



Merfantz Technologies Pvt. Ltd

www.merfantz.com



Merfantz Technologies Pvt. Ltd - Confidential



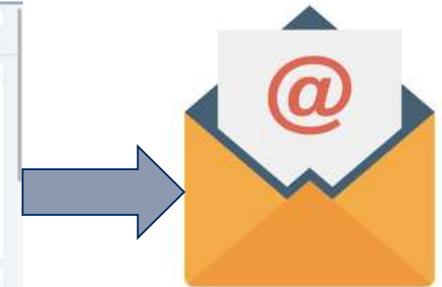
Schedule a report to specific users

STORY:

Our customer is one of the leading service provider in USA, using Salesforce CRM software to organize all of their business contacts, products, stocks and their leads.

They want to improve the relationship with their customers by sending a scheduled report to their personal email address on a weekly or monthly basis.

Process Flow



The Challenge:

- 👉 Our Customer wants to send the standard report to their customer on a weekly/monthly basis automatically without any manual intervention.
- 👉 Salesforce has a limitation to send the standard report only to the licensed user but not to the contacts which does not belong to a licensed user.
- 👉 Due to the limitation with Salesforce standard feature, our customer has to generate the report and send it to their own email id and then they have to forward the same to their customer manually. This is a time consuming activity and lots of manual effort is required
- 👉 Creating a Chatter free account is also not possible for all the contacts

Schedule a report to specific users

The Solution:

- 👤 There are a couple of apps for sending report to specific email address on the AppExchange. But those are paid and expensive
- 👤 As solution, we have designed a Visualforce page to select the contact and with different scheduling options.
- 👤 A process builder has been created which runs behind the screen and send this report to their contacts as per the schedule
- 👤 Our customer was provided multiple options to schedule a standard report with a specific email address
 - 👤 A standard report against different objects
 - 👤 Report can be scheduled weekly/Bi-weekly/ monthly
 - 👤 Report can be scheduled at particular date and time
 - 👤 Report can be sent to any specific email address
 - 👤 There is no limitation with number of email address
- 👤 Having this feature implemented, customer don't need to spend lot of time in forwarding the report to the customer. It saved a lot of admin time and manual effort
- 👤 Customer no need to go for either a paid app or chatter free account to send this report.