

Email

Overview

[top](#)

As a user of Yellowfin you may have permissions to send reports via email to other registered users or external parties.

Note: You will only be able to email a report once it is active. Draft reports cannot be emailed. Save your report prior to sending.

1. To distribute a report click the **Share** button on the active report menu. This will open the Share window from which you can select to either Distribute, Email, or Embed the report.



2. Click on the **Email** option.

The 'Share' dialog box has a blue header with a close button. On the left, there are four radio button options: 'Distribute', 'Email' (which is selected and has a mouse cursor clicking it), 'Embed', and 'Link'. Below these is a 'Share Settings' link. On the right, there is a text input field for 'Add Recipients' containing 'Athlete Demographic Sprea...', a larger text area for 'Additional Message (Optional)', a row of icons for different file formats (PDF, DOCX, etc.), and a 'Share using' dropdown menu currently set to 'Current Values'. At the bottom is a large blue 'Submit' button.

3. You can now select the required Recipients.
 - a. From here you are able to search through Yellowfin Users and Groups.
 - b. Select the desired recipients. Once added, your recipients will be listed in the box
4. Select the format you wish the report to be sent as, from the list of; **PDF, DOCX, Link to Report, HTML, XLSX**.
5. Next you are given the option to provide a message for the email.

6. Click the **Submit** button to send the email


Share

☐ Distribute

☒ Email

☐ Embed






☐ Link

 Share Settings

Captain SysAdmin

Athlete Demographic Sprea

Please review this design and respond.



Share using

Current Values

Submit

[top](#)