Salesforce
Upcoming Offbooks Report and Scheduling

Saving and Editing the Report

- Open template report: Offbooks w/in 5 days Seattle
- Click the drop-down on top right next to Edit and click 'Save As'
- Update the name to include *your market's name* and click Save. This saves a copy of the report in the same folder so it can be edited.



- Click Edit
- Click Filters tab
- Click filter 'Case Owner contains Seattle'
- Change Seattle to *your market's name*
- Click Apply
- Click Save & Run



Subscribing to the Report (Scheduled Email Delivery)

- Click the drop-down next to Edit and click 'Subscribe'
- Select Daily and 11:00 am
- Optional: if any additional recipients need to be added, click Edit Recipients, start typing their name, select their name, and click Add
- Click Save

NOTE: Do not change the time period, always use within 5 days. Shows open cases from "today" and within the next 5 days.