

# DISTRIBUTING A SURVEY WITH CUSTOM LINKS USING THE QUALTRICS MAILER

## April 2020

This document shows how to build a contact list and then distribute an active (published) survey in Qualtrics to members of the list using the Qualtrics Mailer. With this method, each individual receives a custom link to the survey (automatically generated by the Mailer) in the invitation. This allows for 1) tracking of which individuals completed a survey in response to the initial invitation and 2) the delivery of follow-up invitations just to non-respondents.

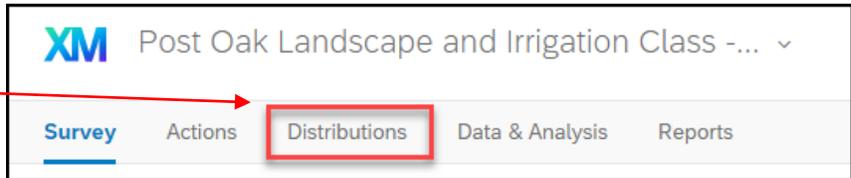
### When this Method is Appropriate

This method is appropriate for distributing a survey to a large number of participants after a program, in situations where knowing which individuals have (or have not) responded is needed, or for studies in which several follow-up survey invitations will be sent out to non-respondents to maximize response rate.

### Start the Process

- From the main dashboard, click on the published survey you want to distribute (Post Oak Landscape and Irrigation Class Survey in this case).

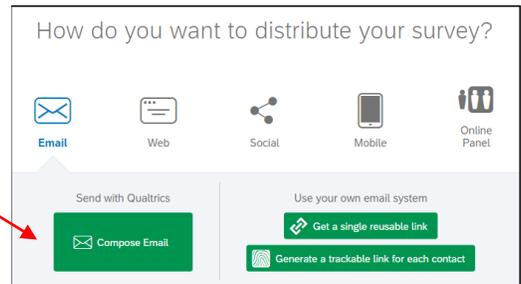
- Once in the survey, click on “Distributions.”



- This brings up the main distribution menu. Click on “Emails” and then on “Compose Email” to access the Qualtrics Mailer.



**Note:** If you click on “Distribution” for an unpublished survey, the interface looks a little different (see right) but you would still click on “Compose Email” to access the Qualtrics Mailer.



## Compose Email

- Below is the “Compose Email” interface with survey links included. Here is an overview of the interface:

**To:** use this to select or create a contact list.

**From:** There is no need to change these prefilled fields unless you are sending on behalf of someone else. That case you can change “From Name” and “Rely to Email” accordingly.

**When:** The default setting is “Send in 1 hour.” Use the pull-down to see other options.

**Message:** Add a custom message inviting participants to complete the survey. The survey link (custom for each recipient) is already included.

**Send Preview Email:** Be sure to use this to send a test email to yourself (or someone else) to ensure all is correct with the message and link before officially launching the survey to all members of the contact list.

The screenshot shows the 'Compose Email' interface. It has a 'To:' field with a 'Select Contacts' dropdown. The 'From:' section includes 'From Address' (surveys@ag.tamu.edu), 'From Name' (Paul Pope), and 'Reply-To Email' (ppope@tamu.edu). The 'When:' field is set to 'Send in 1 hour'. The 'Subject:' field contains 'Subject'. The 'Message:' field is a rich text editor with a toolbar and contains the following text: 'Follow this link to the Survey: \$!{/SurveyLink?d=Take the Survey}', 'Or copy and paste the URL below into your internet browser: \$!{/SurveyURL}', and 'Follow the link to opt out of future emails: \$!{/OptOutLink?d=Click here to unsubscribe}'. At the bottom, there are buttons for 'Show Advanced Options', 'Cancel', 'Send Preview Email', and 'Send in 1 hour'.

## Contact List

- Click on “Select Contacts” to start the process creating a contact list (interface seen here).
- Enter a name for the contact list.
- Copy your email list from Excel. The only required field is Email but you can also include First Name and Last Name.
- Click on the green + to add other fields in your Excel file that you want to include with the contact list. Typically these are known participant background variables such as gender, race/ethnicity, years of service (employee survey), etc. that are automatically attached to each respondent’s survey data record. This avoids having to ask for the information on the survey or link to another database later to gain that information.

The screenshot shows the 'Create Contact List' interface. It has a 'Name' field with the text 'Post Oak Landscape and Irrigation Class Contact List'. Below is a table with the following columns: 'Email', 'First Name', 'Last Name', 'External Data Reference', and 'Language'. A green '+' button is located in the top right corner of the table. A blue callout box points to this button with the text: 'Do NOT click on “+ Create” until your list is ready (see next page)'. At the bottom of the interface, there are 'Cancel' and '+ Create' buttons.

- In this example, the contact list in Excel includes email, first name, and last name so copy all three fields from Excel. The fields need to be the same and in the order as shown below. To paste, click on the first cell under “Email.” Then right click, and select “Paste as plain text.”

**Note** this entire process is valid for contact list of 200 or less. For larger lists, use the Contact List option at the top right instead (shown later).

**Create Contact List**

Name  
Post Oak Landscape and Irrigation Class Contact List

Email	First Name	Last Name	External Data Reference	Language	Gender

Viewing rows 1 - 10 of 10

For lists over (200) contacts. Please go to the Contacts section to create your contact list.

Cancel **+ Create**

- This populates the three fields. If all looks correct, click on + Create.

**Create Contact List**

Name  
Post Oak Landscape and Irrigation Class Contact List

Email	First Name	Last Name	External Data Reference	Language	Gender
123seal@gm	Khaled	chou			
1544buddy@	Don	Hum			
1941breeder	William	Bree			
a.lamantia.r	Angela	LaM			
a_norris@tar	Aaron	Norri			
aared18@tar	Anahi	Arrei			
aartibey@gm	Ashley	artib			
abalderete1	Alexandra	Alde			

Viewing rows 1 - 10 of 10

For lists over (200) contacts. Please go to the Contacts section to create your contact list.

Cancel **+ Create**

## Message

- This is an example of a custom a survey invitation.
- This is the link to the survey provided automatically by Qualtrics.

Compose Email

To: Post Oak Landscape and Irrigation Class Contact List 8 Contacts

From: surveys@ag.tamu.edu From Name: Paul Pope Reply-To Email: ppope@tamu.edu

When: Send in 1 day

Subject: Follow-up to Post Oak Landscape and Irrigation Class on

Message: Load Message Save As

Dear Program Participant,

Thank you for attending the program! Your views on the quality and effectiveness of Extension programs is very important. Please take a moment to complete the online survey linked below. Your responses will help us improve and better meet your needs in the future.

Thank you,

Joe Agent, Lone Star County

Follow this link to the Survey:  
\${!://SurveyLink?d=Take the Survey}

Or copy and paste the URL below into your internet browser:  
\${!://SurveyURL}

Follow the link to opt out of future emails:  
\${!://OptOutLink?d=Click here to unsubscribe}

Show Advanced Options Cancel Send Preview Email Send in 1 day

text for

- Alternatively, a previously used message can be loaded (and probably modified) as well by clicking on "Load Message."

Load Message

My Library: Paul Pope

Global Library: Qualtrics Library

Organization Library: Texas A&M University College of Agriculture and Life Sciences - Extension and Research Site

Use Fixed Text

\${!://SurveyURL}

Follow the link to opt out of future emails:  
\${!://OptOutLink?d=Click here to unsubscribe}

2019 BCSC Survey Initial Invitation

2nd Test of QWL

First Reminder for 2019 BCSC

katy test

Paul's Test Message

Test Note 3

Test Note 4

Totally New

- This is an invitation to a Beef Cattle Short Course follow-up survey sent to +1,300 program participants. Note the survey invitation includes script for bringing in the first name of the invitee in salutation (i.e., Dear Richard,). Personalizing an invitation in this way can help increase response rate. Click on “insert piped text,” then “Contact Fields”, then “First Name.”

The screenshot shows an email editor interface for a survey invitation. At the top left, the title is "2019 BCSC Survey Initial Invit...". The editor includes a toolbar with options for bold, italic, underline, and font size. A logo for the "65th Annual Texas A&M Beef Cattle Short Course" is displayed on the left. The salutation reads "Dear \${m://FirstName},". A dropdown menu titled "Pipe text from a..." is open, showing a list of fields including "Contacts Field" and "Recipient First Name", which are highlighted. The main body of the email contains the following text:

Thank you for your participation in the 2019 Texas A&M Beef Cattle Short Course. The goal of the short course each year is to provide the most cutting-edge information needed by beef cattle producers.

Please take a few minutes to tell us about your experience with this activity using the survey link below. Your views on the quality and effectiveness of Extension programs are extremely important. Your answers will help us better meet your needs. For best readability, it is recommended you take the survey using a desktop, laptop, or tablet rather than a smart phone.

**If you completed a paper version of this survey while at the 2019 Beef Cattle Short Course**, please disregard this email and any of the follow-up reminders that you may receive. We appreciate all of the valuable information you provide us. Thank you!

**Follow this link to the Survey:**  
 \${l://SurveyLink?d=Take the Survey}

Or copy and paste the URL below into your internet browser:  
 \${l://SurveyURL}

Follow the link to opt out of future emails:  
 \${l://OptOutLink?d=Click here to unsubscribe}

- Note the text to encourage respondents to complete the survey using a larger screen instead of a smart phone. Longer or more complex surveys that use matrix or retrospective post questions can be difficult to complete on the small screen of a smart phone.

## Contact Lists Over 200

- Click on the Contact option (top right from main dashboard) for contact lists over 200 entries.



- This brings up a dialogue. Enter a name for the new contact list. Click "Next."

- To bring in an existing list you have in another file format (the most likely scenario), click on "Browse" as "Import from a file" is the default.

**Note:** If your list is an Excel file (.xlsx or .xls) then be sure to save the file to .csv format at this point. Excel format is not supported as a file type to import.

Point to the .csv file containing the contact list

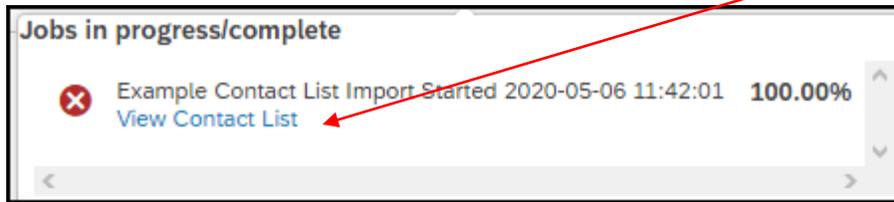
- After import of the list, Qualtrics displays a sample of the contacts for your inspection. Review to make sure the list imported correctly.

correct, click on "Add Contacts."

Fields	First Contact	Next Contact	Third Contact
LastName	choukeir	Humphries	Breeding
FirstName	Khaled	Don	William
Email	23seal@gm...	1544buddy@g...	2341breeder@gm...

If

- Qualtrics creates and downloads the new contact list. When the job is 100% complete, click on “View Contact List” to renew it and see if there are any duplicate email addresses.



- If Qualtrics finds any duplicate emails (as seen below), it provides a list and lets you decide on a case-by-case basis whether to consolidate the duplicates (delete one of them).

Email	Duplicates	
chatcher72@gm	2	<a href="#">Consolidate Duplicates</a>
christie_am2004	2	<a href="#">Consolidate Duplicates</a>
corn.patricia@y	2	<a href="#">Consolidate Duplicates</a>

Once duplicates, if any, are resolved successfully, your new contact list is ready to use. Now you can point to this new list in the survey invitation you compose (TO: field).

- Click on your account name if you want to return to the listing of all your contact sets (see below).



All Folders		
2015 OWL Survey <small>Last Modified: Sep 20, 2015 11:42 AM</small>	Members 192	Type Mailing List
2019 BCSC <small>Last Modified: Aug 12, 2019 1:22 PM</small>	Members 1,310	Type Mailing List
2020 BCSC Contact List <small>Last Modified: May 10, 2020 11:30 AM</small>	Members 1,310	Type Mailing List
Contact List for Qualtrics Training <small>Last Modified: Apr 01, 2020 12:00 PM</small>	Members 0	Type Mailing List
Healthy Livers and Healthy Waters <small>Last Modified: May 14, 2019 2:24 PM</small>	Members 90	Type Mailing List

## Launching the Initial Survey Invitation

- Your contact list is set now – created through the Mailer (for 200 contacts or less) or through the Contacts menu option (for 200 or more contacts).
- Now set up all other parts of the invitation (Subject, custom salutation, custom message, when to send, etc).

Compose Email

To: Post Oak Landscape and Irrigation Class Contact List 8 Contacts

From: surveys@ag.tamu.edu From Name: Paul Pope Reply-To Email: ppope@tamu.edu

When: Send in 1 day

Subject: Follow-up to Post Oak Landscape and Irrigation Class on

Message: Load Message Save As

Dear Program Participant,

Thank you for attending the program! Your views on the quality and effectiveness of Extension programs is very important. Please take a moment to complete the online survey linked below. Your responses will help us improve and better meet your needs in the future.

Thank you,

Joe Agent, Lone Star County

Follow this link to the Survey:  
\${url://SurveyLink?id=Take the Survey}

Or copy and paste the URL below into your internet browser:  
\${url://SurveyURL}

Follow the link to opt out of future emails:  
\${url://OptOutLink?id=Click here to unsubscribe}

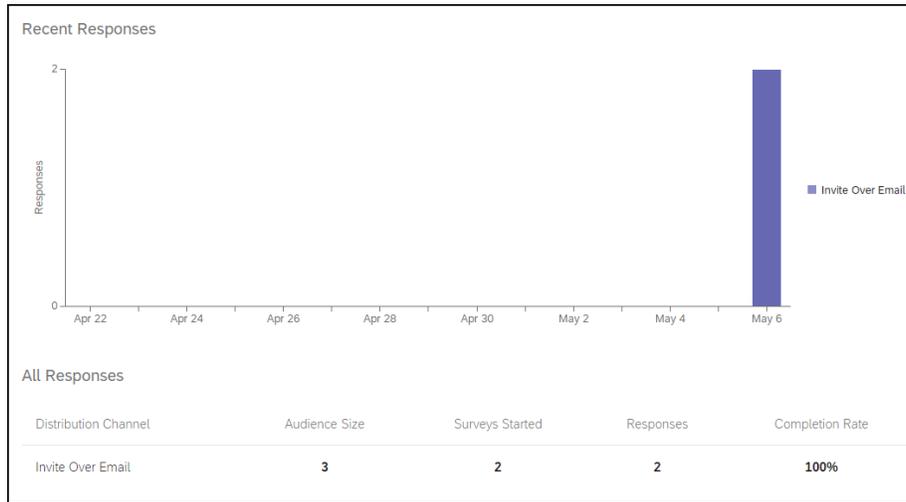
Show Advanced Options Cancel Send Preview Email Send In 1 day

- Preview the message before sending to ensure all looks correct. Use your own email address. Note that if you have included first name in the salutation, via piped text, it will not appear in the preview.
- If all looks good, click on the “Send” button (“Send in 1 day” in this case).

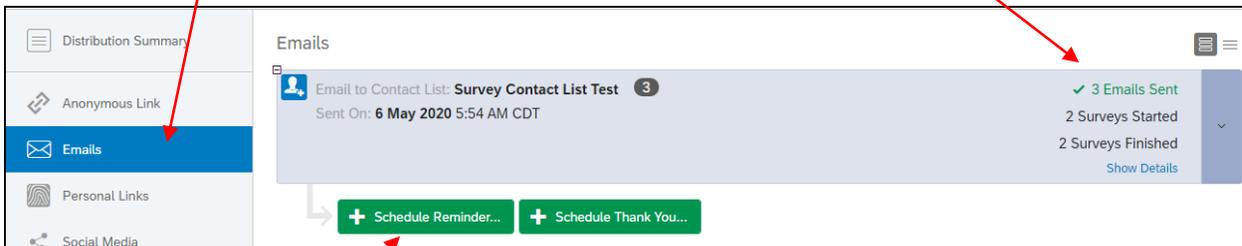
## Check Responses from the Initial Invitation

- At any point after the initial survey invitation launches, you can go back to the survey, click on “Distributions” and check for the number of responses.

- Qualtrics provides raw statistics and a graphical representation of recent responses over time (example below). Using the very small sample, two of three responded after one day.



- After the passing of a reasonable amount of time for participants to complete the survey, you can send a second invitation (reminder) to complete the survey – just to non-respondents. Click on “Emails” to schedule the reminder. Also, note summary stats to the right as well.



- Click on “Schedule Reminder.”
- You can also schedule a “thank you” note as well without sending any reminder. Such a scenario might involve a tight time deadline to collect data coupled a high response rate to the initial invitation.

- After clicking on “Schedule Reminder,” Qualtrics present a message template identical to the initial invitation except now notice the To: field” is to “Unfinished Respondents” which includes those who haven’t started the survey and those only partially complete. The custom text should convey a message about the invitation being a reminder and a due date.

**New Reminder Email**

To: Unfinished Respondents

From: surveys@ag.tamu.edu (From Address), Paul Pope (From Name), ppope@tamu.edu (Reply-To Email)

When: Send in 1 hour

Subject: Test of Email Compose without Personal Links

Message: Load Message

Follow this link to the Survey:  
 \${://SurveyLink?d=Take the Survey}

Or copy and paste the URL below into your internet browser:  
 \${://SurveyURL}

Follow the link to opt out of future emails:  
 \${://OptOutLink?d=Click here to unsubscribe}

Buttons: Cancel, Send Preview Email, Send in 1 hour

- Here is the template for the thank you note if you elect to have one in addition to the thank you respondents received when they completed the survey. Note the “To: field is to “Finished Respondents.”

**New Thank You Email**

To: Finished Respondents

From: surveys@ag.tamu.edu (From Address), Paul Pope (From Name), ppope@tamu.edu (Reply-To Email)

When: Send in 1 hour

Subject: Test of Email Compose without Personal Links

Message: Load Message

Follow the link to opt out of future emails:  
 \${://OptOutLink?d=Click here to unsubscribe}

Buttons: Cancel, Send Preview Email, Send in 1 hour