Instructions for emailing panel samples

Assumes you want to use emails to distribute to recipients with customized messages, unique links to the survey for each participant, want to control how long the email links are viable and/or schedule email delivery.

1. Select the survey and click on the Distribute Survey tab.
   Click on the Email Survey button.
   Click the green To: [Please Select] button and select the appropriate Library, Panel, and/or Panel Sample.
2. Select the time you want to send the email with the When button

3. Enter the appropriate information in the From Name, Reply-To Email, and Subject fields (these can be anybody or anything you want).

4. Construct the body of your message as you wish using the formatting tools. Note that the button {a} allows you to insert Piped Text into the content, which is useful for customizing the message using information from your panel and/or embedded data. If you use embedded data, you have to manually type the name in EXACTLY as it appears in the system (which you can see from the Panels Tab > Embedded Data button for a given panel). It is suggested that your content come before the automatically generated links at the bottom. For course evaluations, you must leave the lines with the survey links in the body.

   “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}”
For course evaluation emails you will want to delete the two Opt Out lines at the very bottom.

“Follow the link to opt out of future emails:

${!://OptOutLink?d=Click here to unsubscribe}”

1. If you want to limit the life of the email link, click the Advanced Options (next to Send Test Email). In the Advanced Options window, set the Email Expires In: to the desired length or Custom date/time. Please remember that this cannot exceed any availability set in the Survey Options.

2. Click the Schedule Mailing (or Send Now if the When is set to Send Now) button on the lower right to have the system send out the mailings as requested.

Find more like this: HowTo [2], Survey Distribution [3]

1. http://college.wfu.edu/qualtrics/author/claybrsd
2. http://college.wfu.edu/qualtrics/category/howto