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Report folders salesforce

Salesforce provides great feature sharing reports and dashboard folders in Lightning Experience. This enhances folder sharing and allows you to share with users, groups, roles, or territories. Extended folder sharing is the default option for all organizations created since 2013. It is available in all editions. To share a report folder and share a dashboard folder, you must have user rights. When you go to the permission set, you'll see Manage reports in public folders and Manage dashboards in public folders. You can share reports or dashboard folders with up to 25 users, groups, roles, or territories from the UI. Use the Folder Sharing REST API to share folders with up to 500 users, groups, roles, or territories. Let's look at an example of sharing a tutorial report folder. Go to the Reports tab - > Search for the report folder you want to share, and then click the small Aero icon - > Select Share. Follow the screenshot below. From the Share To drop-down, select the person you want to share the name with, and then type the name that you want to match. The name must match the category (user, group, role, etc.) Click Share, and then click Select a folder access level for the user, role, group, or responsibility >Region. Follow the screenshot below. Use the same method for shared dashboards. However, select the Dashboards tab. Create a report or dashboard today and share it with your team. You can save a lot of time. You can also use the reports and dashboard folders to organize reports and specify who can view and edit the reports that are included in the report. You can pin any folder to the top of the list for easy access. The folder is pinned to the top of the list. You can also create folders if you are authorized to create them. If the folder is no longer useful, you can delete it. Salesforce deletes the folder. You're trying to use Salesforce data to understand the percentage of opportunities closed this year. It's pretty frustrating when you click a few hundred clicks. Fortunately, salesforce reports and dashboards make things easier. Compare, evaluate, analyze, and classify data to help your team make the right business decisions. Features with Salesforce reports and dashboards. Reporting and dashboard benefits: Reporting and marketing managers can leverage reports and dashboards in the following ways: Save time: You don't have time to manually dig into many objects, records, and fields to see the answers to your manager's questions together. Reports give you a quick way to answer both simple and complex questions. Flexibility — Use reports and dashboards to retrieve data from all standard and custom objects and fields. It provides a number of powerful options for tailoring reports and dashboards to the specific needs of end users. Stakeholder reporting needs for this projectPractice creating reports and dashboards from start to finish in the Salesforce platform. Track key business information by looking at the reports and dashboards you create for each stakeholder. Stakeholder Reporting Requirements Vp of Sales Simple Report shows all opportunities for the sales team by sales reps closed this year. A report that displays opportunities by sales rep, groups them by close date, and displays them in a table. A matrix report that shows opportunities by pipeline owner, stage, and size for this fiscal quarter. A report that shows the percentage of opportunities won. Visually compare sales reps' win rates. Use dashboards to view important information in sales reports that are also accessible to your team. VP of marketing lists for all customer accounts based in Texas, North Carolina, Illinois and New York with an annual revenue of more than Hot or Farm ratings or \$2 million. The capability to export and work with reports in the CEO spreadsheet software. With just a few clicks, you can help your executive team analyze data in Salesforce. As you progress through this step, do you want to follow along with the trail together and follow with your instructor? In the Resources section, you can see links to the entire session. Create reports and dashboard folders We've received many requests for Salesforce data analytics from various stakeholders. How do you keep it all organized? Create a new report folder called Global Sales Report. If you are not currently using the sales application, click the application launcher and select Sales. Click the Reports tab, and then click New Folder to enter details. Note: If you don't see the New Folder button, we recommend that you create a new Trailhead playground. In Folder Labels, type Global Sales Report. Click the Folder Unique Name text box, and then auto-type a unique name. The unique name of this folder is not checked. Click Save. Repeat steps 3 through 6 to create the following folder as a subfolder under the Global Sales Report folder: In Folder Labels, type Global Sales Dashboard. Click the Folder Unique Name text box, and then auto-type a unique name. The unique name of this folder is not checked. Click Save. Share all new folders with your sales team: Under Folders, click Folders you created. Click the arrow to the right of the Global Sales Dashboard folder and select Share from the menu. From the What to share drop-down, select Roles and Internal Subordinates. In the search role. box, type Channel Sales Team, Eastern Sales Team, and Western Sales Team. Leave Access in the view,Click Finish to close the Share Folders pop-up. Click the Reports tab, and then under Folders, click Author. Repeat steps 2 through 6 to share the Global Sales Report folder. Managed Lightning Experience Reports, Marketing Reports, and Deployment Reports in sub folders are automatically shared with the same team as the parent folder. Resource resources

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