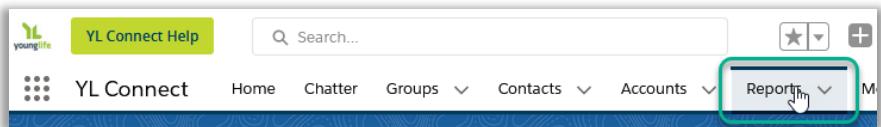


This Field Note covers how to: Create a Folder, Share a Folder, Save to your Folders, and Access Reports Folders.

Create a Folder

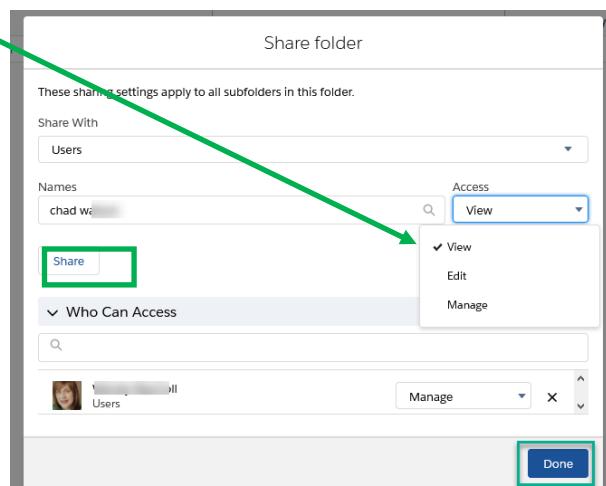
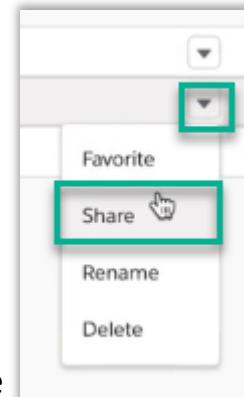
- Click **Reports** tab
- Click **New Folder** button in top right corner
- Type in your Folder Label Name
- Click **Save** button



Share a Folder

*See Video "[How to Share Report Folders with other staff](#)"

1. On left menu under **Folders** click **Created by Me**
2. Locate the Folder name, click dropdown arrow on far right at end of row
3. Click **Share**, and Share Folder screen displays
 - **Share With Users** is default setting
4. Type in name to search (*select as many names as needed*)
5. Choose **Access** level from dropdown for each name (*View, Edit, Manage*)
6. Click **Share**
7. Click **Done**



NOTE: These sharing settings apply to all subfolders in this folder.

Saving Reports into your Folder

1. Open the Report
2. Click the dropdown to the right of the Edit button
3. Click **Save As**

The screenshot shows the Salesforce classic interface with a report titled 'Report: YL Ministry Affiliations' and 'Kids by Ministry Report'. The 'Edit' button has a dropdown arrow, which is highlighted with a green box. Below it, the 'Save As' button is also highlighted with a green box. A 'Save Report As' dialog box is open, showing the 'Report Name' field with 'Copy of Kids by Ministry Report' and the 'Report Unique Name' field with 'Copy_of_Kids_by_Ministry_Report_Qff'. The 'Report Description' field contains a note about the report showing kids grouped by mission unit and ministry. A blue arrow points from the 'Select Folder' button in the 'Save Report As' dialog to a 'Select' dialog box. The 'Select' dialog shows a list of folders under 'All Folders > Shared BETA Reports', including 'Camp Private Folder', 'Shared BETA Reports', and 'T'. The 'Select Folder' button in the 'Select' dialog is also highlighted with a green box. The 'Select' dialog has a message at the bottom: 'Nothing here. This folder has no subfolders.'

4. Type in Report Name
(“Copy of” is default & Report Unique name auto fills)
5. Click **Select Folder** in right corner
6. Search, or choose from list of All Folders
(may need to click first, before seeing All Folders option)
7. Choose Folder you would like to save to
(or use New Folder button, if available)
8. Click **Select Folder** button
9. Click **Save** button
 - When display returns to “Save Report As” screen

NOTE: To Move a report you created into a **different folder:**

- Click on **Reports** tab
- Click the dropdown arrow at the end of the row
- Select **Move**
- Choose Folder you are moving report to
- Click **Select Folder** button

Accessing Reports Folders

- To navigate the reports folder menus and access commonly used folders, start with **Reports** tab.
- Scroll down and look for **FOLDERS** on left menu
- Click **All Folders**
- Click on the Reports folder you wish to access
 - **Note: Field Report Templates** contains many commonly used reports

The screenshot shows the Salesforce YL Connect interface. At the top, the navigation bar includes 'YL Connect', 'Home', 'Chatter', 'Groups', 'Contacts', 'Accounts', 'Payments', 'Reports' (which is highlighted with a green box), and 'Calendar'. The 'Reports' section displays 'Recent' reports (8 items) and a table for 'RECENT' reports. A tooltip for 'Last Fiscal Year Donor Summary' is shown. A large grey arrow points from the 'Reports' tab in the top navigation to the 'Reports' section in the main content area. A green box highlights the 'All Folders' link in the 'FOLDERS' section of the sidebar. The main content area shows the 'All Folders' list with 13 items, including 'RECENT' and 'FOLDERS' sections. A green box highlights the 'Field Report Templates' folder in the 'FOLDERS' section of the 'All Folders' list.

REPORTS	Report Name	Description	Folder
Recent	Last Fiscal Year Donor Summary	Top donors in the current year with summarized total and Address. Adjust filters: Date, Mission Unit, and Transaction Type.	Donor Reports
Created by Me	Camp Payments	This report is used to view your Camp Payments and to see which payments are available to refund.	YL Connect Camp Reports
Private Reports	Refund Report		
Public Reports	Total Revenue	Chart shows the break down of fiscal year to date revenue by class code name.	Mission Unit Charts
All Reports	Class Code FYTD		

REPORTS	Name
Recent	Camp Private Folder
Created by Me	Division Core Ministry Counts Reports
Private Reports	Events Beta
Public Reports	Field Report Templates
All Reports	Shared BETA Reports
FOLDERS	State of the Mission
All Folders	Test Folder WM
Created by Me	US Regional Admins
Shared with Me	WI28 - Mt Horeb
	YL Alumni and Friends
	YL Connect Email Templates
	YL Connect Training

If you need assistance, please contact Help Desk: helpdesk@sc.younglife.org