

How do I attach a survey PDF to an alert or notification?

The Alerts & Notifications feature allows you to construct alerts and send customized email communications to one or more recipients. To learn about the **Alerts & Notifications** feature, refer to [FAQ: ALERTS AND NOTIFICATIONS](#). These alerts and notifications can be configured to include a PDF version of the survey to the email communication.

This FAQ will explain how to attach a PDF version of the survey to an email alert or notification.


To create the survey PDF:

1. Within the 'Designer', create a **File Upload** field in the project. This field is where the PDF of the survey will be stored for the record. It can be located on any form.

Field Type: File Upload (for users to upload files) ▼

Pro Tip: If the File Upload Field is in the same form as the survey, you can hide the field using the @HIDDEN action tag. To learn about the **Action Tags** feature, refer to [FAQ: ACTION TAGS](#).

2. Go to 'Survey Settings' to enable a PDF of the survey to be saved to the file upload field that you created in Step 1.

 **Save a PDF of completed survey response to a File Upload field**
A PDF copy of the survey response will be immediately stored in the field selected on the right whenever a participant completes this survey.

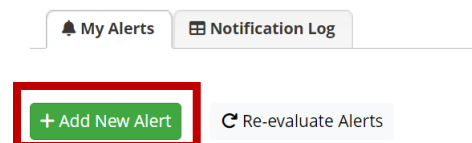
Baseline ▼
file_upload "File Upload" ▼

Store the translated version of the PDF (if using Multi-language Management)

Choose a File Upload field from the drop-down above to enable this feature. Tip: If desired, the field may exist on the survey instrument that is triggering it, in which the field can be hidden on the survey page using the action tag @HIDDEN-SURVEY. [Learn more](#)

To attach the survey PDF to an alert or notification:

1. Go to 'Alerts & Notifications' in the left navigation menu and create a new alert.



2. Follow the instructions to configure the settings in Step 1-3 to create a new alert and select '**Add Attachments**' at the end of Step 3.



Frequently Asked Question (FAQ) Library

3. In the **'File upload fields'** dropdown, select the file upload field to be included as an attachment and click 'Save'.
4. A PDF of the survey will be attached to your email notification.

Message Attachments (Max file size: 10MB)

File Upload fields:
You may utilize files attached to records that have been uploaded into File Upload or Signature fields.

-- and/or --

Attachment #1: No file chosen

[+ Add another attachment](#)
