

What Does Subscribing to a Report Do

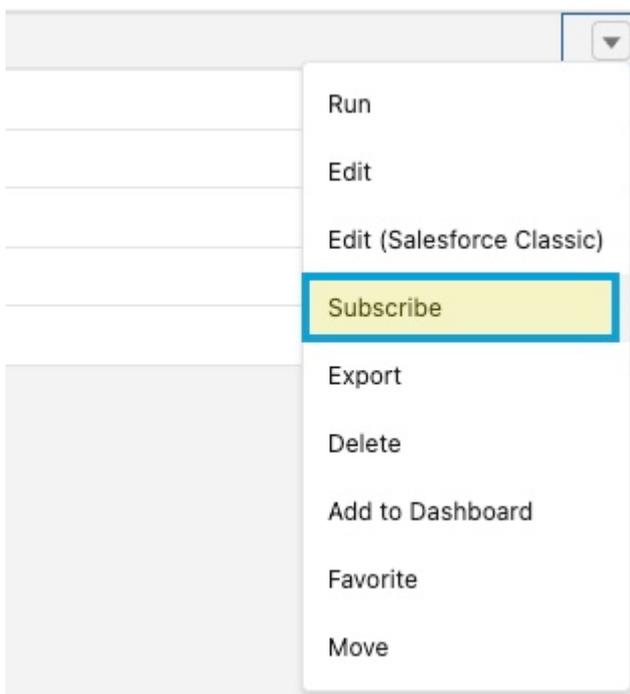
When you subscribe to a report, Salesforce will send you an email with that report at a predetermined time and frequency.

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

How to Subscribe/Unsubscribe to Reports in Salesforce Lightning Experience

Edit Subscription

Settings

Frequency

Daily **Weekly** Monthly

Step 7

Days

Sun Mon Tue **Wed** Thu Fri Sat

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

Cancel Save

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' dialog in Salesforce Lightning Experience. The dialog is titled 'Edit Subscription' and contains several sections:

- Settings**
 - Frequency:** Three buttons: 'Daily', 'Weekly' (selected), and 'Monthly'.
 - Days:** Seven buttons: 'Sun', 'Mon', 'Tue', 'Wed' (selected), 'Thu', 'Fri', and 'Sat'.
 - Time:** A dropdown menu showing '7:00 AM'.
 - Attachment:** A button labeled 'Attach File'.
- Recipients**
 - A text prompt: 'To add other recipients to this subscription, make sure the report is saved in a shared folder. [Learn More](#)'
- Run Report As**
 - Two radio buttons: 'Me' (selected) and 'Another Person'.
- Conditions**
 - A text prompt: 'In addition to subscribing, you can set up conditions on this report. You will be notified when conditions are met. This is optional.'
 - A checkbox labeled 'Add conditions to this report'.

At the bottom of the dialog, 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

How to Subscribe/Unsubscribe to Reports in Salesforce Lightning Experience

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