

What Does Subscribing to a Report Do

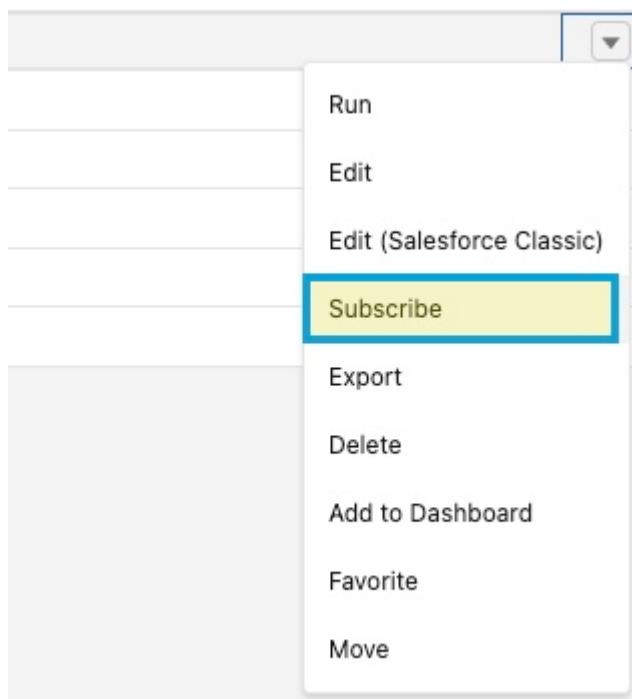
When you subscribe to a report, Salesforce will send you an email with that report at a predetermined time and frequency.

Why Would You Want to Subscribe to a Report

Some examples of business cases for subscribing to a report are viewing a Report before a daily meeting, assessing your teams performance from the previous day, and determining your current status on meeting Key Performance Indicators(KPIs).

How to Subscribe to a Report

1. Click on the **Reports Tab**
2. **Navigate** to the reports folder
3. **Find** the report you want to subscribe to
4. **Locate** the reports line in the list of reports
5. Click on the **down arrow** (Triangle) on the **right** side of the report
6. Click on **Subscribe**



Report drop-down arrow

Master the Art of Active Listening with These 5 Tips

Edit Subscription

Settings

Frequency

DailyWeeklyMonthly

Step 7

Days

SunMonTueWedThuFriSat

Time

7:00 AM

Attachment

Attach File

Step 8

Recipients

Step 9

To add other recipients to this subscription, make sure the report is saved in a shared folder. [Learn More](#)

Run Report As

Step 10

☒ Me
☐ Another Person

Conditions

Step 11

In addition to subscribing, you can set up conditions on this report. You will be notified when conditions are met. This is optional.

☐ Add conditions to this report

Step 12

CancelSave

Report Scheduling Menu

7. Select the **Frequency**, **Days**, and **Time** you want the report delivered.
8. Add any **Attachments** that you would like to attach
9. Choose the **Recipients** (Note: report must be in a shared folder)
10. Choose the **User** you want to run the report as
11. Determine if any **conditions** need to be met to send the report (example: cases open for a certain number of days)

12. Click **Save**

How to Unsubscribe to a Report in Salesforce

The screenshot shows the 'Edit Subscription' interface in Salesforce. It contains several sections: 'Settings' with options for Frequency (Daily, Weekly, Monthly), Days (Sun, Mon, Tue, Wed, Thu, Fri, Sat), Time (7:00 AM), and Attachment (Attach File); 'Recipients' with a note about shared folders and a 'Learn More' link; 'Run Report As' with radio buttons for 'Me' and 'Another Person'; and 'Conditions' with a checkbox to 'Add conditions to this report'. At the bottom, there are three buttons: 'Unsubscribe' (highlighted with a red box), 'Cancel', and 'Save'.

Unsubscribe to a Report

1. Click on the **Reports**
2. Click on the **name of the report** you wish to cancel
3. Click the **drop-down arrow** to the right

4. Click ***Subscribe***
5. Click ***Unsubscribe***