

Support Document for Hourly ReporteX product

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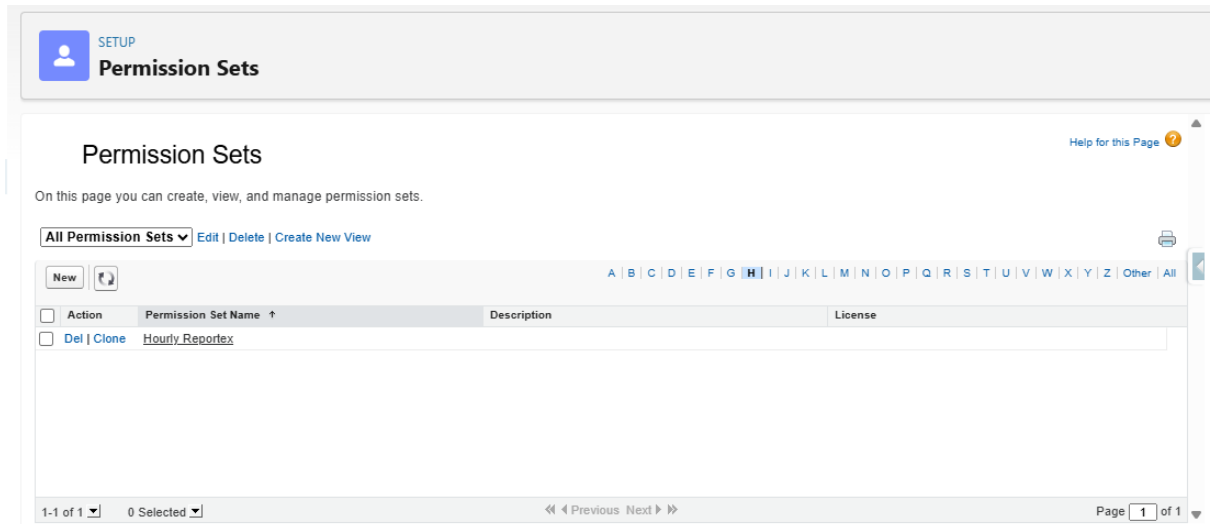
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Step 1:

Install the Package

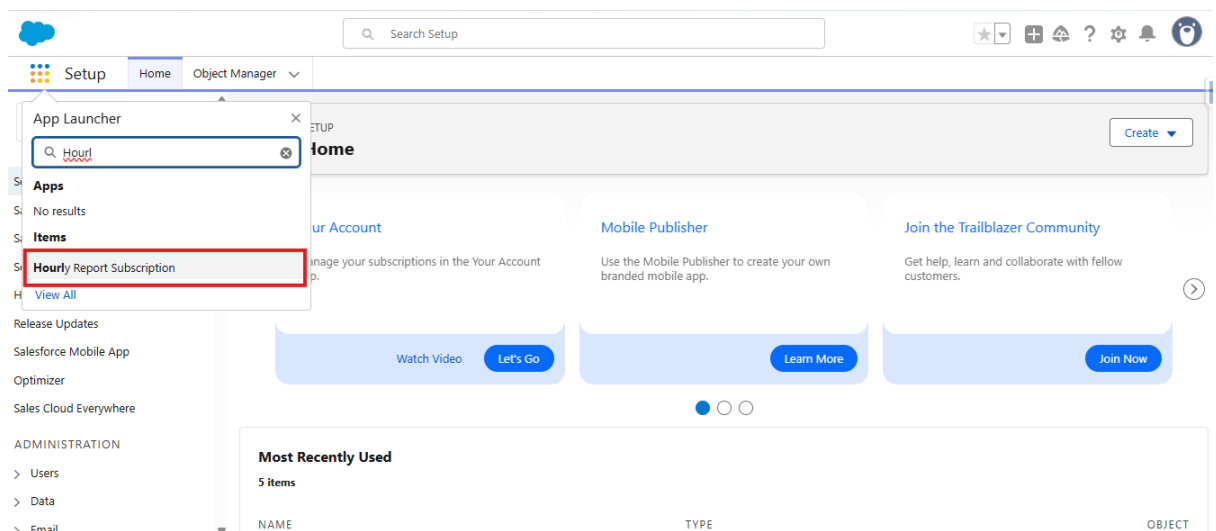
Step 2:

Assign the **Hourly ReporteX Permission set** to the User



Step 3:

Search for **Hourly Report Subscription** in the **App Launcher** and select that.



Step 4:

Once selected, you'll be redirected to the **Hourly Report Subscription** tab. There, you can find **public tabular reports** and **tabular reports created by the logged-in user**.

Hourly Report Subscription

Info You can only subscribe up to 5 reports at a time.

Enter report name to search...

Name	Description	Folder Name	Created By	Created Date	Action	Report Preview
New Sample Report1 Report		Public Reports	Aravindkumar Anbarasan	6/11/2025, 6:30 PM	Subscribe	
New Contacts & Accounts Report		Public Reports	Aravindkumar Anbarasan	5/28/2025, 3:15 PM	Subscribe	
New Accounts Report		Public Reports	Aravindkumar Anbarasan	5/28/2025, 3:14 PM	Subscribe	
New Leads Report 1		Task 1	Aravindkumar Anbarasan	5/21/2025, 11:30 AM	Subscribe	
New Case Report 1		Task 1	Aravindkumar Anbarasan	5/21/2025, 11:29 AM	Subscribe	
New Accounts Report 1		Task 1	Aravindkumar Anbarasan	5/21/2025, 11:14 AM	Subscribe	

Step 5:

Click on **Subscribe** for the report you want to subscribe to. Once you click **Subscribe**, a popup will appear where you can select the users and save it. Once after Save the selected users will receive the report datas as csv format in email.

Edit Subscription

User Name

Q

Please subscribe only to necessary reports. Emails are sent hourly, and subscribing to too many reports or adding excessive users may exceed the Salesforce daily email limit of 5,000. Kindly add only required users to ensure smooth delivery.

Cancel Save

Close button (X)

Edit Subscription

User Name

Search icon

⚠ Recipients see the same report data based on the subscribed user.

Send email to

Search icon Search recipients...

- Aravindkumar Anbarasan (Remove icon)
- Allison Wheeler (Remove icon)

i Please subscribe only to necessary reports. Emails are sent hourly, and subscribing to too many reports or adding excessive users may exceed the Salesforce daily email limit of 5,000. Kindly add only required users to ensure smooth delivery.

Cancel Save

Each log will be captured. Users can see the logs by clicking the Report name