

# Share, Email, and Schedule an Export

Our export\* sharing features allow you to share results with your customers, clients, colleagues and stakeholders as soon as responses start rolling in!

\*These sharing options refer to the [CSV/Excel Export](#), [Bulk File Export](#), and [SPSS](#) export options. The [Bulk PDF Export](#) is not currently compatible with these sharing options.

You can also set up a schedule for an export to run on a one-off basis, daily, weekly, or monthly and have it sent to an email address (up to 5) of your choice! This means no more scrambling on the first day of the month for last month's data, it will be packaged up and sent right to you!

To read about our Report sharing options, click [here](#).

## Share your Export

After creating your Export, click **Customize Report** and navigate to the **Share** tab.

- You will immediately have a **Distribution link**\* available for sharing. You can copy this distribution link and email it to project stakeholders or link to it on your website.
  - For exports, accessing the distribution link will download the export in the browser.
  - You have the option to **Customize this link** where you can choose between a default, branded subdomain or [private domain](#) link. Learn how to make sure that all report links use your [private domain by default](#) (requires Account Administrator privileges).
- You also have the option to **Password protect access to this report** for added security.

*\* The distribution link does not automatically update with new survey responses. It will include all responses up to the date that the export was created or last refreshed in SurveyGizmo. In order to update the distribution link, you will need to refresh the export in SurveyGizmo or utilize the [realtime reporting capabilities](#).*

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**Edit Report Settings**

General Settings Filter **Share**

### Publish to the Web

Distribution link

https://data. .com/reportsview/?key=

[Customize this link](#)

Password protect access to this report

Password

surveygizmo

## Email your Export

On the **Share** tab you also have the option to set up a scheduled delivery (via email) of your export. With a scheduled delivery, the export will be automatically refreshed before sending. Follow these steps to schedule and email your export.

- Enter up to 5 email addresses in the **Send To** field. These will be the recipients of your export. Please remember to use commas (no spaces) between each email address.
- Customize the **From**, **Subject**, and **Message** fields. While these are not required, we recommend personalizing these fields to help the report recipients identify who the export is coming from and what the export is referring to.

**Edit Report Settings**

General Settings Filter **Share**

### Scheduled Delivery

Send To

jane.smith@company.net

Maximum of 5 email addresses (separated by commas)

From

SurveyGizmo

Subject

Survey Results

Message

Access the export link to view the results of your survey|

# Schedule your Export

Once you determine who you want to email your export to, the next step is to specify the frequency with which the export will be emailed.

- The **One-time delivery** option lets you specify a date and time for the export to be sent out. When setting up a one-time delivery of an export via email, the date and time specification will be:
  - EST/EDT (GMT -5/GMT -4) for **US** accounts
  - GMT (UTC) for **EU** and **CA** accounts.
- The **Recurring delivery** option allows you to select your desired email delivery schedule so that you can receive your scheduled exports run at specified increments. These recurring deliveries can be set to re-run 30, 60, 90 or 120 times before needing to be rescheduled. You will be notified via email 15 days before your last run that you need to reschedule the recurring deliveries.
- **No Schedule** is selected by default. If you decide that you no longer want to schedule your export you can select this option.

Note: For exports, the link in the email will download the export in the recipients' browser.

Next Run: Not Scheduled

No Schedule

One-time delivery (EST)

Month ▾ Day ▾ Year ▾ at: 1 ▾ 00 ▾ AM ▾

Recurring delivery

First of the month ▾ Re-run 60 times ▾

## When do these scheduled email options actually send?

When you select and save one of the recurring send options your report/exports will be queued with all other scheduled reports/export. Below are the details for when each queue *begins* sending. It is important to note that the size of the queue will affect when your email is actually sent.

- **Daily** - This queue of reports begins sending at 7:00 am ET.
- **Weekly** - The queues for all weekly schedule options begin sending at 7:30 am ET.
- **First, Middle, and End of month** - The queues for all monthly options begin sending at 7:30am ET.

## Only Send a Scheduled Export if There is New Data

You may find that you only want an export to be emailed if there is new data to report on. No worries! You can make sure this happens by checking the following setting.

Next Run: Not Scheduled

No Schedule  
 One-time delivery (EST)  
 Month ▾ Day ▾ Year ▾ at: 1 ▾ 00 ▾ AM ▾

Recurring delivery  
 First of the month ▾ Re-run 60 times ▾

Only send scheduled report if there is new data

## Remove a schedule

Scheduled exports will continue to run based on the number of times you've selected. To remove a schedule from an export and halt further sends, find the survey and export in question, click **Customize Report** and go to the **Share** tab. Scroll to the Scheduled Delivery section, select **No Schedule** and **Save**.

## Change the File Type for the Distribution Link

By default, the file type that will be downloaded via the distribution link or emailed link will be .csv. This works generally for most users as it will open as a spreadsheet in Excel, Numbers or whatever spreadsheet program you use. However, if you require a different file type, we have a [URL variable trick](#) that you can manually add to the end of the distribution link like so:

<http://app.surveygizmo.com/reportsview/?key=160589-5041021-0b1be00c934ff1f6663e9be115c99ebd&mode=xls>

Note: This will need to be done manually by the link recipient. This means copying and pasting the link into the URL bar of their browser and then entering &mode=xls before clicking enter.

## Share a Hard Copy of your Export

You can download a copy of your export by clicking on one of the download options after running your export in SurveyGizmo.

Run Report This export was last run on Sep 10, 2018 at 1:29 pm **NEW!** Date and times are set to America/Denver timezone, based on your Account Preference.

### Export Complete

- Run on: Sep 10, 2018 1:29 pm
- Responses: 24

[Download Export to CSV](#)  
[Start Excel export](#)

Tip: In general, CSV and XLS will open in Excel. Depending on your computer settings, CSV is best for databases and importing into other programs. XLS is best for working in Excel.