

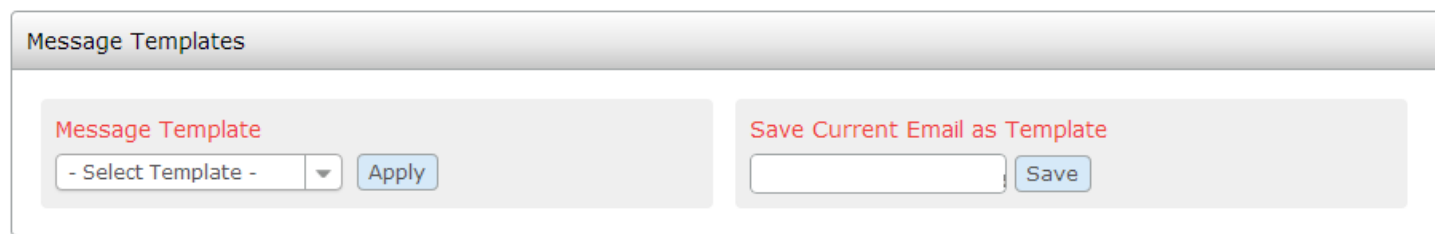


Survey Email Template User Guide

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MESSAGE TEMPLATES



The screenshot displays a user interface for managing message templates. It is divided into two main sections. The left section, titled 'Message Template', contains a dropdown menu with the text '- Select Template -' and a blue 'Apply' button. The right section, titled 'Save Current Email as Template', features a text input field and a blue 'Save' button.

Save Email as Template

You can save an email as a template however you cannot change a template name or delete a template once created, so it's important to consider these limitations when naming your template. These capabilities will be offered in future releases.

1. Optional: Select a **Template** from the Message Template dropdown. Click **Apply**.
2. **Modify** or enter the **Email Details**.
3. Enter a **Template Name** in the Save Current Email as Template text box.
4. Click **Save** next to the text box.

Select a Template

How to select a template:

1. In the Message Template section, **Select** a template from the dropdown menu.
2. Click **Apply**.

Modify Saved Template

1. Select the **Template** from the Message Template dropdown.
2. Make the desired **Changes**.
3. Enter the **Template Name** exactly as it appears in the Message Template dropdown to overwrite the existing template (any variations on the name will create a new template) or save the template with a **New Name** to create a new template.
4. Click **Save** next to the text box.

CC AND BCC

The ability to CC and BCC email's is a new feature and works just like an email program. This will allow you to send a copy of the survey invitation to people who may need to reference them, but not necessarily participate in the survey event.

- CC'ing will allow the recipient to see who was copied on the email.
- BCC'ing will not allow the recipient to see who was copied.
- To add multiple email address, use a semi-colon between addresses

Emails added to CC/BCC will get copied on every email sent for the distribution. It is recommended this feature only be used for small distributions.

EMAIL CONTENT (BODY TEXT/HTML)

Previously, the email content was broken out into two sections with the survey link inserted between the paragraphs. Compose your entire email in one box and copy/paste reference keys instead of typing them manually eliminating typing errors.

Reference Keys

The screenshot shows the email composition interface. On the left, the 'Body Text/HTML' field contains the following text:
{Customer_FirstName} {Customer_LastName}
You are invited to complete the Lapis Lazuli Engagement Survey. Please take the time to complete this survey openly and honestly as your feedback is very important.

Why you should respond;

- It's quick. The survey should take approximately 10 – 15 minutes to complete.
- Your feedback makes a difference. Survey results will help to identify strengths and areas for improvement, and to assist in setting goals.
- Greater participation adds to credibility of feedback. A high participation rate ensures results accurately represent the views of all employees.
- Your response to the survey is completely confidential. We have outsourced data collection and tabulation to a third party vendor. The link to the online survey will take you to an external website ensuring that responses cannot be linked back to individual employees.

On the right, the 'Send as HTML' checkbox is checked. Below it is the 'Copy Reference Key' tool, which features a dropdown menu with the selected key '{Customer_LinkToSu...' and a 'Copy' button. A tooltip explains: 'Add a link to the survey by selecting {Customer_LinkToSurvey_mResearch} from the drop down. Click 'Copy' and use 'CTRL+V' to paste into the Body Text/HTML.' Below this is the 'Send Email Preview' section, which includes a text input for 'Enter recipient email addresses', a 'Clear' button, and a 'Send Preview Email' button.

Add a reference key.

1. Select the desired **Key** from the dropdown.
2. Click **Copy**.
3. In the Body Text/HTML box, put your **Cursor** where you would like the reference key to appear.
4. Paste the reference key by clicking **CTRL+V** on your keyboard OR **Right Click** your mouse and select **Paste**.

Reference keys can be used to display recipient information or event specific information in your email. **Reference keys are case sensitive** so it's critical they are typed exactly as displayed below.

Reference Key	Description	Applicable Distribution Type
{Customer_FirstName}	Displays the recipient's first name	<ul style="list-style-type: none">• Unique• Generic (with individual password)• Generic (with distribution list)
{Customer_LastName}	Displays the recipient's last name	<ul style="list-style-type: none">• Unique• Generic (with individual password)• Generic (with distribution list)
{Customer_Email}	Displays the recipient's email	<ul style="list-style-type: none">• Unique• Generic (with individual password)• Generic (with distribution list)
{Customer_Saveld}	Displays the recipient's unique password.	<ul style="list-style-type: none">• Generic (with individual password)
{LinkTo_Survey_mResearch}	Inserts the survey link	<ul style="list-style-type: none">• All distribution types

Reference Keys Continued

Reference keys should look like this when added to the Email Subject or Body Text/HTML:

```
{Customer_FirstName} {Customer_LastName},  
You are invited to complete the 2014 Lapis Lazuli Engagement Survey.  
{LinkTo_Survey_mResearch}  
Thank you for your participation.
```

The result would look like this:

```
Tito Ortiz,  
You are invited to complete the Lapis Lazuli Engagement Survey.  
https://modsurv15.modernsurvey.com/mResearchSurveyEngine/Default.aspx?eaid=2EF1873E-9C04-48F1-9334-A8118F015749  
Thank you for your participation.
```

Survey Links

Survey links are **NOT automatically inserted** into the body of the email text. **You MUST add this in using the reference key: {LinkTo_Survey_mResearch}**. This can be found in the Copy Reference Key drop down menu. Copy and paste it into the Body Text/HTML.

1. Select the reference key **{LinkTo_Survey_mResearch}** from the dropdown menu
2. Click **Copy**.
3. In the Body Text/HTML box, put your **cursor** where you would like survey link to appear.
4. Paste the reference key by clicking **CTRL+V** on your keyboard OR **Right Click** your mouse and select **Paste**.

Example of a Plain Text email using the reference key.

```
{Customer_FirstName} {Customer_LastName},  
You are invited to complete the Lapis Lazuli Engagement Survey.  
{LinkTo_Survey_mResearch}  
Thank you for your participation.
```

Example of HTML Button email using the reference key.

```
<tr><td style="font-family: Verdana,Geneva,sans-serif; font-size: 10pt; background:#80CA7A;  
border-radius: 5px; padding: 0px 10px; color: #ffffff;" align="left" height="25"><div  
align="center"><a style="color: #ffffff; text-decoration: none;" href="{LinkTo_Survey_mResearch}"  
target="_blank">Go to Survey</a></div></td></tr>
```

There is one scenario where you **would not** use the reference key. If you have created a **short URL** and have set the distribution to **Generic (with or without distribution)** you would enter the survey link directly into the message body exactly where you would like it to appear.

Example of HTML Button email using short URL.

```
<tr><td style="font-family: Verdana,Geneva,sans-serif; font-size: 10pt; background:#80CA7A;  
border-radius: 5px; padding: 0px 10px; color: #ffffff;" align="left" height="25"><div  
align="center"><a style="color: #ffffff; text-decoration: none;"  
href="https://msuitelink.LapisLazuliEngagementSurvey.com" target="_blank">Go to  
Survey</a></div></td></tr>
```

SEND EMAIL PREVIEW

Body Text/HTML

{Customer_FirstName} {Customer_LastName}
You are invited to complete the Lapis Lazuli Engagement Survey. Please take the time to complete this survey openly and honestly as your feedback is very important.

Why you should respond;

- It's quick. The survey should take approximately 10 – 15 minutes to complete.
- Your feedback makes a difference. Survey results will help to identify strengths and areas for improvement, and to assist in setting goals.
- Greater participation adds to credibility of feedback. A high participation rate ensures results accurately represent the views of all employees.
- Your response to the survey is completely confidential. We have outsourced data collection and tabulation to a third party vendor. The link to the online survey will take you to an external website ensuring that responses cannot be linked back to individual employees.

Send as HTML

Copy Reference Key ⓘ

{Customer_LinkToSu...}

Add a link to the survey by selecting {Customer_LinkToSurvey_mResearch} from the drop down. Click 'Copy' and use 'CTRL+V' to paste into the Body Text/HTML.

Send Email Preview

Enter recipient email addresses

Emails are best viewed in an email program so we removed the Preview button and included the option to send an email directly to your inbox. This is also handy if you would like to send test emails to others for review of content and aesthetics.

1. Click **Send Email**.
2. Enter your **Email Address**.
3. Click **Send Preview Email**.

When you send an email preview you will still see the reference keys instead of the Survey URL or Customer Names as this information is generated from the event. If you would like to test the email with the URL and Reference Keys generated, use the 'Send Additional Emails' feature located at the bottom of the Schedule/Launch Survey Event page.

Events Distribution Lists New Event New Distribution List

EVENTS × Event Administrations × Schedule/Launch Survey Event

Send Additional Emails ⓘ

First Name Last Name Email

REFERENCE

Distribution List Definitions

- Unique:
 - Select Unique to send unique links to each member of your distribution group via email notification.
- Generic with Distribution Group:
 - Select Generic (with distribution group) to send an anonymous link to your distribution group via email notification.
- Generic without Distribution Group:
 - Select Generic (without distribution group) if your survey will be anonymous and access to the survey will be through some other method.
- Password:
 - Select Generic (with individual password) to send an email with an anonymous link to each member of your distribution group. The first page of the survey will require participants to enter a unique password to continue.
- With Registration Form:
 - Select Generic (with registration form) if your survey will require participants to register with their first name, last name and email address before starting the survey.