




Creating a survey and integrating it in mailings

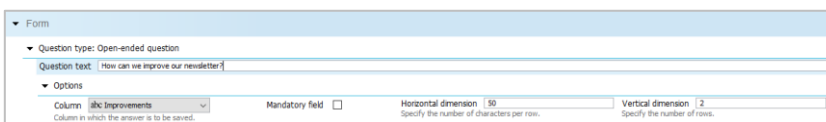
Smart Guide


This Smart Guide shows you how to create a survey using a dynamic webpage and integrate it into your mailings. The answers of your recipients are stored in their profiles in *Inxmail Professional*. For this purpose, you must create the following table columns in the recipient database.

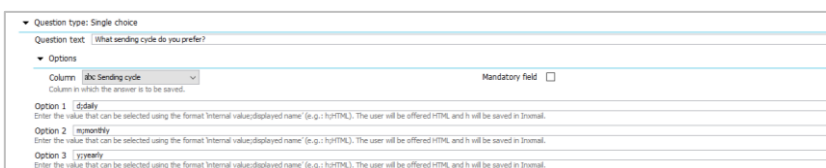
Preparation: Columns that need to be created: Wellness, Beauty, Sport (all as *Yes/No* column type), Improvements and Sending cycle (both as *Text* column type) [1].

Creating a survey

1. Open the  (*Global settings*) and the  (*Files & web pages*) agent.
2. Click the *Web pages* tab and then click  (*Create new web page*).
3. Enter a name and select *Survey (standard)* as the template.
4. Click *OK*.
5. In the *Settings* main element, select the *List* whose recipients are to be given access to the survey.
6. In the *Target page* field, specify the landing page to which the survey participants are to be directed after answering the questions. Should none exist, leave the field blank. The predefined text stored in the *Style* main element will take effect [2].
7. Specify whether mandatory fields are to be marked with an asterisk (*).
8. Click the *Form* main element [3]:
9. The *Open-ended question* is preset for the first form field. Enter the following *Question text* and settings here [4]:



10. Click  (*Add element*) on the form toolbar.
11. On the *Element for form* level, select the *Question type: Single choice* element, then click *Add + Close*.
12. Enter the following question in the *Question text* field and enter *Option 1* (*Option 2* and *Option 3* will be added in the next step):



[1] QUESTION TYPES

The following types of questions are available in Inxmail Professional:

Multiple choice question:

'Which newsletter topics interest you?' Possible answers: 'Wellness', 'Beauty', 'Sport' (the participant can select multiple answers).

Open-ended question:

'How can we improve our newsletter?' Possible answers: blank text field (the participant can write their own answer).



Single choice question:

'How frequently would you like your newsletter to appear?' Possible answers: 'daily', 'weekly', 'monthly' (the participant can select only one answer).

[2] ADJUST STYLE

Predefined layout settings (CSS stylesheet) and texts (buttons, page titles, general texts and system messages) of the web page can be edited in the *Style* main element.

[3] ARRANGE ELEMENTS

Click an element and use the arrow icons  (*Move element up*) and  (*One element down*) to change how the elements are arranged.

13. Click the *Question type: Single choice* element name and then click the **+** (*Add element*) button to expand the form.
14. Select the *Element for question type: Single choice* level followed by the *Option* element, and confirm with *Add + Close*.
15. Fill out the second option, and add the third option using the same procedure.
16. Click **+** (*Add element*) on the toolbar.
17. On the *Element for form* level, select the *Question type: Multiple choice* element and click *Add + Close*.
18. Enter the following Question text and Option 1:

Question type: Multiple choice
 Question text: What are you interested in?
 Option 1
 Text: Wellness | Value (selected): true | Value (not selected): false | Column: Wellness
 Option 2
 Text: Beauty | Value (selected): true | Value (not selected): false | Column: Beauty
 Option 3
 Text: Sport | Value (selected): true | Value (not selected): false | Column: Sport

19. Click the *Question type: Multiple choice* element name and then click the **+** (*Add element*) button to expand the form.
20. Select the *Element for question type: Multiple choice* level followed by the *Option* element, and confirm with *Add + Close*.
21. Fill out the second option, and add the third option using the same procedure [5].
22. Click **Save**. Then click **Publish web page**. Specify the *File name* and *Directory* and confirm with *OK*.
23. To test the survey, click **View published web page** and enter your email address. Confirm by clicking *Send*. The link to the survey will then be sent to you. Clicking the link will take you to the survey [6].

[1] DATA PROTECTION

It is not possible to generate an anonymous survey for which user data is not saved. Therefore, for data protection reasons, make sure you inform all survey participants accordingly.

[4] TEXT FIELD SIZE AND MANDATORY FIELD

If an answer must be entered in the field (required field), select the *Mandatory field* check box.

Make sure that the input field you create for the answer is sufficiently large. In our example, we specify the horizontal field size (input field width) as 50 characters and the vertical field size (input field length) as 2 characters.

The reader can only enter as much text as the text field or column allows. If the text exceeds the specified number of characters, it is truncated.



[5] ACTIVATION AND ACCESS DATA

In the *Validity* main element, you can activate or deactivate the survey and define terms and conditions of participation.






The notification email that is sent to the survey participant can be edited in the *Email content* main element.

Integrating the survey into your website


Integrate the form into a web page using *Dynamic entry*. You need a container web page for this. The page must contain the Inxmail [`!include(content)`] command [7].

1. In the *Settings* main element, add the *Dynamic entry element* and enter the URL of the blank page including the character set encoding.
2. Click  (Save).
3. Click  *View web browser preview* to open and test the form.

Integrating the survey into your newsletter (Smart Template)

1. Click  (*View web browser preview*) and copy the URL from the browser.
2. In the  Mailings agent, double-click the mailing into which the survey is to be integrated.
3. In the editor, click the position where you want to integrate the survey link. Click the  (*Insert link*) button and paste the copied URL from the clipboard. Alternatively, you can integrate the link in your mailing using the *Further link* element (depending on template programming).
4. Click  (Save).
5. Test the integrated link in the  *Check workflow* step before sending the mailing [8].

Storage and analysis of the data

After the user has sent the survey, *Inxmail Professional* saves the survey result in the corresponding columns of the recipient table. You can create an Analysis of recipient data on the  (*Reports*) tab.

[6] TESTING THE SURVEY


For the survey link to be sent to you, your email address must be stored in the recipient database.

[7] IFRAME & DYNAMIC ENTRY

'Dynamic entry' is recommended for static web pages. For performance reasons, the complete web page is cached for one hour, cleared and then cached again.

In the case of dynamic web pages, hourly updating may be too infrequent. We therefore recommend the use of IFrame here.

[8] USING THE SURVEY WITHOUT A SMART TEMPLATE

In the case of text and HTML mailings in *Inxmail Professional*, the necessary recipient parameters are not automatically added to the URLs. You need to enter the link or URL in the editor using an HTML command – placement of the link using the  (*Insert link*) button will not work!

HTML code for standard link:

```
<a href="http://inxmail.de/survey.jsp?params=[%online_params]">To survey</a>
```

HTML code for a tracking link:

```
<a href "[%url:unique-count; "http://inxmail.de/survey.jsp " ]&params=[%online_params]">To survey</a>
```

If data should not be encrypted, replace `online_params` with `online_params_unencrypted`. The command passes all values in plain text that are required, among other things, for the personalisation of Dynamic Web Pages (JSP).