

USER GUIDE

> | Create Report Folders in Salesforce

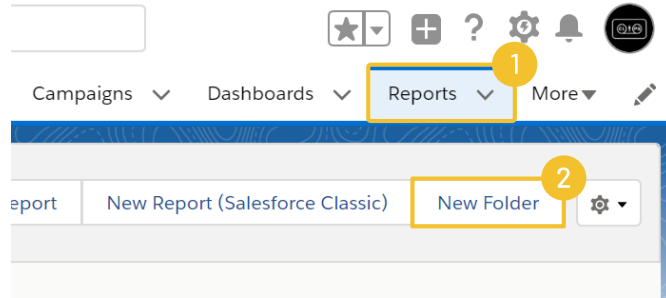
Learn how to create sub folders in Salesforce to organise your reports





Create top level folder

1. Select the Reports tab
2. Click New Folder from the top right

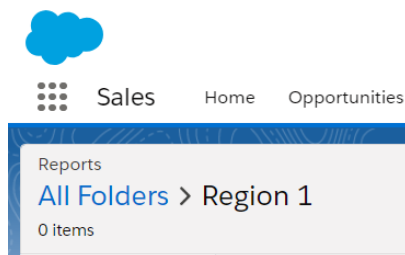


3. Complete the following fields:
 - Folder Label
 - Folder Unique Name

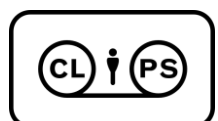
NOTE: The Folder Unique Name will auto populate when the field is selected

4. Click Save

5. The folder has been created



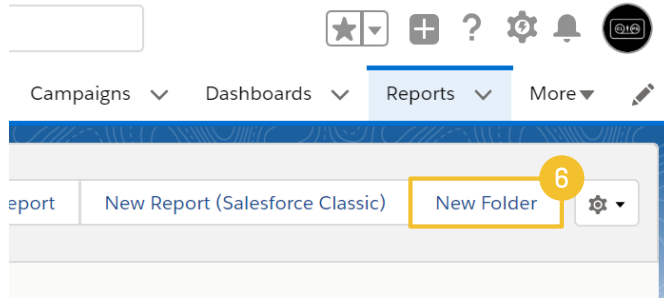
Continue on next page





Create sub folder

6. From the new folder, click New Folder

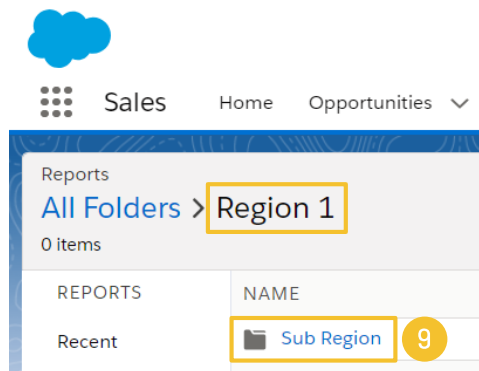


7. Complete the following fields:

- Folder Label
- Folder Unique Name

8. Click Save

9. The sub folder has been created within the top level folder



End of Create Report Folders in Salesforce

