

Survey Distribution via Qualtrics

At first you need to create a mailing list (Panel):

Create a new panel under “Contacts” and create contact list, assign a name, add contacts by typing in their addresses or importing them from Excel (also per drag& drop) and save.

Add Contacts

Import From a File | Add Manually | Import From a Survey

Create Contact List

Name: test

Folder: [Dropdown]

Cancel | Next >

Browse... | Reload | Show Options

File Requirements

- The first row must have the field names for each column.
- Each row must have a primary email address (Email). All other fields are optional (FirstName, LastName, etc.)
- The maximum file size is 100mb.

Updating Existing Contacts

- Use a 'RecipientID' column containing recipient IDs and add any optional fields
- Contact data will be updated. New fields will be added as necessary.

Example Document

Skip this step | Add Contacts

Automatic invitation via email

Under tab Distribute Survey click Email Survey and open the following path until you reach “Select Entire Contact List”. Select, edit the text, set the schedule and send.

Compose Email

To: Select Contacts

From: Stefan Dressler

When: Send in 1 hour

Subject: Test

Message:

Send Now

Send in 1 hour

Send in 8 hours

Send in 1 day

Send in 3 days

Send in 7 days

Send in 14 days

Send in 28 days

Custom...

From Name: Stefan Dressler

Reply-To Email: dressler@fhwn.ac.at

Search...

My Library: Stefan Dressler

Test

test

test137

Test_0202

Select Entire Contact List

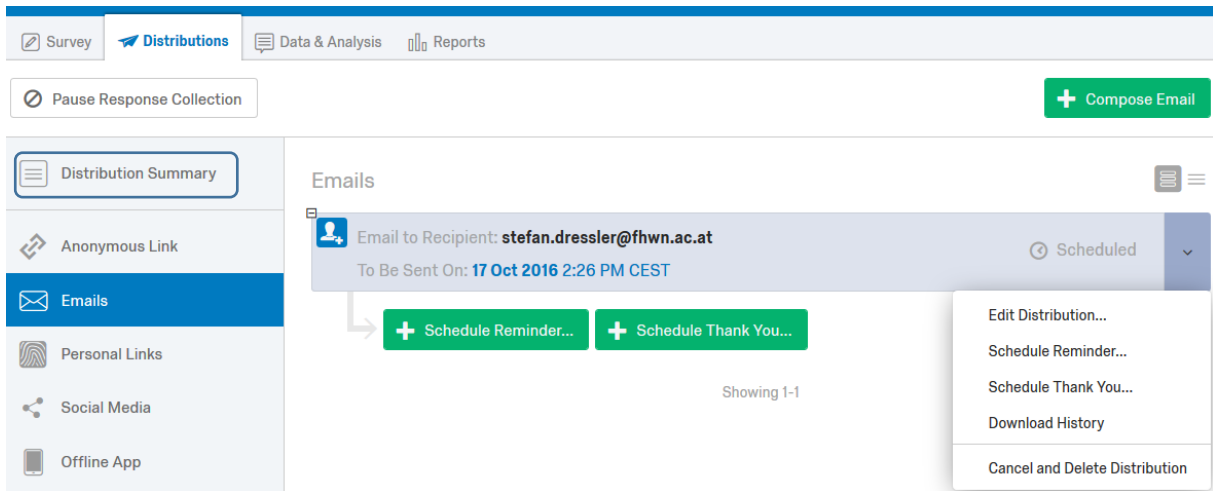
Samples

Select an Individual

ahofer@fhwn.ac.at

stefan.dressler@fhwn.ac.at

Show Advanced Options | Cancel | Send Preview Email | Send in 1 hour



Now that the first and important step is done, you may monitor the process under the tab Distribution Summary. Here you see how many persons received the invitation, started and finished the survey and you eventually may send them an acknowledgment or a reminder.

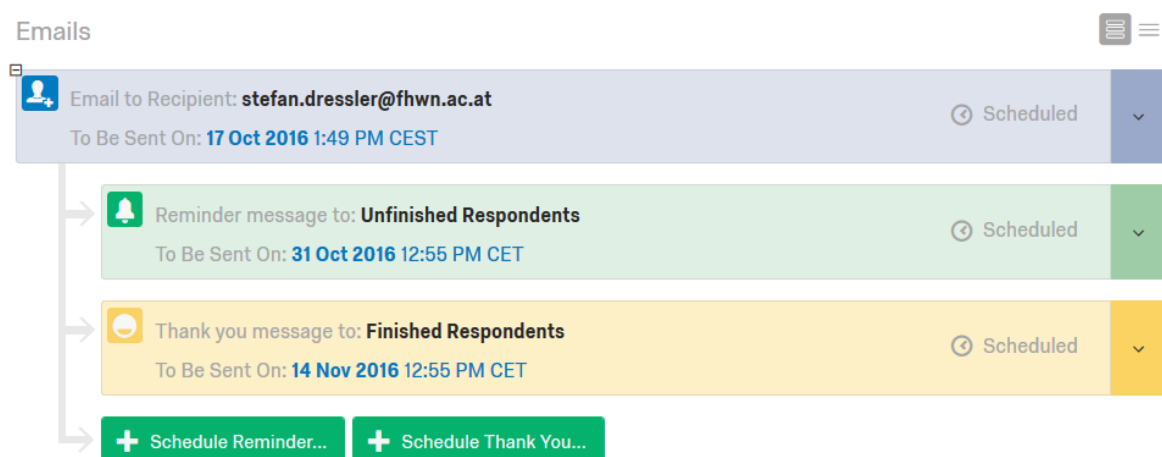
Manual selection of a reminder-mail (only to respondents who have not yet started)

Qualtrics stores the addressees with their own anonymous ID, so that they can be reminded in an accurate way.

Manual selection of a thank-you-mail (only to respondents who have already finished)

If you notice that the survey has already been completed, you can of course also send acknowledgments.

An example for a schedule:



Qualtrics-Video and Support:

<http://www.qualtrics.com/university/researchsuite/distributing/email-survey/email-history/#remindermessages>