

Email Distribution

Send your survey's link to your email lists within Zoho Survey, without having to switch a tab. You can also track the responses and see the details of opened, unopened, bounced, and unsubscribed invites.

There are four ways to do this:

- Zoho Survey's email distribution
- Zendesk integration
- <u>Shopify integration</u>
- Eventbrite integration

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+	≔	Brand Awareness Survey 🥒	EDITOR SETTINGS	THEMES HUB LAUNCH		PR	EVIEW
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BUILDER	• Web	o Link		· <u> </u>			
Ċ	• Dis	tribution					
REPORTS	• E • C • F • Visil	imail ampaigns acebook billity		Send and track your survey link			
	- Off						
	 Buy Res Pas 	responses trictions sword Protection	zendesk	🛐 shopify	eventbrite		
	 Close 	se Survey	Send surveys to your contacts on Zendesk	Send surveys to your customers on Shopify	Collect your attendees' expectations and feedback through Eventbrite		
			CREATE EMAIL	CREATE EMAIL	CREATE EMAIL		

Note : You can send up to 3000 email invites per 24 hours period with a maximum of 1000 email invites for integrated apps (<u>Eventbrite</u>, <u>Zendesk</u>, <u>Shopify</u>) per campaign and 500 email invites for Zoho Survey email distribution. Your total email invites will be 60000 per 30 day period. To send to a larger client list, you can use Zoho Campaigns, which is integrated with Zoho Survey. Read on our email distribution terms and conditions here.

To send surveys through emails :

1. Go to the *Launch* tab.

LAUNCH

2. Click **Distribution** on the left pane. You can access this only after you publish the survey. The email distribution option is the default selection.



3. Click **Create Email** to send and track your survey link. If you have already created one before, click **Create New**. You can also, send surveys through Zendesk, Shopify, and Eventbrite.



- 4. Click the email address displayed in the *Reply to* box if you want to change the default 'from' email address.
- 5. Type the name of the sender in the *Sender name* field.
- 6. Type the recipients' email addresses in the *Send to* box.
- To import contacts by uploading CSV or XLS files, or by manually typing the contact details, click Import Contacts.
 - Click **CSV** and select **Choose file** to upload a CSV file.
 - Click **XLS** and select **Choose file** to upload an XLS/XLSX/ODS file.
 - Click Manual to type or copy-paste contacts manually. Insert known variables, separated by commas, to tag respondents. For the manually-inserted <u>custom variables</u>, responses are in the <u>Individual Responses</u> section of the reports. Note : Email invitations will be sent as many times an email address occurs in a contact list and the corresponding invitation variables are recorded for each occurrence of the email.
 - Type a name for the new group of contacts you import in the *Name your new group* box.
 - Click **Add** to add the group to the recipient's list.

IMPORT C	CONTACTS	>
csv	Is Manual	
Copy and paste, or enter your contacts. Separate individual fields for each conta	. Enter one contact per line. act with a comma.	
Email, First Name, Last Name, Variable1, Variable5, Variable6 Email, First Name, Last Name, Variable1, Variable5, Variable6	Variable2, Variable3, Variable4, Variable2, Variable3, Variable4,	
Email, First Name, Last Name, Variable1, Variable5, Variable6 Email, First Name, Last Name, Variable1, Variable5, Variable6 Name your new group GROUP_26_Jun_19	Variable2, Variable3, Variable4, Variable2, Variable3, Variable4,	

- 8. Type a subject for the email in the *Subject* box.
- 9. Click or hover over the email template and click 🧷 to edit the email template or you can click the

Edit button on the top right corner of the message box. You can make edits to the default template that gets displayed here.

- Click the dropdown arrow next to the edit button and select **Save as template** to save any changes you make.
- Click **Select an existing template** to choose from a list of templates you have already made.
- Click **Insert Variable** to personalize the body of the template to include contact information like first name, last name and custom variables. You can embed a multiple choice, rating, drop down or NPS question from the first page of your survey directly into your email. This particular question will replace the **Begin Survey** button as a link to your survey.

🥝 Survey		Department: My Department 👻 🎧
+ ∷≣ Brand Awareness Survey ∥	EDITOR SETTINGS THEMES HUB LAUNCH	PREVIEW
Collector List Language SUMMARY US region ~ Default (en)		
BUILDER - Web Link	Create Email	
• Distribution	Reply to	
Email Compaigne		
 Campagns Facebook 	Sender name	
 Visibility 		
Embed	Send to	
Offline Survey	Recipients	
Buy Responses	Subject	
Restrictions	I'd like your opinion	
 Password Protection 	Name	
Close Collector	Message Use First Question EDIT Y	
	Brand Awareness Survey We're conducting a survey and your opinions would be appreciated. Click the button below to start the survey. Thank you for your participation! Begin Survey	
	Please do not forward this email. Its survey link is unique to you. Unsubscribe from this list Premet for Survey	
	Note: Use 'Restrictions', in the left menu, to prevent multiple responses or to collect responses anonymously	
	I agree to the E-Mail Distribution - Terms of Service Powered by 2015	
	SAVE SEND	۵

- Click **Save** to save the changes.
- Choose to enable or disable the footer in your surveys in the *Footer* section when you use the email distribution feature.
- Click **Background color,** and **Font color** palettes in the *Button* section to adjust the background and font colors of the button name respectively.
- The logo that is added in the **Settings** tab will be added here.
- Make edits to the button name in the *Button name* field, if required.
- Click **Background color** and **Font color** palettes in the *Header* section to adjust the background and font colors of the template respectively.
- 10. Make edits to the title of the email template, if any, in the *Title name* box. If you do not make any changes to the title, it will take the name of the survey by default.
- 11. Click **Send** to distribute your survey through email. You can also save a draft version and send it later.

To change the 'From' email address:

- 1. Go to the *Launch* tab.
- 2. Click **Distribution** on the left pane. You can access this only after you publish the survey. The email distribution option is the default selection.
- 3. Click **Create Email** to send and track your survey link. If you have already created one before, click **Create New**. You can also, send surveys through <u>Zendesk</u>, <u>Shopify</u>, and <u>Eventbrite</u>.

4. Click the email address displayed in the *Reply to* box if you want to change the default 'from' email address.

To import contacts by uploading CSV or XLS files:

- 1. Go to the *Launch* tab.
- 2. Click **Distribution** on the left pane. You can access this only after you publish the survey. The email distribution option is the default selection.
- 3. Click **Create Email** to send and track your survey link. If you have already created one before, click **Create New**. You can also, send surveys through <u>Zendesk</u>, <u>Shopify</u> and <u>Eventbrite</u>.
- 4. Click Import Contacts .

+ IMPORT CONTACTS

- Click **CSV** and select **Choose file** to upload a CSV file.
- Click **XLS** and select **Choose file** to upload an XLS/XLSX/ODS file.

IMPORT C	CONTACTS	×
csv	s Manual	
Copy and paste, or enter your contacts. Separate individual fields for each contacted Email, First Name, Last Name, Variable1, Variable5, Variable6 Email, First Name, Last Name, Variable1, Variable5, Variable6	Enter one contact per line. act with a comma. Variable2, Variable3, Variable4, Variable2, Variable3, Variable4,	
Name your new group GROUP_30_Mar_20		
CANCEL	ADD	

To edit the contents of the email:

- 1. Go to the Launch tab.
- 2. Click **Distribution** on the left pane. You can access this only after you publish the survey. The email distribution option is the default selection.
- 3. Click **Create Email** to send and track your survey link. If you have already created one before, click **Create New**. You can also, send surveys through <u>Zendesk</u>, <u>Shopify</u>, and <u>Eventbrite</u>.
- 4. Click the *Select a question to be embedded* dropdown list to select the question you want to embed in the email.
- 5. Click or hover over the email template and click 🧷 to edit the email template or you can click the

Edit button on the top right corner of the message box. You can make edits to the default template that gets displayed here.

- 6. Click the dropdown arrow next to the edit button and select **Save as template** to save any changes you make.
- 7. Click **Select an existing template** to choose from a list of templates you have already made.
- 8. Click **Insert Variable** to personalize the body of the template to include contact information like first name, last name and custom variables.

Message		Select a question to be embedded	~	EDIT	~
	Auto	Survey			
	We're conducting a surv appreciated. Click the button for your	ey and your opinions would be below to start the survey. Thank you • participation!			
	Blogge do not forward this of	in Survey			
I	Please do not forward this er Unsubsci P	nail. Its survey link is unique to you. <u>ibe</u> from this list owered by Survey		l	

To customize the colors of the email invite:

- 1. Go to the *Launch* tab.
- 2. Click **Distribution** on the left pane. You can access this only after you publish the survey. The email distribution option is the default selection.
- 3. Click **Create Email** to send and track your survey link. If you have already created one before, click **Create New**. You can also, send surveys through <u>Zendesk</u>, <u>Shopify</u>, and <u>Eventbrite</u>.
- 4. Click **Background color** and **Font color** palettes in the *Button* section to adjust the background and font colors of the button name respectively.
- 5. Make edits to the button name in the *Button name* field, if required.
- 6. Click **Background color** and **Font color** palettes in the *Header* section to adjust the background and font colors of the template respectively.

Title name	
Auto Survey	
Background color	Font color
#282828	#FFFFF
BODY	
B <i>I</i> <u>U</u> 14 ▼ △	
BUTTON Button name	
BUTTON Button name Begin Survey	
BUTTON Button name Begin Survey Button URL The button has the survey's URL include variables in this URL. + Add Parameter	. Add dynamic parameters to
BUTTON Button name Begin Survey Button URL The button has the survey's URL nclude variables in this URL. + Add Parameter Background color	. Add dynamic parameters to Font color
BUTTON Button name Begin Survey Button URL The button has the survey's URL include variables in this URL. + Add Parameter Background color #f93468	Add dynamic parameters to
BUTTON Button name Begin Survey Button URL The button has the survey's URL include variables in this URL. + Add Parameter Background color #f93468 ::: FOOTER Show "Powered by Zoho	Add dynamic parameters to Font color #FFFFFF

Add Parameters

Add Parameter provides you the option to map URL parameters with dynamic parameters. If you have a question in the survey form and wish to autofill it, or you wish to pipe data to the questions using the URL parameter, then you can use the Add Parameter feature.

Note:The Add parameter feature can be used only via spreadsheets.

How to add parameters in Email distribution

Follow the steps below to add parameters in Email distribution:

- Go to the **Launch tab**, then publish your survey if it's a draft.
- Under distribution in the left pane, choose **Email Distribution**.
- Click the **+ CREATE NEW** button.

OVERVIEW	RECIPIENTS		+ CREATE NEW
		Invitations sent	
		2 Total Invites	
		 O opened (0%) 	
		2 unopened (100%)	
		 O bounced (0%) O unsubscribed (0%) 	

- Click Create Email to send and track your survey link. If you've already created one before, click Create New. You can also send surveys through <u>Zendesk</u>, <u>Shopify</u>, and <u>Eventbrite</u>.
- In the Compose Email page, click the **Edit Message** button.

Compose Email	Templates 🗸
Subject	Insert Variable
I'd like your opinion	
Message	
Carry Forward Use Case	
We're conducting a survey and your opinions would be appreciated button below to start the survey. Thank you for your participa	d. Click the ation!
Please do not forward this email. Its survey link is unique to yo <u>Unsubscribe</u> from this list Powered by Survey	bu.
ె _{ల్ల} ్ Survey	

• Scroll down to the BUTTON section, then click **Add Parameter**. Provide a parameter name and map it to the parameter value. For example, here, I am planning to pre-populate the name of the survey responders, so I name it "Parameter Name" and select First Name as **Value**.

HEADER	
Title name	
Auto Survey	
Background color	Font color
#282828	#FFFFF
BODY	
B <i>I</i> <u>U</u> 14 ▼ <u>A</u>	E▼ 2 Insert Variable ▼
We're conducting a survey and appreciated. Click the button b Thank you for your participation	your opinions would be elow to start the survey. n!
BUTTON	
BUTTON Button name	
BUTTON Button name Begin Survey	
BUTTON Button name Begin Survey Button URL The button has the survey's URL. A nclude variables in this URL. + Add Parameter	dd dynamic parameters to
BUTTON Button name Begin Survey Button URL The button has the survey's URL. A nclude variables in this URL. + Add Parameter Background color	dd dynamic parameters to
BUTTON Button name Begin Survey Button URL The button has the survey's URL. A nclude variables in this URL. + Add Parameter Background color #193468	Add dynamic parameters to
BUTTON Button name Begin Survey Button URL The button has the survey's URL. A nclude variables in this URL. + Add Parameter Background color #f93468 #f93468 #fOOTER Show "Powered by Zoho S	Add dynamic parameters to Font color The second sec

The button has the surve include variables in this U + Add Parameter	y's URL. Add dynamic parameters to JRL.
URL Parameter	y's URL. Add dynamic parameters to
include variables in this U	JRL.
include variables in this U Parameter Name	Parameter Value

• Click **OK**, and go to Builder. Here, add the question whose value needs to be pre-populated. For example, I'm adding a Short Answer type question to ask the names of respondents and autofill the name.

★	Short Answer 💲	
Question B I 20 - A What is your name? Make this question mandatory		Insert Variable • 65499
Textbox size	40 Characters ~	
 Prepopulate answer Value from URL parameter Question hint Data Privacy Encrypt answer 	Value Value	Editable
CANCEL		SAVE

- Click the the advanced options, then tick the **Pre-populate answer** checkbox. For the field, **Value from** provide the URL parameter option and map it to the variable value you have configured in Email distributions. Click **SAVE**.
- Navigate back to Launch section> Email distributions, then select Continue with Draft.



• Update the sender Info, then click **NEXT**.

Specific contacts Send your invites directly to	any contacts
Enter email addresses se	parated by commas (e.g., steve@email.com,marie@email.com)
Note:	
Note: • To prevent multiple respor contact (email/sms)	nses, go to Restrictions > Response Restriction > One response per
Note: • To prevent multiple respor contact (email/sms) • To collect responses anon	nses, go to Restrictions > Response Restriction > One response per hymously, go to Restrictions > General Restrictions

• Click on the upload button in **Send To > Specific Contacts**

end To		
Specific contacts Send your invites directly to	o any contacts	
Enter email addresses se	eparated by commas (e.g., steve@email.com,marie@email.com)	€
Contacts based on trigge	RS	
Contacts based on trigge Send invites to the people l	ers based on events created via third-party apps	
 Contacts based on trigge Send invites to the people I Note: To prevent multiple respo contact (email/sms) 	based on events created via third-party apps onses, go to Restrictions > Response Restriction > One response per	
 Contacts based on trigge Send invites to the people I Note: To prevent multiple respondent (email/sms) To collect responses another 	ers based on events created via third-party apps onses, go to Restrictions > Response Restriction > One response per nymously, go to Restrictions > General Restrictions	

• Import contacts as **CSV** or **XLS**, or do so manually by typing in the textbox provided below. Click **ADD**, then **NEXT**.

IMPORT CONTACTS	×
csv xls Manual	
Copy and paste, or enter your contacts. Enter one contact per line with	
individual fields separated by a comma.	_
Email, Phone Number, First Name, Last Name, Variable1, Variable2, Variable3, Variable4, Variable5, Variable6 Email, Phone Number, First Name, Last Name, Variable1, Variable2, Variable3, Variable4, Variable5, Variable6	
Name your new group	
GROUP_18_Dec_24	
CANCEL ADD	

• Choose the type of **Invite** and set the type of delivery.

• Further, if you wish to pipe this value to the questionnaire, add the question to which the value needs to be piped, click **Insert Variable** at the top-right corner, then choose the param-name.

×							N	lultiple	Choi	ice (M	any	Answers) 💲	
🖉 Ed	litor	ĥ	Disp	lay Lo	gic	몽 An	swer D)isplay L	ogic				
C	Questio	on										2	1 Insert Variable 🗸
	в	I	<u>u</u> :	20 -			ç	ß [ŀ	≣ ¦≣	=	URL Parameters	
	Hi \$	{Na	ame}	, v	vhich	dish d	lid y	ou like	e the	e mos	st?	param-name	
				.,								Questions	
												AP What is your name	e?
												Which product did you f find besrt?	find best? Which product did you
	Mak	ke thi	s ques	tion n	nandat	ory						WIRII Washing Machir	ne
A	Answer												

To track the survey:

1. Go to the *Launch* tab.



2. Click **Email** on the left pane.



3. Click **Overview** to see the following details.

/ERVIEW RECIPIENTS		
Q Search Recipients	_	All recipients
Email	Sent	Responded
triciab@zylker.com	Yes	Not responded
tamarah@zylker.com	Yes	Not responded
evanr@zylker.com	Yes	Not responded
fatimay@zylker.com	Yes	Not responded
cameronp@zylker.com	Yes	Not responded
russellt@zylker.com	Yes	Not responded
janicev@zylker.com	Yes	Not responded
nathanb@zylker.com	Yes	Not responded
	~	

- **Invites** Displays the details on how many of your respondents have opened your invite, how many are yet to open it, if any email has been scheduled or bounced, or if someone has unsubscribed to your invite.
- **Responses** Displays the total number of responses, and the details of completed, partial, and disqualified responses.
- **Invite History** Displays the date and other details of each invite.
- 4. Click **View** for a detailed history.
- 5. Click **Create Reminder** to send reminder emails to people who have not responded to your survey. Follow the steps in editing the email template to draft a reminder email.

View

```
Create Reminder
```

- 6. Click **Recipients** to see the following details.
 - **Search Recipients** Search for a recipient by using keywords.
 - Email Displays email addresses of the email invitees.
 - **Download as CSV** Download the list of filtered recipients in a CSV format.
 - Sent Displays whether your invite has been sent.
 - **Responded** Displays the response status of your survey. If they have responded, click **View Response** to view the responses you have received. It will take you to the reports section where you can see detailed response details.
 - Filter Filter your recipients based on various parameters.
 - **All recipients** To view all the recipients
 - No responses To view the recipients who haven't responded yet
 - Partial responses To view the ones who have partially responded
 - Complete responses To view the ones who have submitted complete responses
 - Disqualified responses To view the recipients who don't fit your requirements
 - **Opened** To view the recipients who have opened the invite

- Unopened To view those who haven't yet opened the invite
- Unsubscribed To view those who have unsubscribed to your mailing list
- Bounced To view the invites that haven't reached your recipients yet
- Not sent To view the invites that have not gone out of your mailbox
- Failed To view the invites that have failed to send

VERVIEW	RECIPIENTS		+ CREATE NEW
Q Search	n Recipients		Unopened 🗸
Email		Sent	Responded
triciab@z	ylker.com	Yes	Not responded
tamarah@	@zylker.com	Yes	Not responded
evanr@zy	ylker.com	Yes	Not responded
fatimay@	zylker.com	Yes	Not responded
cameron	p@zylker.com	Yes	Not responded

To search for a contact to find out if they have answered your survey:

- 1. Go to the *Launch* tab.
- 2. Click **Email** on the left pane.
- 3. Click **Recipients** and search for recipients in the search bar by using keywords.

OVERVIEW RECIPIENTS			+ CREATE NEW
Q robin	×		Unopened 🗸
Email		Sent	Responded
robin@zylker.com		Yes	No responses
robin@zylker.com		Yes	No responses

To filter your email distribution contacts:

You can filter your email distribution contacts based on the following parameters:

- All recipients To view all the recipients
- No responses To view the recipients who haven't responded yet
- Partial responses To view the ones who have partially responded
- Complete responses To view the ones who have submitted complete responses
- Disqualified responses To view the recipients who don't fit your requirements
- **Opened** To view the recipients who have opened the invite
- Unopened To view those who haven't yet opened the invite
- Unsubscribed To view those who have unsubscribed to your mailing list

- **Bounced** To view the invites that haven't reached your recipients yet
- Not sent To view the invites that have not gone out of your mailbox
- Failed To view the invites that have failed to send

Schedule Email Distribution

You can now automate an email distribution invite or a reminder to be sent out at a time you decide.

To schedule an email invitation:

- 1. Once you click *Send* , you'll be prompted to choose from the following options:
 - Immediately
 - Schedule

Immediately	Schedule
Send your invitation right away	Schedule your invitation to send later
SEND NOW	SEND LATER

- 2. To send it at once, click **Send Now** .
- 3. To send it at a later point, click **Send Later** .
 - Select *Send on a Particular Date and Time* if you would like to select the date and time in the calendar.
 - Select *Send Periodically* if you want the invite to be sent out daily, weekly, monthly, or at a custom interval of your choosing.
 - Select the start and end date schedule in the *Start Date* and *End Date* calendars respectively.
 - Click the *Set Interval* dropdown to select the interval and time at which the email invite needs to be sent out.
 - If you want to set a custom interval, click *Custom Interval* and select the interval and date from the dropdown.
- 4. Click Schedule .

To edit a scheduled email invite:

- 1. Open the email invite and click Edit Schedule Time .
- 2. Make any necessary changes, then click Schedule .

To delete a scheduled invite:

1. Click the delete icon next to the invitation you want to delete from the list of scheduled invites.

2. Click **Yes** in the confirmation dialogue box that follows.

To schedule a reminder for an invite you have sent:

- 1. Hover over an email invite you have sent, then select **Create Reminder** .
- 2. Select a filter in the *Send to* field.
- 3. Make any necessary edits in the email, then click **Send**.
- 4. To send it at once, click Send Now .
- 5. To send it at a later point, click **Send Later** .
 - Select *Send on a Particular Date and Time* if you would like to select the date and time in the calendar.
 - Select *Send Periodically* if you want the invite to be sent out daily, weekly, monthly, or at a custom interval of your choice.
 - Select the schedule start date in the *Start Date* calendar. You can send up to three reminders per invite.
 - Click the *Set Interval* dropdown to select the interval and time at which the reminder needs to be sent out.
 - Click *Custom Interval* if you would like to select an interval and date from the dropdown.
- 6. Click Schedule .

To schedule a reminder for an invite that has been scheduled:

- 1. After you schedule the invite, you can select from the following options on the schedule invitation success screen:
 - Schedule Reminder Later You can schedule a reminder later to be sent days after you send out your invite.
 - Schedule Reminder Now You can schedule a reminder immediately after you schedule the invite.
 - You can also create a reminder by clicking **Create Reminder** from the *Scheduled Invitations* list.
- 2. Select a filter in the *To* field, then make necessary changes in the email body.
- 3. Click Schedule .
- 4. Select Send on a Particular Date and Time to choose when the reminder needs to be sent.
 - Select the number of days after which the schedule should start, and the time in the dropdown. You can send up to three reminders per invite.
- 5. Select *Send Periodically* and select the number of days after which the schedule should start in the dropdown.
- 6. Click the Set Interval dropdown and select daily, weekly, monthly, or custom interval.
 - Select the time at which the reminder needs to be sent out.
 - Click *Custom Interval* if you would like to select an interval and time at which the reminder needs to be sent.
- 7. Click **Schedule** .

To edit a scheduled reminder:

- Hover over an invite in the Invite History section, then click and select Edit .
 Select a filter in the *To* field and make necessary changes in the email body.
 Make and necessary edits in the email, then click Edit Schedule Time .
 Update the schedule time and click Schedule .

 To delete a scheduled reminder:
 - 1. Hover over an invite in the *Invite History* section, then click
 - 2. Click **Yes** in the confirmation dialogue box that follows.

Email Campaigns

Email campaigns help you send your survey to a lot of people at once. Zoho Survey is integrated with Zoho Campaigns and MailChimp, so you can link your survey with either of these accounts and send your survey to your contacts via an email campaign. Read more on both of these integrations in the respective <u>Zoho Campaigns</u> and <u>MailChimp</u> pages.

and select **Delete**.

