

## Checkbox 5 - Email Invitations Guide

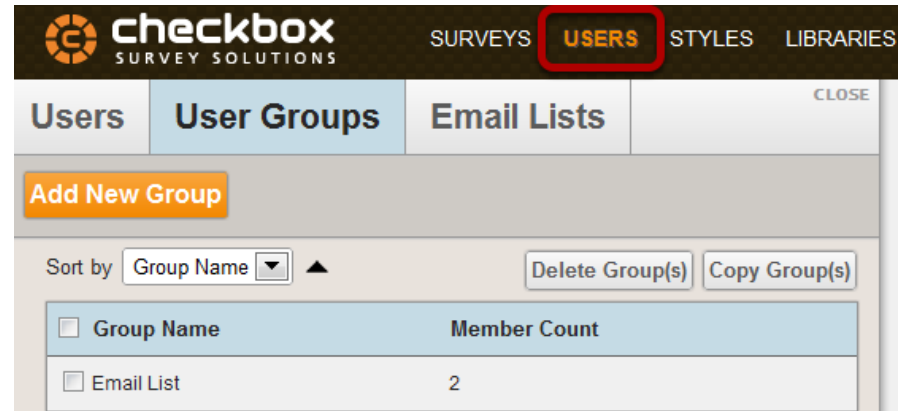
This guide will show you how to deploy a survey using Checkbox's Email Invitations Wizard.

*Note: This feature is not required to deploy your survey (survey activation URLs can also be sent via personal email or embedded in a website), but Checkbox invitations are recommended for tracking respondent data.*

### Determine Users

Before entering the Invitations Wizard to create a survey invitation, make sure any user(s) you plan to include on your invitation recipient list have been added to the **Users Manager** and/or belong to the appropriate group/list to avoid having to go back and make these changes after you have already begun the invitation creation process.

*Checkbox Tip: If you are not ready to select user recipients you can always create an invitation draft and add recipients later.*



The screenshot shows the Checkbox Survey Solutions interface. The top navigation bar includes 'checkbox SURVEY SOLUTIONS', 'SURVEYS', 'USERS' (highlighted with a red box), 'STYLES', and 'LIBRARIES'. Below this, there are tabs for 'Users', 'User Groups', and 'Email Lists'. An 'Add New Group' button is present. A 'Sort by' dropdown menu is set to 'Group Name'. There are 'Delete Group(s)' and 'Copy Group(s)' buttons. A table displays the following data:

<input type="checkbox"/>	Group Name	Member Count
<input type="checkbox"/>	Email List	2

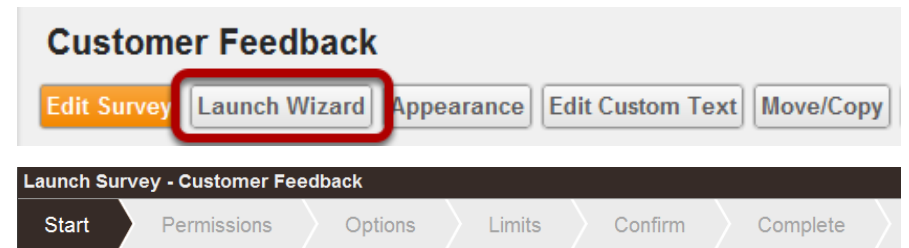
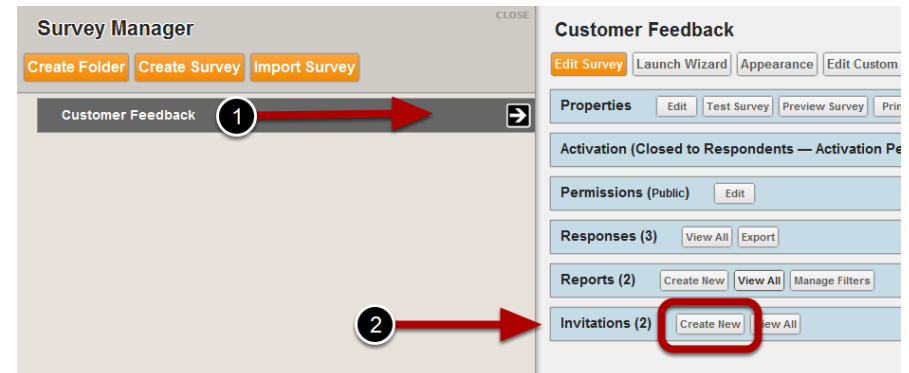
## Select Survey

There are two ways to reach the **Invitations Wizard**. The first way is to create a new invitation directly from the survey dashboard using the steps below:

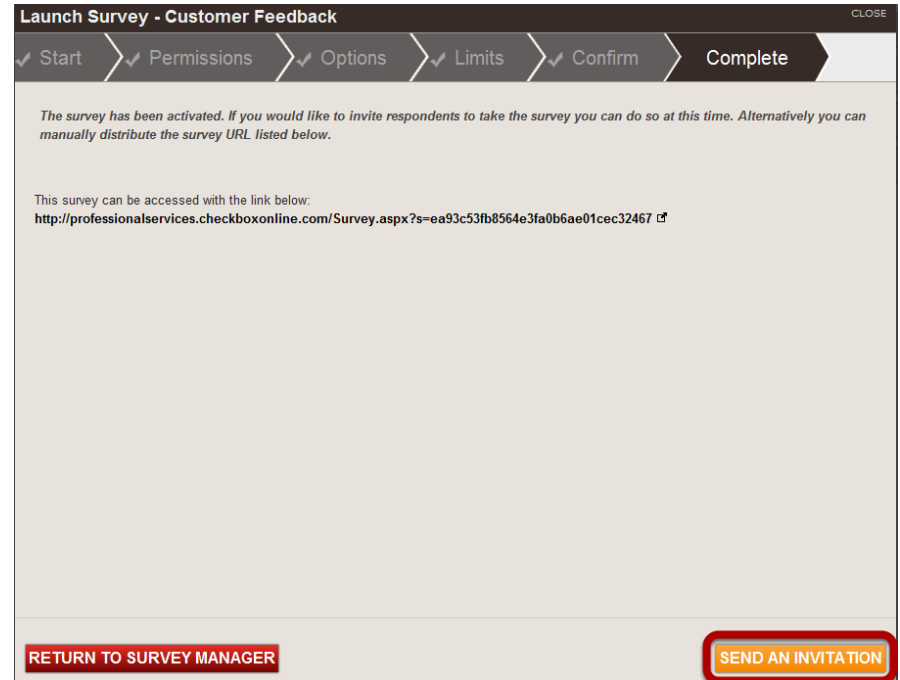
1. From the **Survey Manager**, select the survey you wish to deploy an email invitation for.
2. Under **Invitations** in the survey dashboard, click the **Create New** button to begin the **Invitations Wizard**.

The second way to reach the **Invitations Wizard** is through Checkbox 5's new **Launch Wizard**, located in the top menu of the survey dashboard.

The Launch Wizard guides you through the steps of launching a survey, including **Permissions**, **Options**, and **Limits**.



Once you reach the final stage of the Launch Wizard you have the option to either return to the Survey Manager or send an invitation. Select the **Send an Invitation** button to begin the **Invitations Wizard**.



The screenshot shows a web interface for launching a survey. At the top, a dark header contains the title "Launch Survey - Customer Feedback" and a "CLOSE" button. Below the header is a progress bar with five steps: "Start", "Permissions", "Options", "Limits", and "Confirm", each with a checkmark and a right-pointing arrow. The "Complete" step is highlighted with a dark background. The main content area has a light gray background and contains the following text: "The survey has been activated. If you would like to invite respondents to take the survey you can do so at this time. Alternatively you can manually distribute the survey URL listed below." Below this is a line of text: "This survey can be accessed with the link below:" followed by a URL: <http://professionalservices.checkboxonline.com/Survey.aspx?s=ea93c53fb8564e3fa0b6ae01cec32467>. At the bottom of the screen, there are two buttons: "RETURN TO SURVEY MANAGER" on the left and "SEND AN INVITATION" on the right, which is highlighted with a red border.

**Invitations Wizard: NAME**

You have now entered the Checkbox 5 **Invitations Wizard**.

1. First, provide an **Invitation Name**. The Invitation Name is visible only within the Checkbox application to help you identify this invitation.
2. Under **Invitation Message Options** you can choose to either create a new invitation from scratch or make a copy of an existing invitation (select from drop-down).
3. Next, determine whether you wish to format your email in Text or HTML.
4. Next, enable Other Options:
  - Enabling the option to "Allow recipients to opt-out of future emails about this survey" will remove recipients from any future emails sent for this particular survey, such as a reminder email.
  - Enabling the option to "Allow embedid survey link to automatically log users in" means that any recipients with a Checkbox user profile will be automatically logged into the survey when they click on the embedded survey link in your email, allowing their user attributes (first name, last name, username, etc.) to be tracked along with their responses.
5. Select **Next** to continue.

NAME & OPTIONS

Message Recipients Review Finish

Provide a name for your invitation and choose the options you'd like to use in creating the invitation. The name is visible only within Checkbox® to help you identify this invitation. You will be able to set the invitation subject separately in the next step.

Invitation Name

Customer Feedback Survey

Message Options

Source

Create a new, blank invitation

Copy the message and subject from an existing invitation (you may still edit this message and subject)

Customer Feedback Survey

Email Format

HTML

Text

Other Options

Allow embedded survey link to automatically log users in

Allow recipients to opt-out of future emails about this survey

CANCEL

NEXT

**Invitations Wizard: MESSAGE**

1. Enter the **From Email Address** and **Subject** of your invitation. In the Subject field you have the ability to merge in text from either a Survey Item Answer, User Attribute, Response Data, or Survey Data using the drop-down below the text field.
2. Enter your invitation message in the text box provided using either **HTML** or **Text** format. Within the message text you have the ability to **merge** in text from either a Survey Item Answer, User Attribute, Response Data, or Survey Data using the drop-down below the text box.
3. Select **Next** to continue.

*Checkbox Tip: Be careful not to modify or delete the survey activation link ("Click Here"). Recipients follow this link to take your survey.*

The screenshot displays the 'Message' step of the Invitation Wizard. The 'From' field is set to 'admin@checkbox.com' and the 'Subject' is 'Customer Satisfaction Survey'. A red arrow labeled '1' points to the 'From' field. The message body contains a survey activation link: 'Click here to take this survey.' A red arrow labeled '2' points to this link. At the bottom right, a red box highlights the 'Merge' dropdown menu, with a circled '3' next to it. The interface includes a toolbar for text formatting and navigation buttons: 'CANCEL', 'PREVIOUS', and 'NEXT'.

## Invitations Wizard: RECIPIENTS

At this point you have the option to add recipients to your email list. If you choose not to add recipients at this time, select **Next** and your email will be saved as a draft, which you can add recipients to in the future.

Close

✓ Name & Options ✓ Message Recipients Review Finish

Select the type of recipient you would like to add. A new window will open allowing you to select additional recipients for this invitation.

Users  
Groups  
Email Addresses  
Email Lists

Current recipients

Search  Search

No recipients found that match filter.

Remove Selected Recipient(s)

CANCEL PREVIOUS NEXT

If you wish to add recipients to your email list, select the type of recipient you would like to add from the four options on the left-hand side of the window. Options include **Users**, **Groups**, **Email Addresses**, and **Email Lists**. In this example we will be adding a User Group to the recipient list.

Users  
Groups  
Email Addresses  
Email Lists

1. Once you select a **recipient type** ('Group' in this example), a window appears from which you can select one or more recipients. In the example above, we have selected 'Test Group' as our recipient.
2. When you have made your recipient selection(s), click the **Add to Invitation** button to add recipients to email invitation list.

*Checkbox Tip: If you have a long list of user(s), use the **Search** field to filter users*

The screenshot shows a window titled "Add Recipients". At the top right, there is a search field with the text "Search" and an orange "Search" button. Below this is a table with three columns: "Name", "Description", and "Members". The table has one row with a checked checkbox in the "Name" column, the text "Email List" in the "Description" column, and the number "2" in the "Members" column. A red arrow points from the "Email List" text to a circled "1". At the bottom left of the window is an orange "Back To Recipient List" button. At the bottom right is an orange "Add to Invitation" button, which is highlighted with a red border and a circled "2".

<input type="checkbox"/> Name	Description	Members
<input checked="" type="checkbox"/> Email List		2

Close window and review your changes, now listed under **Current Recipients**. In this example you can see the two members of the Email List user group listed. To remove recipients, select desired recipient and click the **Remove Selected Recipient(s)** button. If you are happy with your email list, select **Next** to continue.

Close

✓ Name & Options > ✓ Message > **Recipients** > Review > Finish

Select the type of recipient you would like to add. A new window will open allowing you to select additional recipients for this invitation.

Users  
Groups  
Email Addresses  
Email Lists

**Current recipients**

Search

<input type="checkbox"/>	Email	User Name
<input type="checkbox"/>	admin@checkbox.com	admin
<input type="checkbox"/>	jbaker@checkbox.com	jbaker

**Invitations Wizard: REVIEW**

Review your invitation message, message options, and recipients (if any) to ensure everything is correct. If you are satisfied, select **Finish**.

*NOTE: After you complete the Invitations Wizard your invitation will be created but not sent; you will be given the choice to send it immediately or save it to be sent later.*

The screenshot shows the 'Review' step of the Invitations Wizard. At the top, a progress bar indicates the current step: 'Name & Options' (checked), 'Message' (checked), 'Recipients' (checked), 'Review' (active), and 'Finish' (next). A 'CLOSE' button is in the top right corner. Below the progress bar, a message reads: 'Please review your invitation and recipients to ensure everything is correct. After you finish this wizard your invitation will be created but not sent; you will be given the choice to send it immediately or save it to be sent later.'

The main content area is divided into three sections:

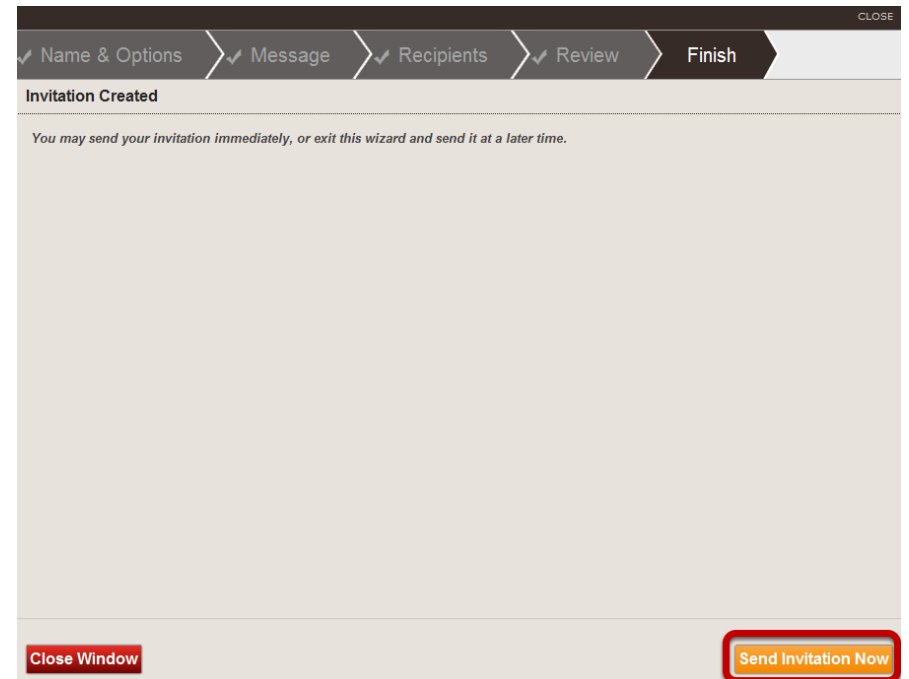
- Message** (Preview Message):
  - From: j.baker@checkbox.com (j.baker@checkbox.com)
  - Subject: Invitation to take a survey at Checkbox® 5.0
  - Message: HTML
- Message Options**:
  - Recipients will NOT be given the option to opt-out of future emails about this survey
  - Recipients will be automatically logged in to the survey if applicable
- Recipients** (Review Recipient List):
  - Your invitation will be sent to 2 email addresses

At the bottom, there are three buttons: 'CANCEL' (red), 'PREVIOUS' (orange), and 'FINISH' (orange with a red border).

## Invitations Wizard: FINISH

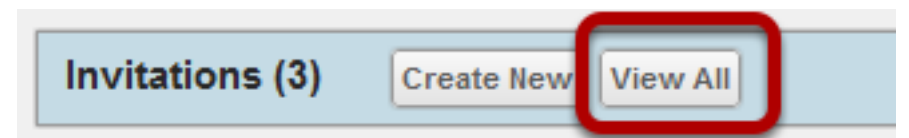
At this point you have completed the process of creating an invitation! You now have the option to send your invitation immediately by selecting the **Send Invitation Now** button, or exiting the Invitations Wizard and sending your invitation at a later time.

*Checkbox Tip: Selecting **Send Invitation Now** will instantly send your invitation to your recipient list. Before sending, double check that your email message, options and recipients are correct.*



## Invitations Manager

At any time after an invitation is sent you have the ability to view the status of your invitation within the **Invitations Manager**. To enter the Invitations manager, select **View All** in the Survey Dashboard under Invitations.



From the **Invitations Manager** you have the ability to view the status of recipients, view responses, modify your invitation message, invite additional recipients, view pending recipients, send a reminder to recipients, or delete your invitation.

You are now in the **Invitations Manager**. To view the status of invitation recipients:

1. Select the invitation you wish to view the recipients of.
2. Select **View All** under Recipients.

**Customer Feedback Survey**  
Invitation to take a survey at Checkbox® 5.0

Options Message Invite Additional Recipients Send to Pending Recipients Send Reminder Delete

**Message**

Format: Html  
From: jbaker@checkbox.com <jbaker@checkbox.com>  
Login Option: Automatic Login  
Allow Opt Out: No  
Subject: Invitation to take a survey at Checkbox® 5.0  
Body: You have been invited to take the survey: Customer Feedback.  
[Click here](#) to take the survey.

**Recipients** View All

Pending: 2 Responded: 0 Not Responded: 0 Opted Out: 0

**Recently Sent Invitations**

No recipients found that match filter.

**Responses** View All

No invitation recipients have responded to the survey.

**Invitations - Customer Feedback** RETURN TO MANAGER CLOSE

Sort by DateCreated ▲ Delete Invitation(s)

Id	Name	Created By	Date Created	Last Sent
<input type="checkbox"/>	1000	Customer Feedback	admin	2011/09/20 16:28:51
<input type="checkbox"/>	1001	Customer Feedback	admin	2011/09/20 16:47:33
<input checked="" type="checkbox"/>	1002	Customer Feedback	admin	2011/09/22 16:25:01

**Customer Feedback Survey**  
Invitation to take a survey at Checkbox® 5.0

Options Message Invite Additional Recipients Send to Pending Recipients Send Reminder

**Message**

Format: Html  
From: jbaker@checkbox.com <jbaker@checkbox.com>  
Login Option: Automatic Login  
Allow Opt Out: No  
Subject: Invitation to take a survey at Checkbox® 5.0  
Body: You have been invited to take the survey: Customer Feedback.  
[Click here](#) to take the survey.

**Recipients** View All

Pending: 2 Responded: 0 Not Responded: 0 Opted Out: 0

**Recently Sent Invitations**

No recipients found that match filter.

**Responses** View All

No invitation recipients have responded to the survey.

## View Recipients

Once you select **View All**, you a window appears displaying your recipient list. This list can be filtered (using the **Filter** drop down) by whom has responded, whom has not responded, or whom has opted out. When you are finished with this screen, close the window to return to the **Invitations Manager**.

User Name	Last Sent	Status	Messages
admin		Not Sent	0
jbaker		Not Sent	0