

# Email Broadcast

- [Overview](#)
- [Recipients](#)
- [Subject](#)
- [Body](#)
- [File Type](#)
- [Filters](#)
  - [Source Filters](#)
- [Delivery Rule](#)
- [Schedule](#)
- [Save](#)

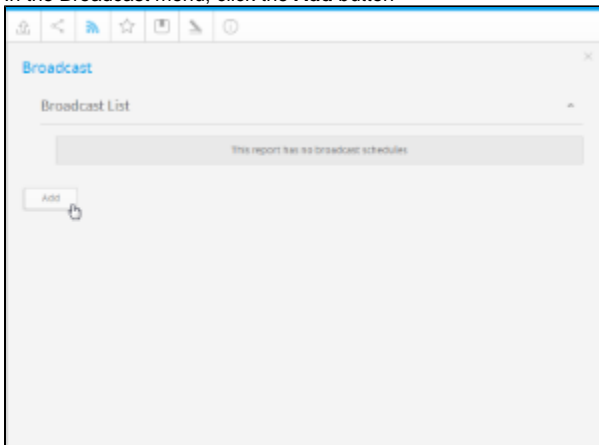
## Overview

[top](#)

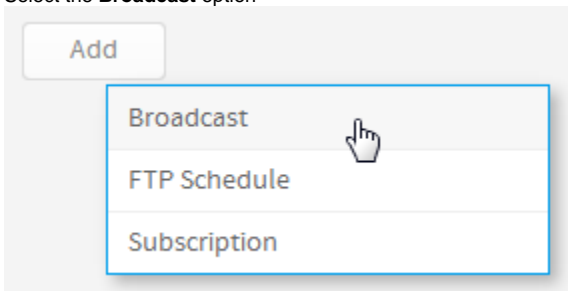
1. Ensure your report is Active (not in Draft Mode)
2. Click on the **Broadcast** button in the main navigation menu



3. In the Broadcast menu, click the **Add** button



4. Select the **Broadcast** option



5. The Broadcast window will open, providing you with the following options:

## Recipients

[top](#)

A Broadcast email can only be sent if recipients have been defined. One or more recipients can be selected for a Broadcast.

1. Click on the **+ Add Recipients** link
2. From here you are able to search through Yellowfin Users, Groups, and Reports, or type in an external email address (external users require a multicast licence)

<b>User</b>	A person that is a registered user of Yellowfin.
<b>Group</b>	A group of users that have been setup within Yellowfin. This option allows you to send a report to multiple users at once.
<b>Email Address</b>	You can insert an external email address so that the report can be sent to external users. <b>Note:</b> this function depends on your licence options.
<b>Report</b>	<p>A report can be created to list email addresses for broadcasting. The email addresses don't have to belong to Yellowfin users. Other columns in this report can be linked to the main report as filters, resulting in a uniquely filtered report sent to each email address.</p> <p>Select the report you wish to use. <b>Note:</b> the column that contains the email addresses in this report must be formatted as 'Email' to be displayed in the list. To do this:</p> <ol style="list-style-type: none"><li>a. Select the column in the Columns format menu.</li><li>b. Open the <b>Display</b> menu for the column</li><li>c. Set the <b>Format</b> option to be <b>Email</b></li></ol>

3. Once added, your recipients will be listed in the box (see below)

System Administrator x

Admin Users x

+ Add Recipients

☐ Advanced

## Subject

[top](#)

Enter the text you wish to use for the Subject line in your email

Monthly Invoicing Figures

## Body

[top](#)

Enter the text you wish to use for the Body of your email

Please review last month's figures and respond RE: your department.

## File Type

[top](#)

Select the format you wish the report to be sent as, from the list of; HTML, PDF, CSV, DOC, XLS, RTF, TXT, and List To Report

HTML

HTML

PDF

CSV

DOC

XLS

RTF

TXT

Link To Report

## Filters

[top](#)

If your report contains filters you will have the option to select which of these are applied to the Broadcast Report. The options include:

1. Current Filter Values
2. Default Filter Values
3. Saved Filter Set Values (there will be a list of available sets displayed)

This report has User Prompt filters. What filter values would you like to use for the broadcast?

Current Filter Values

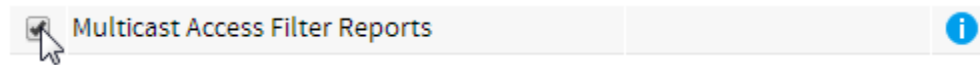
Current Filter Values

Default Filter Values

## Source Filters

If your report uses Source Filters, the Broadcast Report will also be filtered by the Source Filter, as well as whatever filters were defined above. If the report has been sent to an external email address, rather than a defined Yellowfin user, the recipient will inherit the Source Filter from the user who defined the Broadcast.

**Note:** in order for a user to Broadcast a Source Filter report to recipients not defined in the source filter, they will require the following role permission to be enabled.



## Delivery Rule

[top](#)

A Delivery Rule is used for exception reporting. If you wish to send a report only if it meets certain criteria (for example: Revenue is less than 100,000) then you will need to add a rule.

1. Change the **Always Send** drop down list to **Only if Delivery Rule met**
2. Click on the **Click here to add rule** link
3. You will now have the choice of building a rule based on:
  - a. If one or more rows match the rule (e.g. is there a transaction less than \$1000) OR
  - b. If the totals for the report match the rule (e.g. are the total sales less than \$100000)
4. Select the field you wish to apply the condition on, click **Add**, and apply your condition. Click **Update** to save it. You can add multiple conditions here if required.
5. Click **Save & Close** to apply your condition(s)
6. Your rule will now be displayed on the Broadcast window



## Schedule

[top](#)

The last step is to define the schedule for your Broadcast

1. Select the frequency.  
Depending on the option selected here, you may be required to provide further details. For example, if Fortnightly is selected, you will be prompted to select either the first or second week of the fortnight to send in, as well as the day of the week.
2. Apply Advanced Settings (if required)  
Sometimes you may find you need to set the Time Zone, and local time for delivery. This can be accomplished by selecting the **Advanced** check box and defining the time.

A screenshot of the Schedule configuration interface. It shows a dropdown menu set to "Monthly" with a blue checkmark icon. To the right, the task is displayed as "Task will run every month, on the 1st day of the month". Below this, there is a "Day:" field with the value "1". There is a checked checkbox for "Advanced". Under "Time Zone:", there are three dropdown menus: "Australia", "Sydney", and "5 pm". Under "Local Run Time:", there is a dropdown menu with the value ":30".

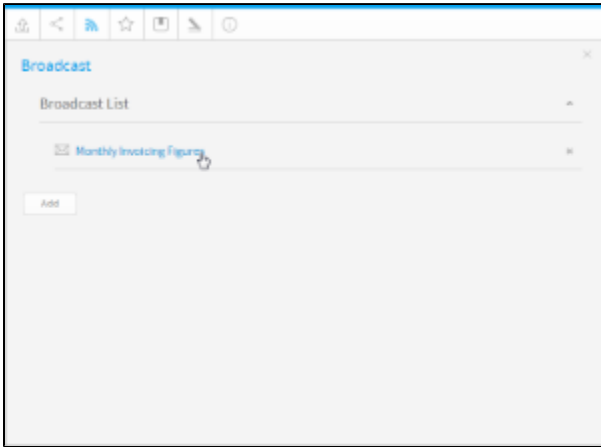
## Save

[top](#)

Click on the Save button to complete the Broadcast set up.



You will now be able to view your broadcast through the main menu.



[top](#)