

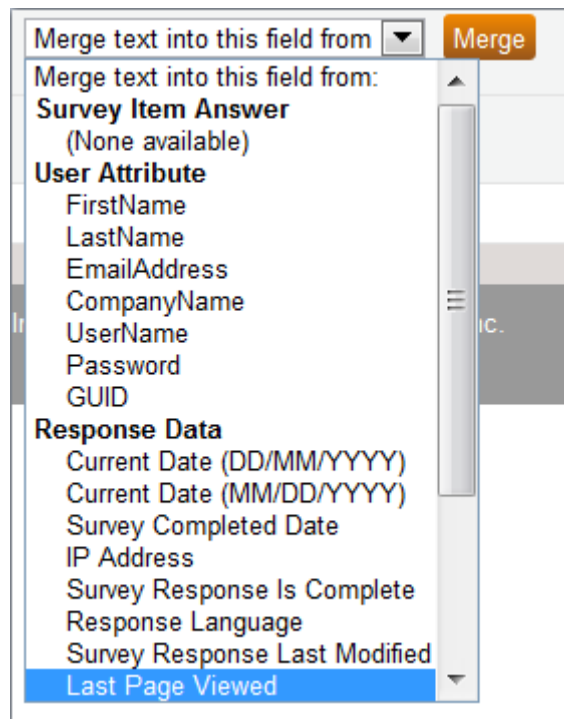
Checkbox 5 Text Merge Guide

This guide will show you the different ways in which you can use the Text Merge feature to personalize your survey and email invitation content.

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Text Merge Sources



You can merge text into questions and email invitations from various sources, including:

- **Survey Item Answers:** Respondents' answers to previous questions
- **Registered User Attributes:** Profile property attributes such as First Name, Last Name, and Email Address.
- **Response Data:** Information related to the individual survey response, such as IP address,

Current Date, Language, etc.

- **Survey Data:** Survey GUID

How to merge a Survey Item Answer into Message Item text

Preview	Question Text	Description	Behavior	Appearance	Conditions
What is your name? <input type="text"/>					

In this example, we will be merging in a respondent's answer to the open response question, "What is your name?" into the text of a message item on the next page.

NOTE: You can only merge in Survey Item Answers from survey items on previous pages.

The screenshot shows the SurveyMonkey editor interface. At the top, there are tabs for 'Preview', 'Edit', and 'Conditions'. The 'Edit' tab is selected and highlighted with a red box and a circled '1'. Below the tabs, there are 'HTML' and 'TEXT' buttons. A rich text editor toolbar is visible, followed by a text area containing the message: "Thank you for entering your name, XXXXXX." A red arrow points to the 'XXXXXX' placeholder, which is also circled with a '2'. At the bottom of the editor, there is a 'Path:' dropdown menu showing "1.1 What is your name?" and a 'Merge' button. A red arrow points to the 'Merge' button, which is also circled with a '3'.

The next page contains a Message Item. The text in this item reads :Thank you for entering your name, XXXXX." We will apply merging here to replace these exes with the respondent's name entered on the previous page.

Follow the steps below to complete this text merge:

1. Select Survey Item. Open the **"Edit"** tab if you are in a Message Item. Open the **"Question Text"** or tab if you are in a Question Item.
2. Select in the text box where you wish to merge in text
3. From the **Merge Drop-Down**, select a source. In this example, our source will be a Survey Item Answer, because we wish to merge in the answer to a previous question. The question we will choose as our source value is "What is your name", which is the question asked on the previous page.
4. Click the **"Merge"** button to insert the **Source Value Code**

NOTE: Follow the steps above to merge Survey Item Answers into most Checkbox Question Items.

Thank you for entering your name @@001185.

Once the **"Merge"** button is selected, a **Source Value Code** is inserted into the item text.

The **Source Value Code** is the place-holder for the source value you selected from the merge drop-down menu. Only the survey creator/editor will see this code. This code should automatically fill in with whatever that source value is (the user's name, in this example) when the survey is being responded to. Always test your merging logic before making your survey live to respondents.

4. What is your name?

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Test Survey:

In this example, "Jessica" was entered as the answer to the question "What is your name?".

Thank you for entering your name **Jessica.**

<< Back

Finish

Once the respondent continues to the next page in the survey, their answer to "What is your name?" is then merged into the text of the message in place of the source value code that was inserted in the Survey Editor. The source value code has automatically filled in with "Jessica".

How to merge a User Attribute into an Open Ended Text Items

Preview	Question Text	Description	Behavior	Appearance	Conditions
	What is your name?				
	<input type="text" value="Default Text"/>				

Open Ended Single-Line and Multi-Line Text Items allow you to insert **default text**.

Default text is text that you can add to an Open Ended Text Item in the Survey Editor, and is then pre-populated into that item's text field when a respondent reaches that item in the survey. The default text can then be left alone, deleted, or modified by the respondent.

Preview	Question Text	Description	Behavior	Appearance	Conditions
	What is your name?				
	<input type="text" value="@@FirstName"/>				

Text Merging can be used to insert a source value as the default text of an Open Ended Text Item. In this example, we will merge a User Attribute (also referred to as a Profile Property) into a Single Line Text Item to display as the default text to respondents. Specifically, we will merge a respondent's first name directly from their profile in Checkbox's User Manager.

NOTE: User Attributes can only be used as the source for merging when a respondent has a user profile (requires a username and password) within your account's User Manager.

2.1 - What is your name?

Export Activate/Deactivate Item Move/Copy Delete

Preview Question Text Description **Behavior** Appearance Conditions

Answer Format: **1**
None ▾

Answer is Required

Alias

Default Text
 2

Max. Length

2.1 What is your name? ▾ Merge **4**

Question
2.1 What is your name?
2.2 Thank you, @@001190. What is your time zone?
2.3 What is your favorite season?

Profile
CompanyName
Email
FirstName **3**
GUID
LastName
Password
UserName

Response
Current Date (DD/MM/YYYY)
Current Date (MM/DD/YYYY)
Survey Completed Date
Invitee
IP Address
Survey Response Is Complete
Response Language

Follow the steps below to complete this text merge:

1. Open the **"Behavior"** tab
2. Select in the Default Text box
3. From the **Merge Drop-Down**, select **FirstName** under the **Profile** source category. This profile label will pull the user's first name directly from their user profile in the User Manager.
4. Click the **"Merge"** button to insert the **Source Value Code** (@@FirstName)
5. Save your changes

Preview	Question Text	Description	Behavior	Appearance	Conditions
What is your name? @@FirstName					

Saving your changes will return you to the Preview tab in the Survey Editor. You should see the source value code appear in the text field as default text.

Make sure you are logged in when you test this merging logic. You should see your name appear as the default text

Profile Properties - admin CLOSE

Profile properties

Enter the user profile properties. All fields are optional.

FirstName	<input type="text" value="Jaimee"/>	←
LastName	<input type="text" value="Baker"/>	
CompanyName	<input type="text" value="Checkbox"/>	

Before testing your merging logic, go into the User Manager and into your user profile to make sure your name is entered in the FirstName text field. This is the data source the merged source value code (@@FirstName) refers to.

What is your name? Jaimee

Test Survey:

Make sure you are logged in when you test this merging logic. When you reach the survey item

that you added the merging logic to, you should see your name appear as the default text in place of the source value code.

How to merge a User Attribute into an Email Invitation

The screenshot shows the 'Message' tab of the email editor. The 'Subject' field is populated with '@@CompanyName Please Take our Customer Feedback Survey'. A red circle highlights '@@CompanyName' and a red arrow points to a 'Merge' button. The 'Message' body contains the following text:

Dear @@FirstName,

Thank you for your business and for shopping at Bob's Bikes! Your feedback is important to us. Please take a moment to tell us about your most recent shopping experience by completing the satisfaction survey below.

[Click here](#) to take the survey.

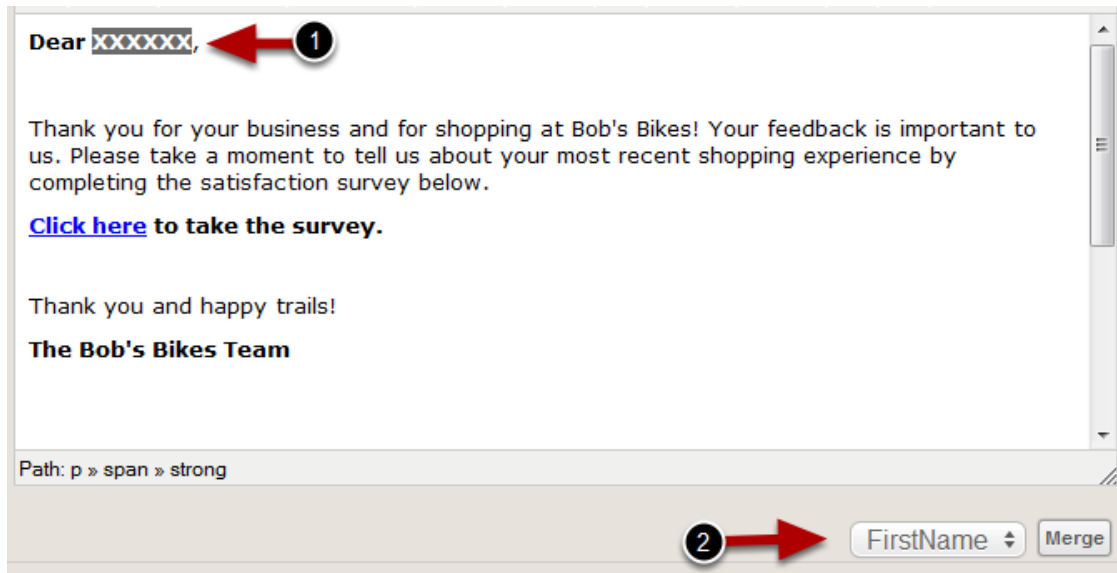
Thank you and happy trails!

The Bob's Bikes Team

Path: p » span » strong

At the bottom right, a red arrow points to a 'Merge' button next to 'FirstName'.

User Attributes and **Survey Data** can be merged into the subject line or message body of email invitations.



Open an email Invitation message and follow the steps below to complete this text merge:

1. Select in the message body text box where you wish to merge in text
2. From the **Merge Drop-Down**, select a User Attribute or Survey Data and click the **"Merge"** button to insert the Source Value Code.

In the above example, we wish to merge in a Checkbox registered user's first name into the salutation.

NOTE: Merging in user attributes will only fill in with pre-registered user information. If you are deploying an invitation to an Email List (no login credentials required), not a Checkbox User or User Group, there will be no user data to merge into the email and the source value code will be left blank.

Thank you for viewing this Checkbox User Guide. [Click here to return to Checkbox Resources](#)