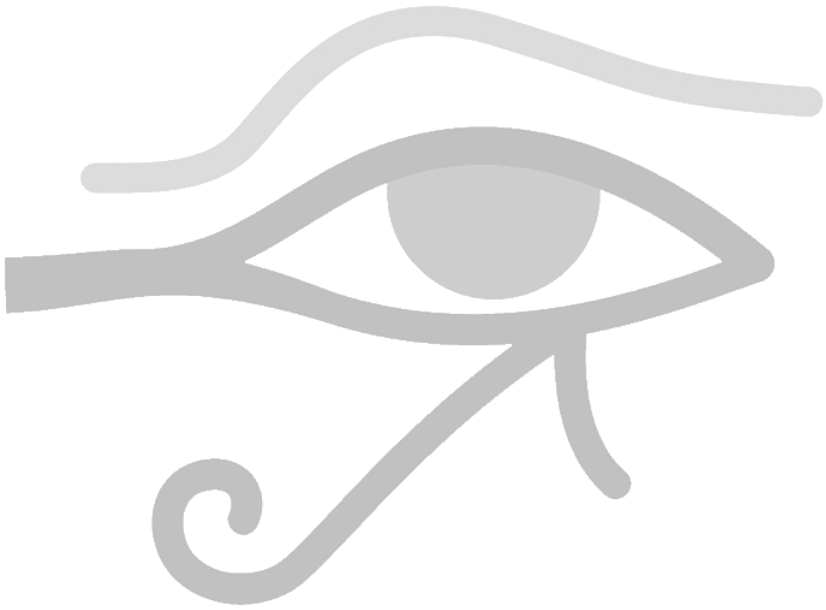
SphinxOnline



User manual

Module " Emailing "

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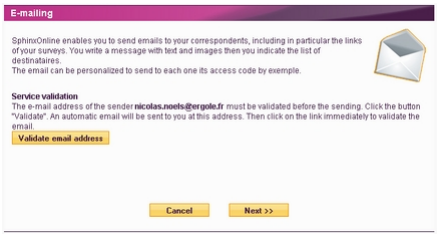
The **e-mailing** tool integrated in the SphinxOnline platform allows you to send hundreds or thousands of e-mails to correspondents quickly, particularly to have them answer a survey.

Context of use

Its use is quite simple; e-mailing may be done in but a few minutes.
There are three steps: writing the message, preparing the list of recipients, and the e-mailing itself.
E-mails may be personalised, formatted (font, colour, size…), enriched with images…
There are numerous options, allowing you to follow up, program e-mailings, learning who responded to what, who read the e-mail, who started to answer without completing the task …
Note that you may also view the surveys you have published using the Windows version of the Sphinx software installed on your computer. These surveys are indicated by a small screen.

Validating the use of the e-mailing service

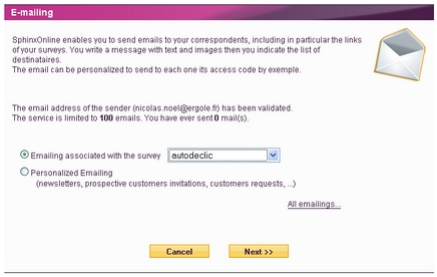
This operation, which is ethically necessary, needs only be performed once before you start using the service. The e-mail address indicated when creating the account will be used as the sender's address in your e-mails, and must be confirmed.
Click on the **E-mailing** link in the left-hand box of SphinxOnline to reveal the following dialogue.



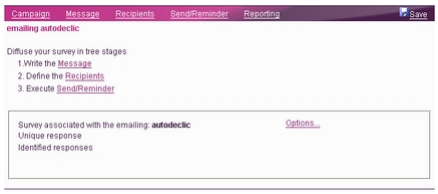
Click on the **Validate e-mail address** button, then go to your e-mail software. An automatic e-mail has just been sent to you (you may have to wait a few minutes).
Click on the link contained in this e-mail to validate the service.

Accessing the e-mailing service

Access to the e-mailing service is then obtained either through the generic **E-mailing** link in the left-hand box of SphinxOnline, or through the **e-mailing** link found in the environment of each survey (in the **Deployment** tab for surveys made directly on line).
If you access the service using the link on the left, you must first indicate the survey associated to the e-mailing.
The **Personalized E-mailing** option allows you to perform e-mailings with no associated survey, and is described further on.



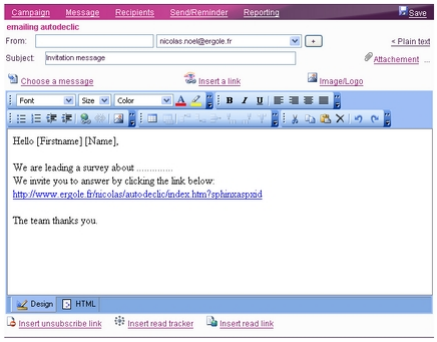
The three steps



These three steps are writing the message, preparing the list of recipients, and the e-mailing itself. The links in the command bar grant you direct access. You may either choose to write the message or prepare the list of recipients first, whichever suits you best. Remember to save modifications to your e-mailings. However, such backups are automatic during the e-mailing.

Writing the message

A default, predefined message is suggested. The **Choose a message** function, described further on, allows you to select a different predefined message or a message used previously, or to upload an html file from your hard drive.



The various parts of the message

As with any e-mail, a message includes its sender, the object of the message, the text of the message and, where applicable, an attachment.
The sender's address (see below on how to change it) may be associated with a name or title, e.g. "Quality Department", "John Smith", or "The Free Morning – Readers' Panel". That is the name your correspondents will see in the inbox of their e-mail software.
The object of the message is equally important, as this will determine whether your correspondents actually open or delete your e-mail.
The text of the message contains a line of greetings, which may be personalised with the name of the correspondent – see below), an explanation of the context, a link to the survey (explicit or implicit), an expression of gratitude, a signature, and attached links (e.g. for unsubscribing).
This message may be "Text only" or "html format", which allows formatting options. Most e-mail software permits html messages to be read.
An attachment may be added to the message if needed.

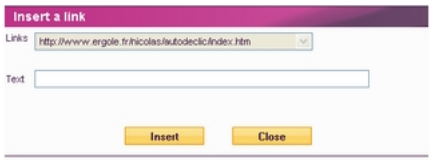
Changing the sender's address

The sender's address is the one indicated when the account is created. This address may be changed using the **Modify your profile** function in the left-hand box of SphinxOnline. If you change this address, the service confirmation operation must be repeated.
To facilitate e-mailing for a generic address e.g. return@mycompany.com, you can add sender addresses which will be available from a dropdown menu.

Only a system administrator can add sender addresses (only Le Sphinx Developpement for shared servers).
Note that this is the inbox that will receive the return e-mails (from correspondents who will have answered from their e-mail software). However, error (undeliverable) e-mails will return directly to the server and will not clog up the sender's inbox.

Inserting a link to the survey

The default message already contains a link to the survey, which looks like this: http://www.sphinxonline.net/moncompte/monenquête/questionnaire.htm?sphinxaspxid
"sphinxaspxid" is a keyword which will be replaced during the e-mailing by a unique identifier for each correspondent.
You may choose to hide this identifier within a link, e.g. "click here" or "questionnaire".
Delete the link line from the message, then click on **Insert a link.**.



Indicate the text which will appear as a hypertext link in the message.
For advanced use, when a number of shortcuts are available, you can choose the right one from the dropdown menu.

Inserting a merge field

Merge fields are the portions of text placed between [brackets]. They must correspond to columns in the list of recipients.
If your list of recipients does not include the first and last names of your correspondents, delete the text "[first name] [name]" in the default message.
If your file of recipients contains another "courtesy" or "establishment" column, you can add the merge field by placing it between brackets.
And if your list of recipients is already set up, you will find, above the message, a dropdown menu allowing you to insert these merge fields directly.

Enriching the message

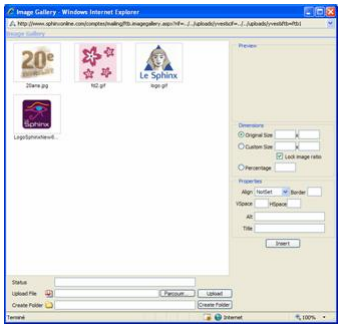
Using the format bar

Nearly all e-mail software process messages in html format, so you can use formatting functions.
Use the toolbar buttons to format the text, particularly by boldface, colour or cap certain portions.

In some cases, you will have to structure your text suing the **table** toolbar.

Inserting an image/a logo

You can insert an image or logo in the e-mail. Click on **Image/Logo**, then select one of the images in your library.



To add an image to your library, click on **Browse** to locate the image file on your hard drive, then on **Upload**.
Be careful with the size and “weight” of these images. Downsizing images often degrade them, and if they are over a few kilobytes in size, your correspondent will be penalised.
The best solution is to take an image already found on a website, as it will have been created in the right size and format by whoever designed the site.
You need also to be aware that most e-mail software are configured not to display default images, and that the user must perform some action to make them appear.

Careful with Cutting and Pasting

You can copy elements from a word processor and paste them in the message editor. We do wish to draw your attention to two points :

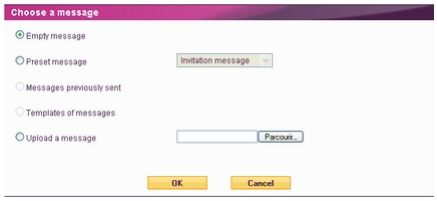
- Images pasted in this mode will not appear, at least, they won’t appear on your correspondents’ screens, because they, unlike you, do not have these images on their hard drives
- Any text pasted in this mode will include “tags” which are specific to the word processor, which will spoil the message and may even make it unreadable if your correspondents do not have the same operating system or browser.

In most cases, messages are short and you can retype them. You can also use a “notepad” to paste the text, which will then lose all formatting, and then recopy it to paste it into a message.
You can also use the function of uploading a file from your disk (see the section on “Choosing a message”).

Editing the HTML code

VERY advanced users may use the HTML tab, below the message, to reveal the HTML code associated to the text and modify it.

Choosing a predefined message



You can either choose to modify the suggested default message or select a predefined message.
The system offers standard messages for an invitation, a follow-up and an acknowledgment.

You can also reuse a previously sent message, or select a sample message.
Also, in the case of an e-mailing which required a number of mailings, you can reuse one of the messages sent previously.
The message may also have been prepared using another software, in which case it is already on your hard drive. Click on **Browse** to select the message file, then on **Upload**.
The file is either a simple html file (without any images), or a zip file containing the html file and all the images.
Messages uploaded in this mode will be added to your library in the **Message Template** for future reuse.

Inserting a follow-up check

Under the message area are three additional functions to insert elements into the message

Unsubscribe link

This link allows a correspondent to indicate he/she no longer wishes to receive e-mails from this SphinxOnline account. The link appears in the default message and we suggest you leave it there (in compliance with the CNIL's recommendations). These recommandations of the CNIL, as well as the terms of use of the service, can be accessed from the "Sending the e-mails" step.

Read tracker

To know whether the e-mail has indeed been read, you can insert a link which will tell our server whether the e-mail has been read. This link will only work if the e-mail software authorises the display of images, which is not always the case. Statistics on "reading percentages" (see the section on "Campaign summary") should therefore be taken with a grain of salt.

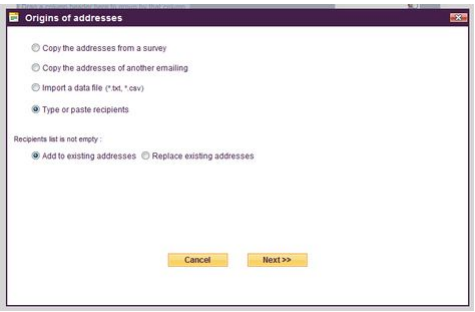
Web-reading link

If the message includes a complex format and contains many links and images (such as in an informative letter), the e-mail software may not display it correctly. The reading link, which should appear at the top of the message, will send the message to be opened by the Internet browser.

Preparing the list of recipients

The Recipients link shows the current list as well as Add addresses and Modify/Delete links allowing you to prepare it.

Adding addresses



Copy/Paste

The simplest way is to open your e-mail database (perhaps an Excel file), selecting the addresses, then pasting them in the list edition area.

Reusing an address list

If one of the surveys in your account contains an e-mail variable, you can import all the addresses found in the response file by selecting **Copy the addresses from a survey**.
You can also recover the list of e-mail addresses used in a previous e-mailing by selecting **Copy the addresses of another e-mailing**.

Importing a file

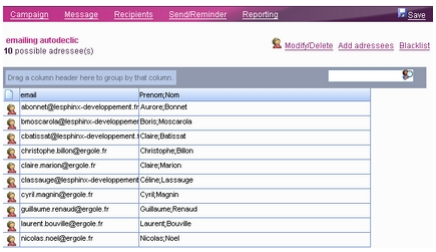
You can also indicate a file containing the addresses. This file must be in text format (tab or semicolon separators) or in csv format.
Click on **Browse** to select the file on your hard drive, then click on the **Upload** button.
During the creation, repeat entries are ignored, as are obviously incorrect addresses.

Address syntax

Addresses must be complete and include no character other than the e-mail address itself.
Lines like “John Smith” are not valid. An address may have additional information, such as the first and last names, the form of address, or any other characteristic.
This information (or merge fields) must appear on the same line as the e-mail address, and must be separated by tabulations or semicolons.
If there are merge fields, the first line must include the name of these columns (e-mail for the address).
Here is an example of a file which is ready to be imported:
e-mail;Firstname;Name
abonnet@lesphinx-developpement.fr;Aurore;Bonnet
ahazebrouck@lesphinx-developpement.fr;Aurélie;Hazebrouck
bmoscarola@lesphinx-developpement.fr;Boris;Moscarola
classauge@lesphinx-developpement.fr;Céline;Lassauge
cmigaux@lesphinx-developpement.fr;Christelle;Migaux
cpourrier@lesphinx-developpement.fr;Christine;Pourrier
christophe.Billon@ergole.fr;Christophe;Billon
cbatissat@lesphinx-developpement.fr;Claire;Batissat
claire.marion@ergole.fr;Claire;Marion
crodi@lesphinx-developpement.fr;Colette;Rodi
cyril.magnin@ergole.fr;Cyril;Magnin
gporte@lesphinx-developpement.fr;Guillaume;Porte
guillaume.renaud@ergole.fr;Guillaume;Renaud
jmoscarola@lesphinx-developpement.fr;Jean;Moscarola
laurent.bouville@ergole.fr;Laurent;Bouville
scaglar@lesphinx-developpement.fr;Serpil;Caglar
stephane.ganassali@univ-savoie.fr;Stéphane;Ganassalli
thibaut.pappini@ergole.fr;Thibaut;Pappini
yproteau@lesphinx-developpement.fr;Yoann;Proteau
yves.baulac@ergole.fr;Yves;Baulac
zblanc@lesphinx-developpement.fr;Zélie;Blanc
Such merge fields are useful for two reasons:

- The information may be used to personalised the e-mail, which may then begin with “Good Morning” [form of address] [name]
- This information is recorded in the survey if it has variables with the same name. Please note that the e-mail address is a default merge field. All you need to know who answered what is an e-mail variable in the survey.

Modifying/Deleting/Adding addresses



The list of addresses can be modified at any time. For example, you can:

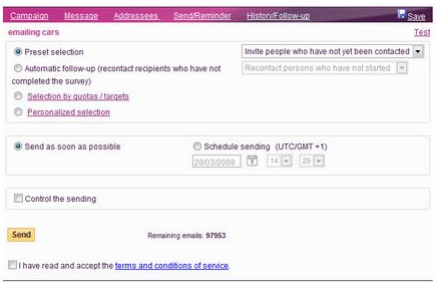
- Add addresses periodically and repeat a mailing exclusively for added addresses.
- Modify an incorrect address
- Delete incorrect addresses (recipient cannot be reached)

A log of mailings made to deleted addresses will also prove to be useful, so they are no longer considered in the statistics.

Blacklist

The system keeps a list for each account of those persons who've asked not to receive any more e-mails. This list is fed directly by your correspondents when they click on the unsubscribe link.
However, this list may also be corrected manually.

Carrying our a mailing



One of the very powerful functions of SphinxOnline's e-mailing tool is to allow a number of repeat mailings, whether as a follow-up, because addresses have been added, or to send a link to the results.

Conducting a test

We wish to stress the very real need to conduct a test prior to launching an e-mailing. There are many possibilities of some error having been committed during the parameterisation.
In a mailing page, click on the **test** button and indicate one or more addresses (up to four) along with any required merge field.
This way, you can verify (and have someone else verify) that the e-mail is complete (sender, object, text) and that the survey is proceeding normally.

Choosing a selection mode

Once the tests have been performed, you can proceed with the e-mailing.
All that remains to be done is to select the addresses from the list which will be involved in your mailing.
The default option is the one most often used, the e-will be sent only to those people who have not previously been contacted.
The other "Automatic Selection" options are:

- To those people who have yet to respond to the survey: this is a follow-up, and the message will have been appropriately rewritten.
- To those persons who have responded; in this case, it would be a message of acknowledgment, perhaps granting access to results.

To all recipients; in this case, it might be details which were omitted from the first message.
Furthermore, you can carry out a personalised selection by selecting directly from the list the persons to be contacted. This method is an alternative to the Test itself; a select, reduced group of correspondents is to be contacted to verify that everything is working properly before contacting the others.

Programming a mailing

Generally, a mailing will go out as soon as possible, which does not necessarily mean immediately, as many mailings may have been launched from other accounts, some e-mails take longer to route and slow down the overall process …
You can also program the mailing, i.e. indicate a specific date and time for it to start.
This way, you can program sending the invitation to answer a survey and the mailing (programmed for a week later) of a follow-up for those who, at such a time, may not have responded yet.

Advanced functions

Regulating mailings

If a large number of correspondents are contacted within a single organisation, it may be necessary to regulate the mailings so as to avoid overloading the organisation's e-mail server and, most important, to avoid having your e-mails classified as spam.
The default regulation option default is to wait 30 seconds between each packet of 100 e-mails, an option you may modify after having discussed it with the systems department of the organisation you are contacting.

Modifying a mailing

If a mailing has been programmed, you may have to "deprogram" it. In the **Reporting** page, the list of mailings allows you to block a mailing, e.g. to modify the message.
If a mailing must be reprogrammed for another date to another selection of recipients, you must delete the mailing and create a new one.

Automatic insertion of variable

If the link **Automatically add to the survey…** appears on the mailing page, it means the columns in your recipient file (e.g. e-mail;name;first name) do not correspond to any variable in your survey. If you want to, this function will allow you to add the proper variables to your survey automatically. A warning, though: you won't be able to cancel this action.

Checking the answers to a survey

One-time or repeat responses

The default setting authorises only a single "one-time response" per recipient. In this case, when the recipient clicks on the link to the survey, the system checks whether he/she has already answered; if so, a "Your response has already been recorded" message will appear instead of the questionnaire.
Please note this option means a correspondent cannot respond and then forward the e-mail to his/her colleagues, for example.
If you wish to take this protocol into consideration, you must then allow repeat responses, as many people will respond under your correspondent's identity.
In the **Campaign** page, an **options** button allows you to select **Multiple responses**.
You can also modify the anonymity of responses.

Responding in multiple sessions

The third option in the previous dialogue box, **Unique and modifiable response**, allows the following protocol to be applied :

- Answers are recorded each time the page changes
- If the recipient reloads the link from the e-mail, he/she will be redirected to the last page visited.
- The Previous Page button (if it appears on the form) will allow the recipient to go back to the beginning
- Once the answer is completed (The recipient has clicked in the Send button on the last page), he/she may not go back to his/her answer.

Statistics under this protocol are not entirely trustworthy. Actually, the survey will contain observations that are only partially completed (from those persons who quit after the second page). However, the advantage is that no information will be lost, since all pages visited will result in a record.

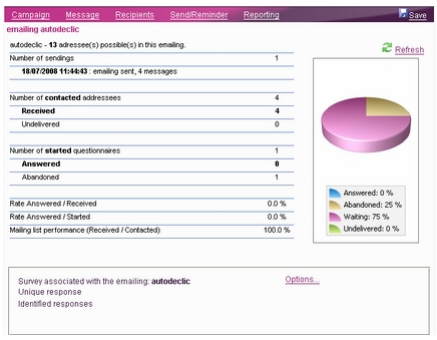
Who answered what?

To know “who answered what”, the survey must include a variable allowing you to identify the person who is responding. This variable may be a variable (of the open-text kind) with “e-mail” as a variable name, or one or more variables with variable names consisting of the “merge fields of the recipient file.
You can apply the following protocol, for example: the list of recipients from this very company contains the e-mail and the corresponding “department”.
The survey includes the “departement” variable.
Reports accessible on line may, without any intervention, offer to produce reports broken down by department, and even comparing the various departments to each other.

Following up the progress of the campaign

Summary of the campaign

Once at least one mailing has been made for an e-mail, the home page (click on Campaign to find it) will show you a statistical summary.



This will include indicators on return rates and the quality of the list of recipients.
Error notifications (improperly constructed e-mail, non-existing recipient account, unknown server, full inbox, rejected message) are sent directly to the server, which shows a number and an error rate in the summary.
Be aware that these change over time, as a notification from a remote e-mail server may come many hours after it has been sent.

List of mailings

This list shows you all the mailings which have been sent or are programmed.
You may modify this list to:

- Pause an e-mailing in progress or one which has been scheduled to modify the message
- Delete a mailing set up by error

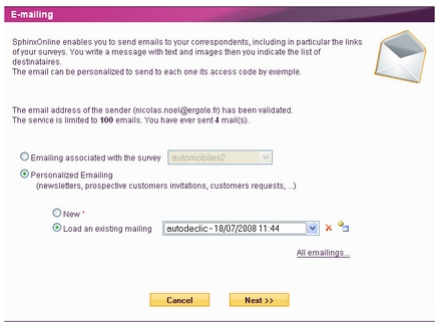
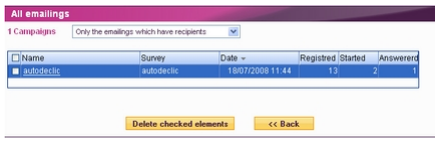
- Delete a mailing which corresponded to a test, so that it will not affect the statistics

List of recipients

This list shows all the recipients in the list, along with a log of the mailings made (one column per mailing) and this recipient's status, which may be: Sent, Read, Error, Started, Responded.
This list may be exported, e.g. to qualify another database.

Personalised e-mailings

This e-mailing tool, while it is particularly suited to gathering survey data, may be used independently of any survey to send informative letters, contact ones actual or prospective clients …
To create such an e-mailing, use the **E-mailing** in the left-hand box of SphinxOnline, then select the **Personalized E-mailing** option.
As the case may be, you will either create a "New" e-mailing, which must be given a "Name", or you will select "Reload an existing mailing" in the dropdown menu.
Note that this list also allows you to delete definitely useless e-mailings or to create new mailings (message and list of recipients). Use both icons placed next to the list



If you wish to sort your e-mailings, click on **All e-mailings…**. You can then view all your e-mailings (with or without recipients) and delete those which are useless.