to display to users creating and customizing reports.
- Define the relationships between objects displayed to users creating and customizing reports.
- Select which objects' fields can be used as columns in reports.

How to Create Report Types

Step > Create > Report Types

Click on continue button.



Step 1 :-

click on **New Custom Reports Type**.

Label ↑	Description	Category	Deployed	Created By Alias	Created Date
No records to display.					

Step 2 :-

Fill the fields, there is all fields are mandatory then click on Next button.

Step 1. Define the Custom Report Type Step 1 of 2

Report Type Focus | = Required Information

Specify what type of records (rows) will be the focus of reports generated by this report type.
Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object

Identification

Report Type Label

Report Type Name i

Note: Description will be visible to users who create reports.

Description

Store in Category

Deployment

A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.

Deployment Status In Development Deployed

Step 3 :-

click on(click to relate another object) add for objects

Step 2. Define Report Records Set Step 2 of 2

Previous Save Cancel

This report type will generate reports about Accounts. You may define which related records from other objects are returned in report results by choosing a relationship to another object.

A Accounts
Primary Object

(Click to relate another object)

A

A

Previous Save Cancel

After click on(click to relate another object) link then you can see below.

A Accounts
Primary Object

B Opportunities
A to B Relationship:
 Each "A" record must have at least one related "B" record.
 "A" records may or may not have related "B" records.

C Products
B to C Relationship:
 Each "B" record must have at least one related "C" record.
 "B" records may or may not have related "C" records.

The selected object has no further relatable objects. [More Info](#)

A B C

A B C

After that click on save button.

There you can see summary of accounts, opportunities, products how many fields available this objects.

Fields Available for Reports		Edit Layout	Preview Layout
Source			Selected Fields
Accounts			49
Opportunities			32
Products			14