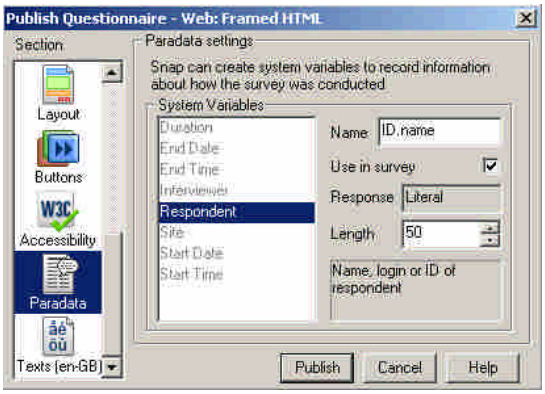
Emailing Invites to Respondents from a Database

Respondents listed within an external database can be invited, via email, to complete a web questionnaire. This is set up using the **Database Link Wizard**. Reminders can also be automatically sent out, which is also set up within the Database Link Wizard. More detailed instruction on using the **Database Link Wizard** is found in User Guide 3 – 'Data Entry'. The following example demonstrates how to send out email invites to a list of customers contained within a Microsoft Excel spreadsheet.

Ensure the survey you wish to import the data into is open. For example, a file called Customers.xls is opened within Microsoft Excel.

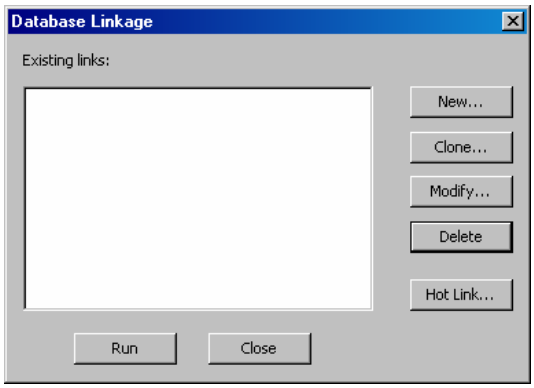
In order to set up Email Invites, ensure you have selected the Respondent option in the **Paradata** section of the **Web Publication dialog box**. This will automatically set up a literal variable which will store the interviewee's email address once the database link is set up and run.



Open the **Data Entry Window** by clicking on the Data Entry button.

Select **File | Database Link** to display the **Database Linkage** dialog box.

Click on the New... button to create a new database link.



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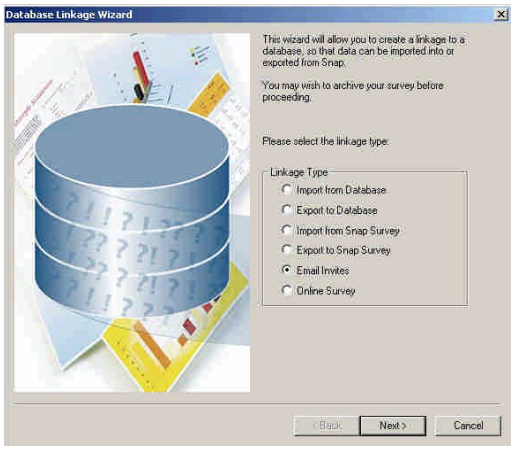
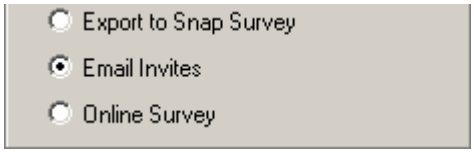
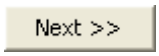
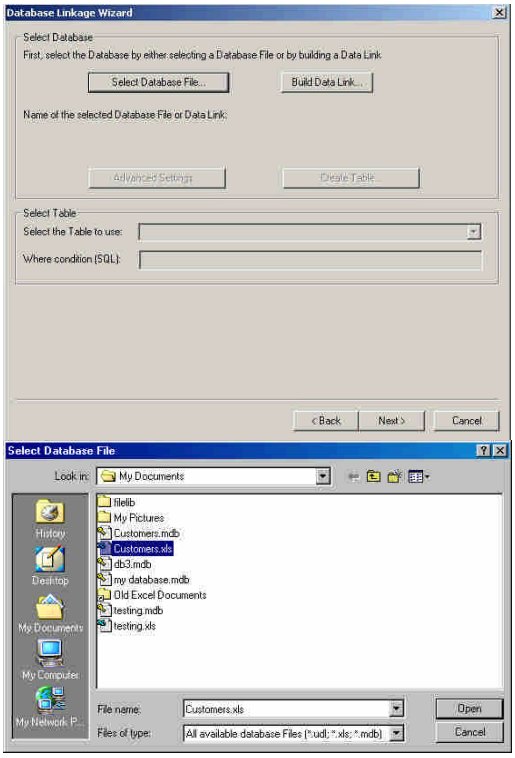


The Database Wizard dialog will be displayed. This dialog informs you that you can create a linkage to a database, allowing you to either import data into Snap, export data from Snap into a database or send email invites. Click on the **Email invites** radio button.



Click on 



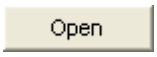
The next step in the wizard asks you to select a database file or build a database link. The

button allows you to specify a link to a database type if it is not already listed as one of the defaults in the **Select Database File** dialog box.

Click on the

button.

This will display a **Select Database File** dialog box. Select the file you require by selecting the relevant drive and folder. The files of type drop down, which is displayed below file name, may also need to be changed. In the example on the right, we will select an Excel spreadsheet called Customers.xls. Every record in the selected database file will be emailed.

Click on the 

button.

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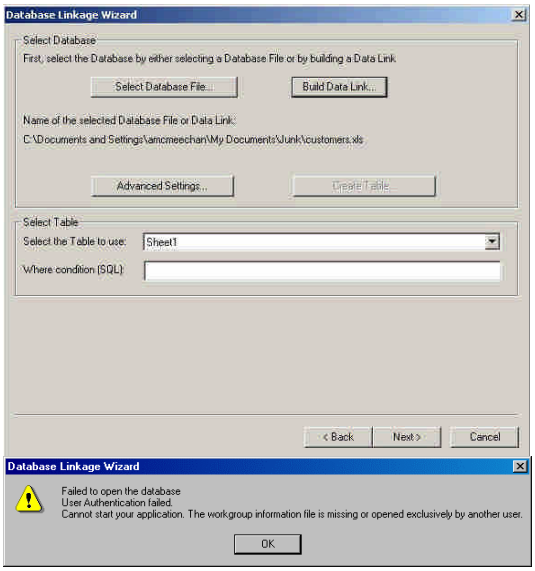
Click on the Advanced Settings... button if your database file requires a Use I.D. or password for access, enter them accordingly, if not leave them blank. The Advanced Settings button is also used if your database file has any SQL Queries.

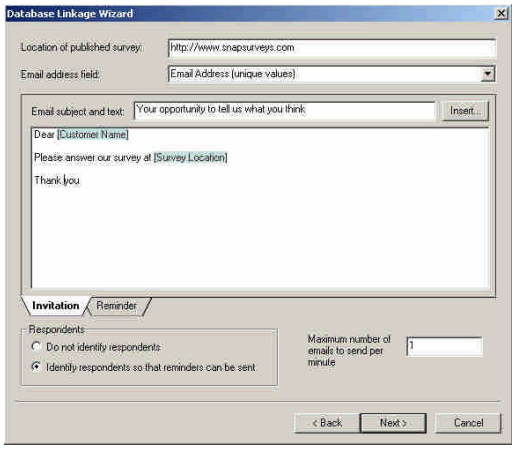


If the user name or password is incorrect, the following dialog box will be displayed. Retype or check your database program for the correct user information.

If the correct information has been entered a list of tables will be displayed in the **Select Table** drop down menu. Select the table you require from the list.

Click on Next >>.

The next dialog asks you to complete details of where the survey is located, which database field contains the email address and the text you require on the email.



In the **location of published survey**, type in the full location of your survey. For this example, our survey is located in:

http://www.snapsurveys.com/mysurvey.htm

Email address field: select the field from the drop down list that contains your email addresses. This drop down list displays all the fields within the database file.

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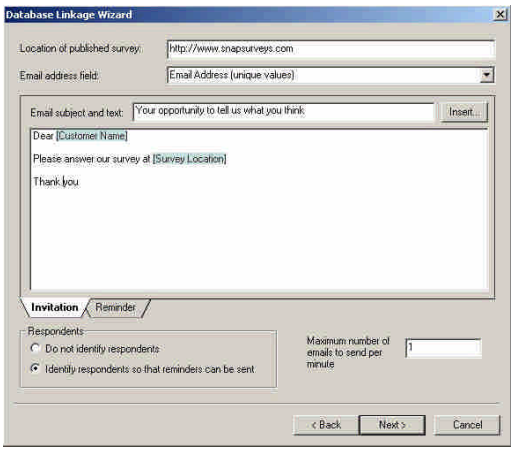
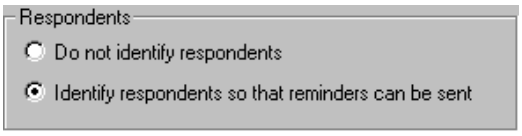


Email subject and text: type the subject heading of your email in the first box. In the example on the right, we have typed "Your opportunity to tell us what you think".

Use the big text box to type in your main email. Use the Insert button to either insert a **Database Field** or **Survey Location**. In the example shown on the right, the word Dear is typed, then press Insert and select **Database Field.** Select Contact Name from the list. Type your main message text. For example, "Please answer our survey at..". Click on Insert and select **Survey Location.** This will insert the survey location that has been specified at the top of this dialog window. This can be viewed when the emails are sent out. Finish your email with any more text required.



Select one of the Respondents options. The first option **Do not identify respondents** will ensure their replies remain confidential. The second option **Identify respondents so that reminders can be sent** generates a unique code for each respondent so respondents can be identified and reminders can be sent out if required.

The maximum number of emails to send per minute is set to 1, but can be changed accordingly.

Click on Next >>.

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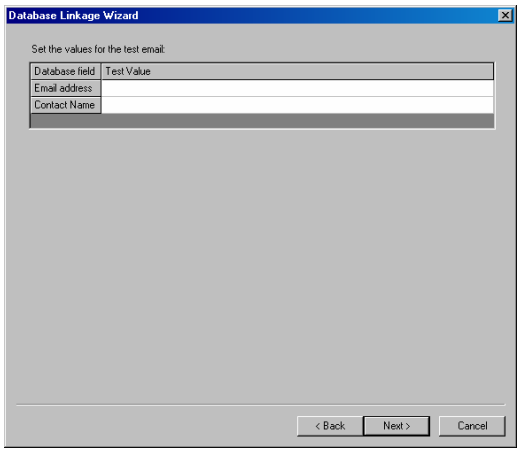
continued



The next window asks you to perform a test by typing in an email address and contact name. When you run the database wizard, Snap will ask you if you wish to perform a test run using the data contained within this dialog box.

Click on Next >>.

Enter a Name and Label if required and click on the Finish button. The Database Linkage initial window is presented to you. You can either choose to close the Wizard and run the database link at a later time, or choose to run the Wizard now. Select the **Run** button. The emails will be compiled by Snap and sent out to the complete list of respondents contained within the database file.