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Create Report and Dashboard Folders

Introduction

Imagine trying to comb through your Salesforce data to figure out what percentage of your opportunities had been closed this year. After a few hundred clicks, you would get pretty frustrated. Luckily, there are Salesforce reports and dashboards to make your life easier. Compare, evaluate, dissect, and categorize data that will help you and your team make the right business decisions. All with the power of Salesforce reports and dashboards.

Benefits of Reports and Dashboards

You and your sales and marketing managers benefit from reports and dashboards in these ways:

- **Visibility into data**—reports and dashboards give you easy access to key data insights, which helps managers make better decisions.
- **Time savings**—you don't have time to manually dig through all your many objects, records, and fields to pull together answers to your manager's questions. Reports give you a quick way to answer both simple or complex questions.
- **Flexibility**—with reports and dashboards you can pull data from all your standard and custom objects and fields. You have many powerful options for tailoring reports and dashboards to the specific needs of your end users.

Your Stakeholders' Reporting Needs

In this project, you'll get hands-on practice building reports and dashboards on the Salesforce platform from start to finish. Let's see the reports and dashboards you'll build for each of your stakeholders to track key business information.

Stakeholder	Reporting requirements
VP of Sales	

	• Simple report showing all of her sales teams' opportunities, by rep, that have been closed won this year. • Report showing opportunities by rep, grouped by Close Date and displayed in a table. • Matrix report showing opportunities by owner, stage, and size in the pipeline this fiscal quarter. • Report showing percentage of closed opportunities being won. • Visual comparison of sales rep win rates. • Dashboard to display key information from her sales reports, which is also to be accessible by her team.
VP of Marketing	• List of all customer accounts based in New York, Massachusetts, Pennsylvania, or New Jersey that have either a prospect rating of Hot or annual revenue over $2 million.
CEO	• Ability to export and manipulate a report in spreadsheet software.

With just a few clicks, you'll be helping your executive team analyze data within Salesforce in no time!

Create Report and Dashboard Folders

You've received a lot of requests from various stakeholders to analyze data in Salesforce. How do you keep it all organized? Start by creating the necessary folders that can be shared with various team members.

Create a new report folder called Global Sales Reports.

1. If you're not currently in the Sales app, click the **App Launcher** and select **Sales**.
2. Click the **Reports** tab.
3. Click **New Folder** and enter the details.
   Note: If the New Folder button is not present, it is recommended you create a new Trailhead Playground.
4. For Folder Label, enter `Global Sales Reports`.
5. Click in the Folder Unique Name text box to auto-populate the unique name. Don't worry, the unique name of this folder isn't checked.
6. Click **Save**.
7. Repeat steps 3-6 to create the following folders as subfolders under the Global Sales Report folder:
   - `Admin Lightning Experience Reports`
   - `Marketing Reports`
   - `Adoption Reports`

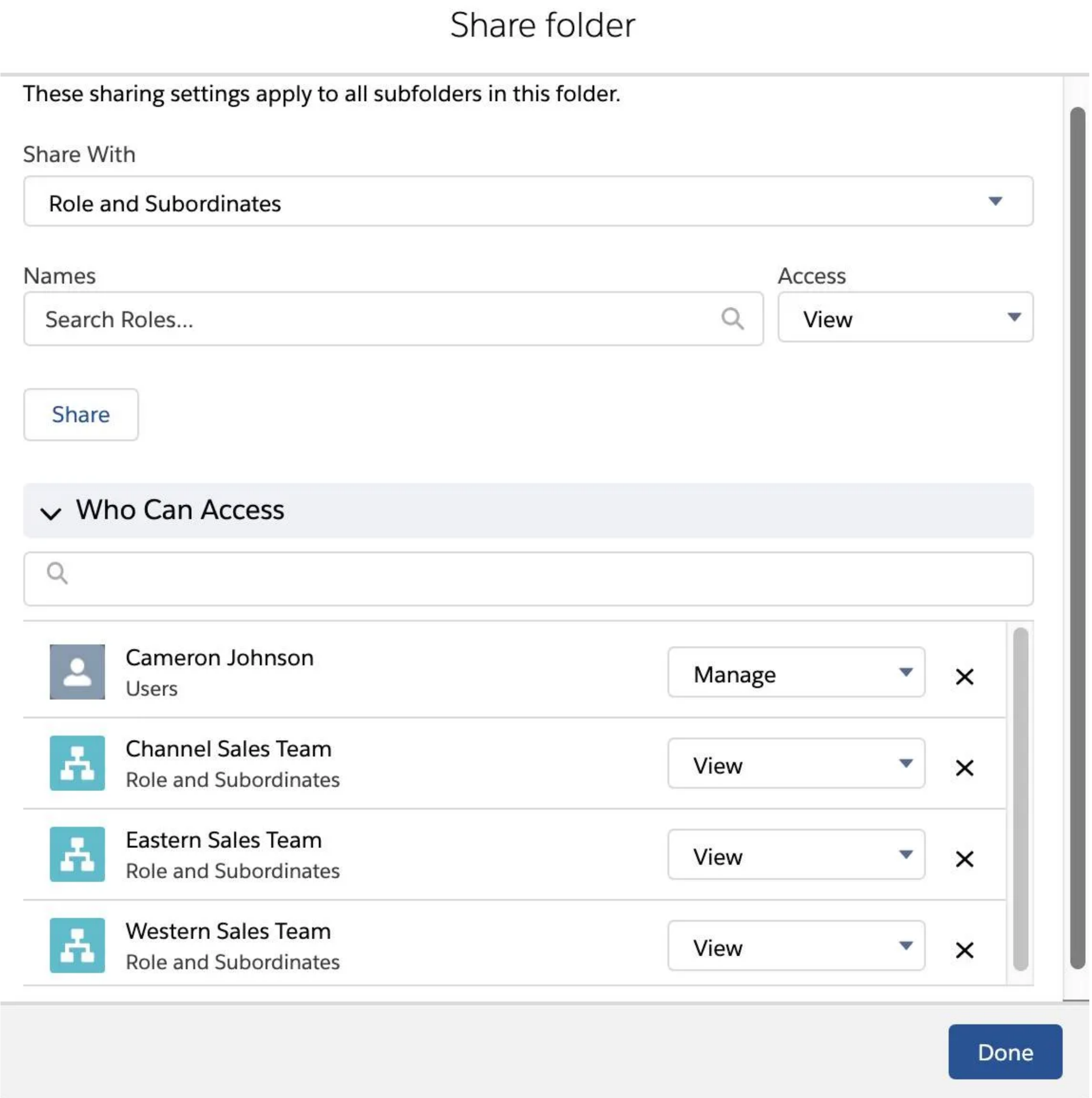
Create a new dashboard folder called Global Sales Dashboards:

1. Click the **Dashboards** tab**.**
2. Click **New Folder** and enter the details.
3. For Folder Label, enter `Global Sales Dashboards`.
4. Click in the Folder Unique Name text box to auto-populate the unique name. Don't worry, the unique name of this folder isn't checked.
5. Click **Save**.

Share all the new folders with the Sales team:

1. Click **Created by Me** under Folders.

2. Click the **arrow** to the right of the Global Sales Dashboards folder, and select **Share** from the menu.
3. From the Share With dropdown, select **Role and Subordinates**.
4. In the Search Roles... box enter and select `Channel Sales Team`, `Eastern Sales Team`, and `Western Sales Team`.
5. Leave Access as **View**, and click **Share**.



6. Click **Done** to close the Share Folder pop-up.
7. Click the **Reports** tab, and click **Created by Me** under Folders.
8. Repeat steps 2-6 to share the **Global Sales Reports** folder. Note that the subfolders Admin Lightning Experience Reports, Marketing Reports, and Adoption Reports will automatically be shared with the same teams as their parent folder.

Assessment Complete!

+100 points

Create Reports and Dashboards for Sales and Marketing Managers
100%
Progress: 100%
Retake this Step
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