

Qualtrics – Email Customized Links

<https://siue.qualtrics.com>

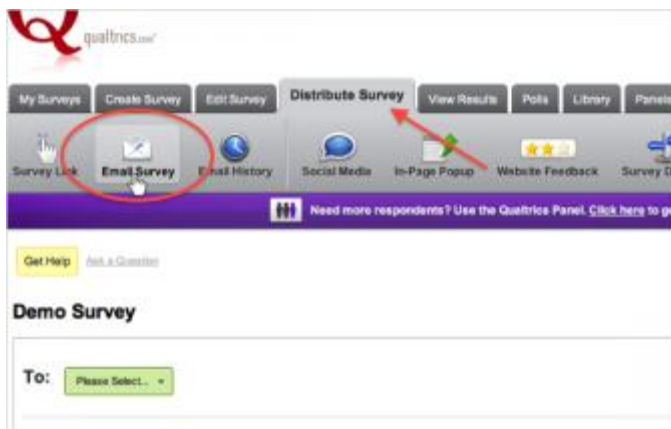
Use the Qualtrics Mailer to send your survey to a list of contacts, also referred to as a panel. When you use the Mailer, an email invitation is generated for each panel member containing a unique link that can be clicked on to take the survey. Use this distribution method if you would like to closely track responses.

[Traits of the Unique link](#)

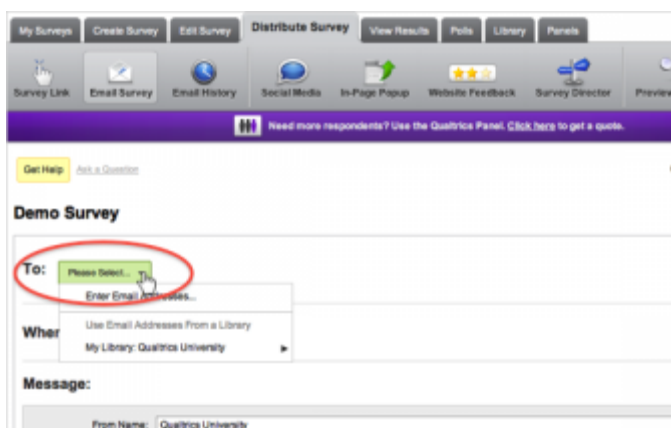
- By default, each unique link can only be used once, which prevents spamming.
- The data collected through the link is automatically attached to the respondents' panel information.
- The link allows you to track [responses in progress](#) and send out [reminder and thank you messages](#) to your contacts.
- The link automatically saves the respondents' data as they progress through the survey.

[send a survey through Email Survey](#)

1. Go to the **Distribute Survey** tab.
2. Click on the **Email Survey** icon.

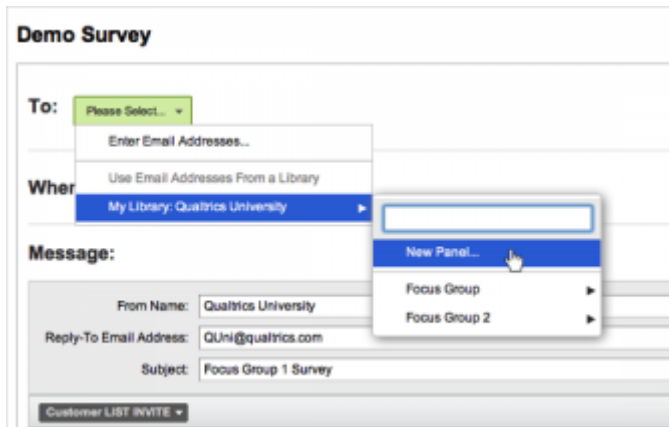


3. Click on the "To:" drop-down menu to select who should receive the survey.

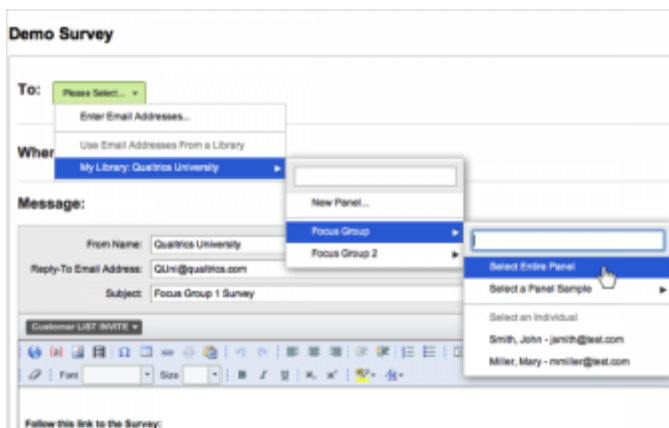


4. Choose to **Enter Email Addresses** manually, or select a panel from your library.
5. If using a panel, select **My Library** or **Group Library**.

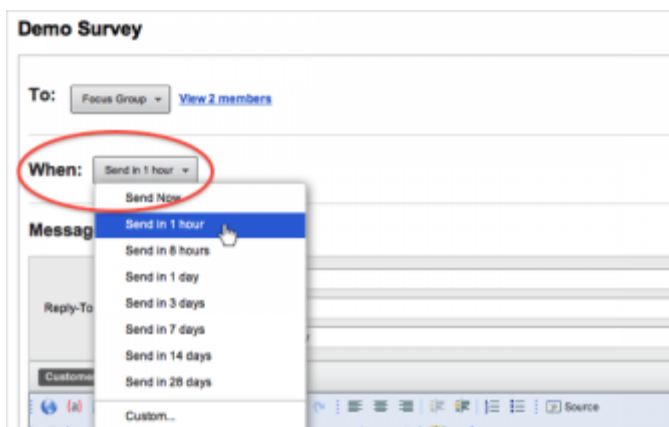
6. Choose to create a **New Panel** or select an existing panel. Visit the [Build a Panel](#) page to learn more about Panels.



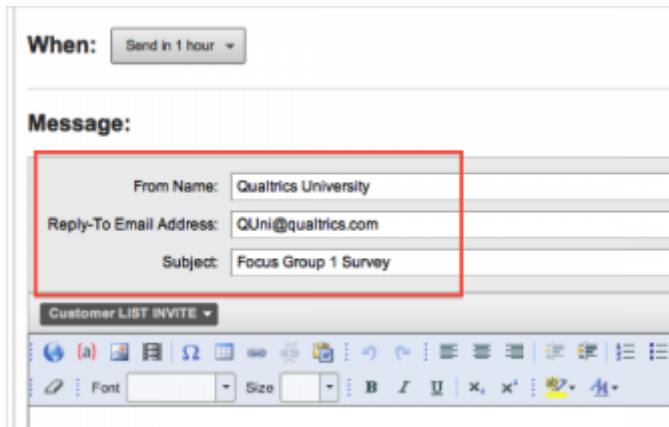
7. If using an existing panel, choose whether to **Select the Entire Panel**, **Select a Panel Sample**, or **Select an Individual from the panel**.



8. Next, choose **When** to send your survey. By default, it will be sent 1 hour from when you schedule the mailing.



- In the Message section, enter a **From Name**, **Reply-To Email Address**, and **Subject** for your email.

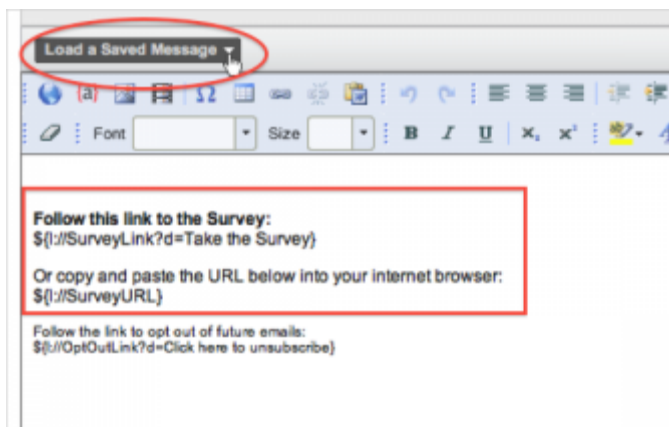


The screenshot shows the 'When' dropdown set to 'Send in 1 hour'. Below it is the 'Message' section with a red box highlighting the following fields:

- From Name: Qualtrics University
- Reply-To Email Address: QUni@qualtrics.com
- Subject: Focus Group 1 Survey

Below the fields is a 'Customer LIST INVITE' dropdown and a rich text editor toolbar.

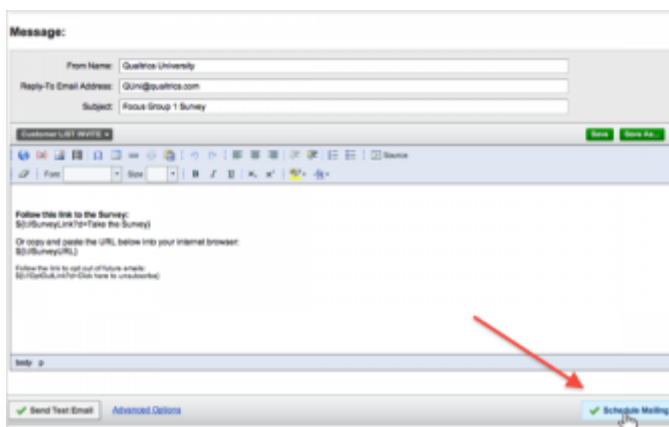
- You will see that the survey link is automatically inserted into the message box. Do not delete it. Type an email message into the [Rich Text Editor](#) incorporating the link, or click to **Load a Saved Message**.



The screenshot shows the 'Load a Saved Message' button circled in red. Below it is a red box containing 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}
Follow the link to opt out of future emails:
\${://OptOutLink?d=Click here to unsubscribe}

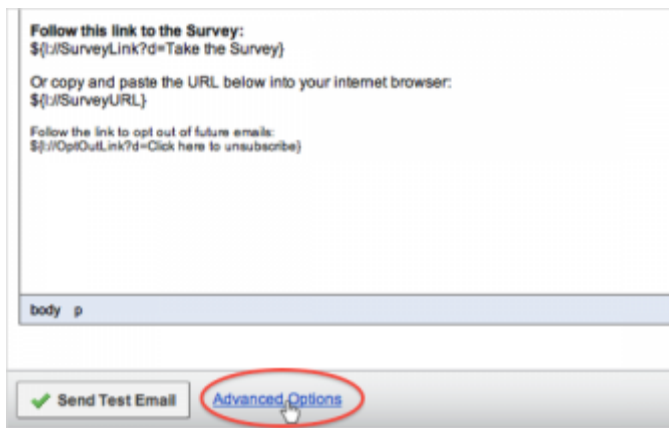
- If you've created a new email message, click the green **Save** button.
- Once the mailing is ready to be sent, click **Send Now** or **Schedule Mailing**.



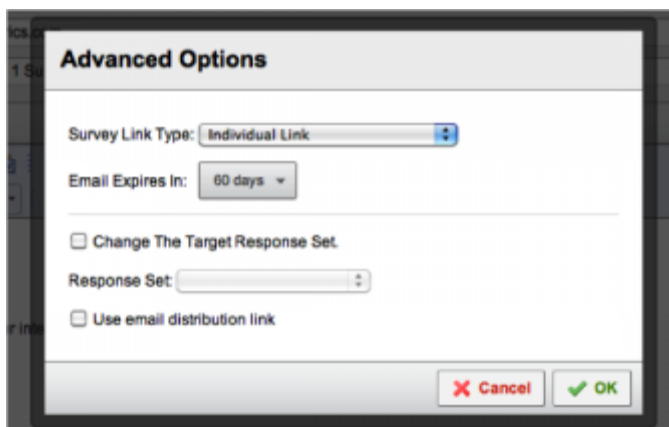
The screenshot shows the 'Message' section with the survey link text. At the bottom right, a red arrow points to the 'Schedule Mailing' button.

[Set up Advanced Options in the Mailer](#)

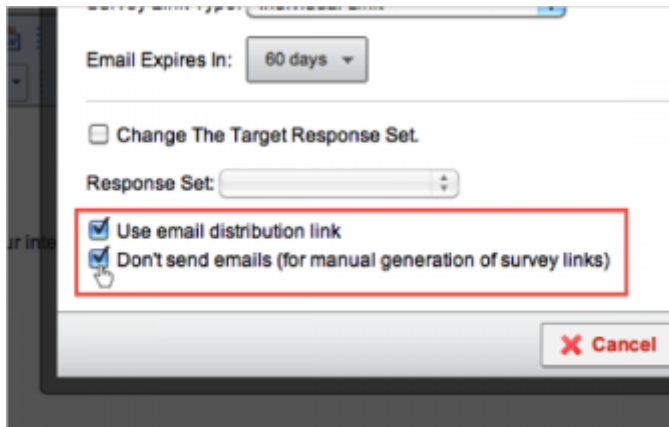
1. Click the blue **Advanced Options** link underneath the **Message** section.



2. Choose the **Survey Link Type**.

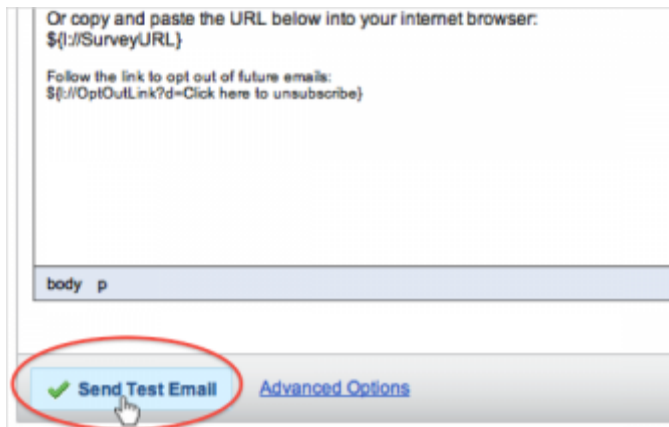


1. **Individual Link:** The default link type, sends each participant a link that can only be used once.
 2. **Multiple Completes per link:** Sends each participant a link that can be used multiple times. For example, if you are doing a school district survey, you could send a multiple completes link to each principal and ask them to forward it to all teachers. Reminder and Thank You Emails are not compatible with this link.
 3. **Anonymous Link:** Sends each participant the anonymous survey link. Reminder Emails, Thank You Emails, and participant tracking are not compatible with this link.
3. Choose when the email expires. By default, survey links are valid for 60 days. This means that if the link is not accessed for 60 days, it will expire.
 4. If needed, change which response set new responses should be saved in by clicking the **Response Set** drop-down menu. Please read the [Response Sets](#) tutorial before using Response Sets.
 5. If needed, check the box for **Use email distribution link** and select **Don't send emails**. This option is useful when you would like to generate unique links but do not want to send them out through our mailer. If you select this option and Schedule Mailing, no messages will be sent to participants. Instead, in the [Email History](#) section, you'll be able to click the **Actions** drop-down next to your mailing and select [Download Mailing History](#) to get a list of survey links. You can then send these links out through a Mail Merge in your own email account.

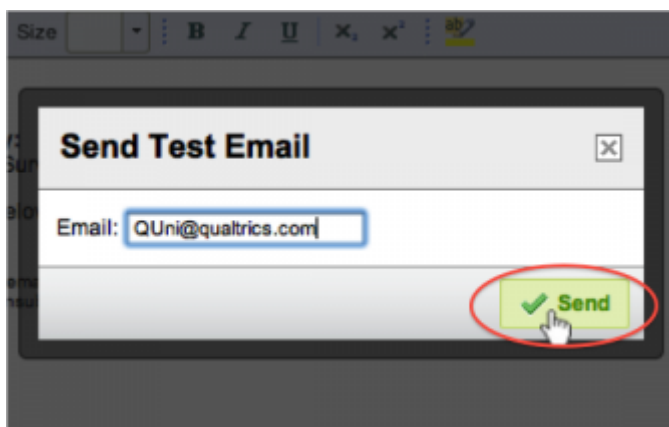


[Send yourself a test email](#)

1. After you have set up your mailing, click **Send Test Email** at the bottom left of the mailer.



2. Enter your email address in the space provided, and click **Send**.



- Note that the link that is sent out through the **Send Test Email** option is an anonymous link and will therefore not pull any information from your panel. This link is just for testing purposes.

[Opt-out link](#)

When you send a survey through the Email Survey tool, a link that auto-populates in the survey invitation message is the Opt-Out link. Unless you erase this link, members of your panel that are receiving the invitation will have the chance to Opt-Out of future mailings to that panel by clicking on the link.

When panel members select the link, they will be shown a page that alerts them they have been unsubscribed from the panel.

Once the opt-out has taken effect, the panel member will have a red dot next to their name when you look at the panel that contains their contact information.

More Information

[QTips](#)

- Survey invitation messages include three pieces of code—a survey link, a survey URL, and an opt-out link. To send your survey, you'll need either the survey link or the survey URL, but you can remove the opt-out link if it doesn't apply to your research.
- Email invitations can be customized with the participant's first name, last name, or any other information you have stored in the panel. To do this, you'll click the [Piped Text](#) Icon in the [Rich Text Editor](#) and select to pipe in a **Panel Field** (if you are using the First Name, Last Name, Email Address, External Data Reference, or Language), or an [Embedded Data](#) Field (if you are using any other information).
- The Email Expiration date set in the Mailer is specific to that individual mailing and is separate from the Survey Expiration date set in Edit Survey>Survey Options. Once an email has been sent, the Email and Survey expiration dates cannot be changed. If your survey also has a Survey Expiration date set before the Email Expiration date, the Survey Expiration date will apply.