

Configuration Guide

Contents

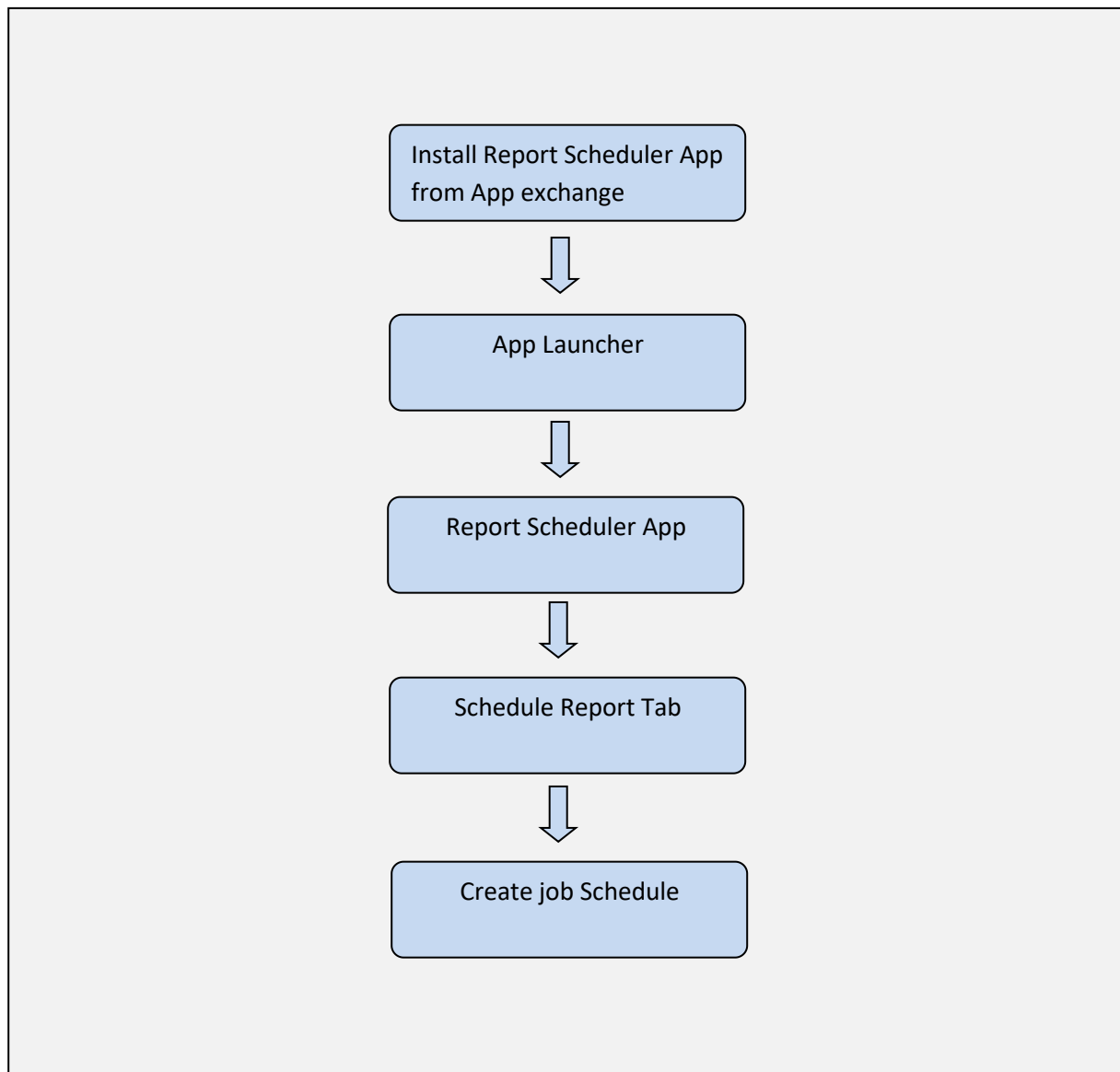
1. Abstract.....	1
2. Flow Diagram.....	2
3. Configuration Instructions.....	3
3.1 Create Job Schedule.....	3
3.1.1 Steps to Create Job Schedule.....	4
3.2 Edit Job Schedule.....	5
3.2.1 Steps to Edit Job Schedule.....	5
3.3 Delete Job Schedule.....	6
3.3.1 Steps to Delete Job Schedule.....	6

1. Abstract

As we are all know that there are few set of limits in Salesforce while subscribing to reports. This application has been developed to eliminate few of those restrictions and achieve the following result.

- ❖ Unlimited reports can be scheduled.
- ❖ Reports can be sent to the Users in an email as an excel/pdf attachments.
- ❖ Users can schedule multiple reports for the same schedule.
- ❖ Once centralized view of existing and new schedules.
- ❖ Users are allowed to schedule reports to external users.
- ❖ 100% native application.

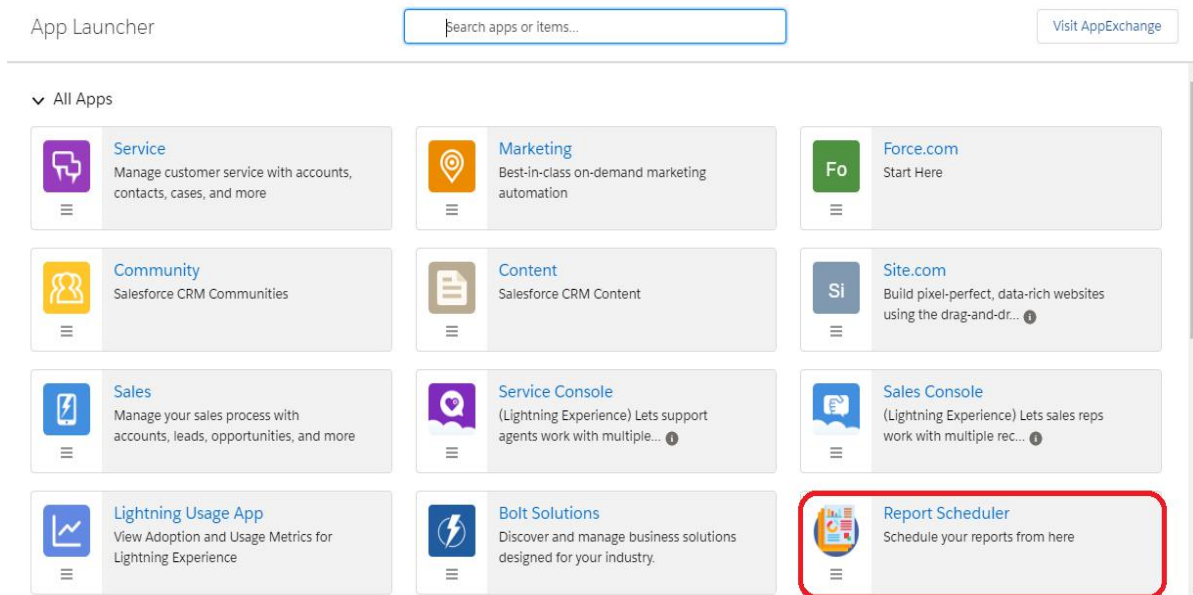
2. Flow Diagram



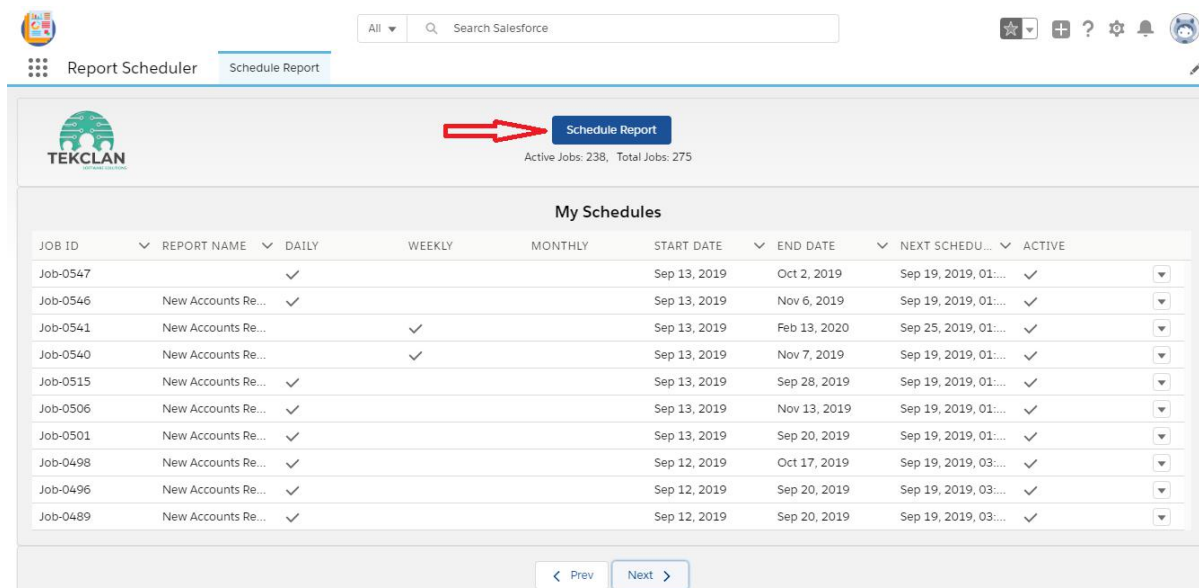
3. Configuration Instructions

3.1 Create Job Schedule

1. In Salesforce, ensure that you are in Lightning, not Classic.
2. Click the App Launcher and Click the Report Scheduler App.



3. Click on the Schedule Report tab
4. Click Schedule report

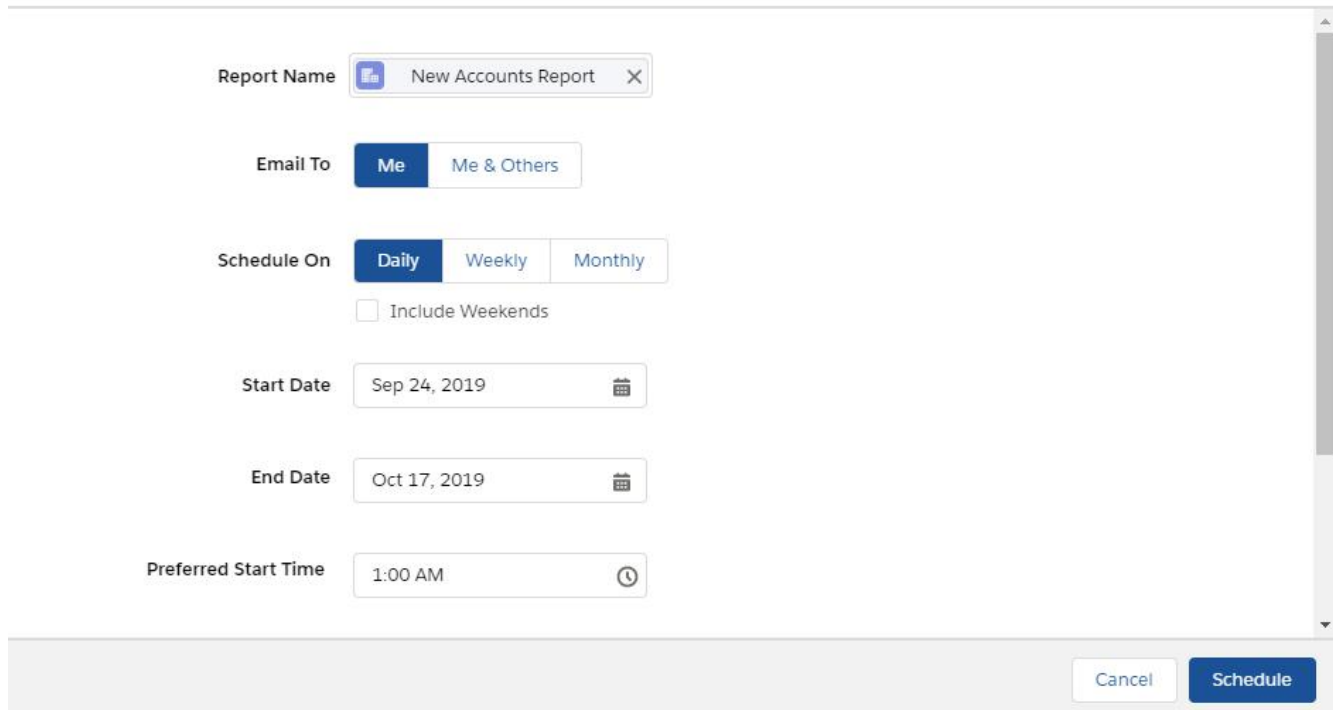


❖Note - you can Schedule any frequency(Daily/Weekly/Monthly) you'd like. The following steps are an example.

3.1.1 Steps to create Job Schedule

1. In Report name, Please Select Report.
2. In Email To, Me defaults to logged in user and Me&Others allows the user to select multiple recipients including external users.
3. In Schedule On, You would be able to give the frequency in which you want to receive the report in the email.
4. In Start Date, please select the start date(Start date should be today or greater than today).
5. In End Date, please select the end date(End date should be greater than start date).
6. In Preferred Time, please select the time on which you would like to receive the report.
7. The notes entered in the instructions/notes field would be sent to the recipients in the email content.
8. Once you are done with the selections, click on Schedule to finish the process of Scheduling.

Create Job Schedule



The screenshot shows a web form titled "Create Job Schedule". It contains several input fields and buttons:

- Report Name:** A dropdown menu with "New Accounts Report" selected and a close button (X).
- Email To:** Two buttons: "Me" (selected) and "Me & Others".
- Schedule On:** Three buttons: "Daily" (selected), "Weekly", and "Monthly". Below these is a checkbox labeled "Include Weekends" which is currently unchecked.
- Start Date:** A text input field showing "Sep 24, 2019" with a calendar icon to its right.
- End Date:** A text input field showing "Oct 17, 2019" with a calendar icon to its right.
- Preferred Start Time:** A text input field showing "1:00 AM" with a clock icon to its right.
- Buttons:** At the bottom right, there are two buttons: "Cancel" and "Schedule".

Now you can see your schedule job record under my schedules



[Schedule Report](#)
Active Jobs: 238, Total Jobs: 275

My Schedules									
JOB ID	REPORT NAME	DAILY	WEEKLY	MONTHLY	START DATE	END DATE	NEXT SCHEDU...	ACTIVE	
Job-0691	Job Schedulers Re...		✓		Sep 18, 2019	Nov 6, 2019	Sep 18, 2019, 09:...	✓	▼
Job-0690	Job Schedulers Re...	✓			Sep 18, 2019	Dec 4, 2019	Sep 18, 2019, 07:...	✓	▼
Job-0679	New Accounts Re...	✓			Sep 18, 2019	Sep 30, 2019	Sep 19, 2019, 11:...	✓	▼
Job-0678	New Accounts Re...	✓			Sep 18, 2019	Sep 21, 2019	Sep 19, 2019, 01:...	✓	▼
Job-0675	New Accounts Re...	✓			Sep 17, 2019	Sep 30, 2019	Sep 18, 2019, 10:...	✓	▼
Job-0674	Job Schedulers Re...	✓			Sep 17, 2019	Sep 30, 2019	Sep 18, 2019, 08:...	✓	▼
Job-0673	New Leads Report	✓			Sep 17, 2019	Sep 28, 2019	Sep 18, 2019, 08:...	✓	▼
Job-0672	New Accounts Re...	✓			Sep 17, 2019	Sep 30, 2019	Sep 18, 2019, 08:...	✓	▼
Job-0670	New Accounts Re...	✓			Sep 17, 2019	Sep 28, 2019	Sep 18, 2019, 06:...	✓	▼
Job-0669	Job Schedulers Re...	✓			Sep 17, 2019	Nov 1, 2019	Sep 18, 2019, 05:...	✓	▼

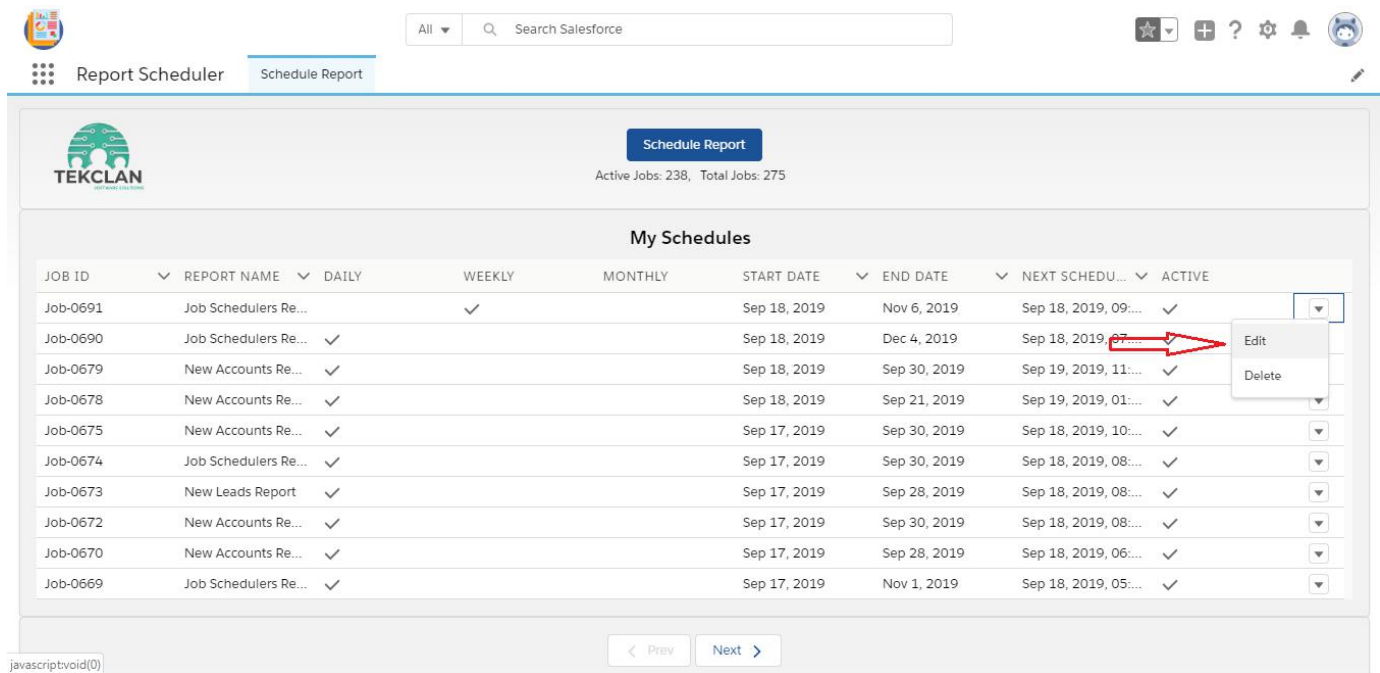
[< Prev](#)
[Next >](#)

Woohoo..... now your job created successfully and as per your Schedule time you will receive report in your mail.

3.2 Edit Job Schedule

3.2.1 Steps to Edit Job Schedule

1. Click on Edit.



Report Scheduler Schedule Report

Active Jobs: 238, Total Jobs: 275

My Schedules

JOB ID	REPORT NAME	DAILY	WEEKLY	MONTHLY	START DATE	END DATE	NEXT SCHEDU...	ACTIVE	
Job-0691	Job Schedulers Re...		✓		Sep 18, 2019	Nov 6, 2019	Sep 18, 2019, 09:...	✓	▼
Job-0690	Job Schedulers Re...	✓			Sep 18, 2019	Dec 4, 2019	Sep 18, 2019, 07:...	✓	▼
Job-0679	New Accounts Re...	✓			Sep 18, 2019	Sep 30, 2019	Sep 19, 2019, 11:...	✓	▼
Job-0678	New Accounts Re...	✓			Sep 18, 2019	Sep 21, 2019	Sep 19, 2019, 01:...	✓	▼
Job-0675	New Accounts Re...	✓			Sep 17, 2019	Sep 30, 2019	Sep 18, 2019, 10:...	✓	▼
Job-0674	Job Schedulers Re...	✓			Sep 17, 2019	Sep 30, 2019	Sep 18, 2019, 08:...	✓	▼
Job-0673	New Leads Report	✓			Sep 17, 2019	Sep 28, 2019	Sep 18, 2019, 08:...	✓	▼
Job-0672	New Accounts Re...	✓			Sep 17, 2019	Sep 30, 2019	Sep 18, 2019, 08:...	✓	▼
Job-0670	New Accounts Re...	✓			Sep 17, 2019	Sep 28, 2019	Sep 18, 2019, 06:...	✓	▼
Job-0669	Job Schedulers Re...	✓			Sep 17, 2019	Nov 1, 2019	Sep 18, 2019, 05:...	✓	▼

javascript:void(0)

< Prev Next >

2. Please do the changes accordingly(like daily to weekly or add additional users etc...).

Edit Job Schedule

Report Name

Email To

Schedule On

Recurs every week on

Start Date

End Date

Preferred Start Time

3. Click on Save to update the schedule record as per your new requirement.

3.3 Delete Job Schedule

3.3.1 Steps to Delete Job Schedule

1. Click on action icon and select Delete.



Report Scheduler

Schedule Report

All

Search Salesforce










Schedule Report

Active Jobs: 238, Total Jobs: 275

My Schedules

JOB ID	REPORT NAME	DAILY	WEEKLY	MONTHLY	START DATE	END DATE	NEXT SCHEDU...	ACTIVE	
Job-0691	Job Schedulers Re...		✓		Sep 18, 2019	Nov 6, 2019	Sep 18, 2019, 09:...	✓	
Job-0690	Job Schedulers Re...	✓			Sep 18, 2019	Dec 4, 2019	Sep 18, 2019, 07:...	✓	Edit Delete
Job-0679	New Accounts Re...	✓			Sep 18, 2019	Sep 30, 2019	Sep 19, 2019, 11:...	✓	
Job-0678	New Accounts Re...	✓			Sep 18, 2019	Sep 21, 2019	Sep 19, 2019, 01:...	✓	
Job-0675	New Accounts Re...	✓			Sep 17, 2019	Sep 30, 2019	Sep 18, 2019, 10:...	✓	
Job-0674	Job Schedulers Re...	✓			Sep 17, 2019	Sep 30, 2019	Sep 18, 2019, 08:...	✓	
Job-0673	New Leads Report	✓			Sep 17, 2019	Sep 28, 2019	Sep 18, 2019, 08:...	✓	
Job-0672	New Accounts Re...	✓			Sep 17, 2019	Sep 30, 2019	Sep 18, 2019, 08:...	✓	
Job-0670	New Accounts Re...	✓			Sep 17, 2019	Sep 28, 2019	Sep 18, 2019, 06:...	✓	
Job-0669	Job Schedulers Re...	✓			Sep 17, 2019	Nov 1, 2019	Sep 18, 2019, 05:...	✓	

< Prev

Next >

2. User would be prompted with the confirmation box. Clicking on Delete in the confirmation box would delete the scheduled record.

