



PARTNER Mail Merge Instructions

If you choose to not send emails to your respondents via the PARTNER system and you do not want to manually send emails to each one, you can send emails by doing a mail merge. Microsoft Word along with Outlook have mail merge features. Using this function, you can send everyone an email with their personalized login link without using our email system.

This document goes through the step by step instructions to send a mail merge.

Instructions to Send a Mail Merge

1) Download the Response Rate Data Sheet by clicking on %Check Response Rate from the Network Homepage.

Mail Merge Example Home

Step 1 Enter Respondent (Network Members) Information

- Download Respondent Information Worksheet
- Load Respondent Information
- Edit Respondent Information

Step 2 Modify Survey

- Customize Consent Language and Instructions

Select Survey To Use

Current Survey [v] [Customize Survey](#)

- Preview Survey
- Print Friendly Survey
- % Check Response Rate**

Step 3 Send E-mails to Respondents

- Manage E-mails

Step 4 Analyze Survey

- View Data Dashboards
- Export Raw Data
- Download the PARTNER Analysis Tool
- Download Network Analysis File

Selected Network: Mail Merge Example

Rename Network

Add Collaborator

2) Click on Export Data on the top of that screen.

Completion Rate: 0%

[Export Data](#)

Login Link	Organization Name	Map Label Name	Org Group Type	First Name	Last Name	E-mail	Status	Completion Rate
	Organization 1	Org 1	School	SARA	Sprong	sara@visiblenetworklabs.com	Not submitted	0%
	Organization 2	Org 2	Health	Jane	Doe	sara@visiblenetworklabs.com	Not submitted	0%
	Organization 3	Org 3	Social Services	Joe	Johnson	sara@visiblenetworklabs.com	Not submitted	0%
	Organization 4	Org 4	School	Devin	Peterson	sara@visiblenetworklabs.com	Not submitted	0%

Selected Collaborative: Mail Merge Example

3) For reminder emails, you need to edit the Excel file so you only send emails to those who have not submitted their survey. Open the exported file, sort by the Status column and delete any rows that have "Submitted" listed in this column.

For invite emails, disregard this step. This step is only for reminder emails. You do not want to send an email to the respondents who have already submitted their survey.

4) Save this Excel file as something easily found, i.e. Mail Merge Example Completion Rates. Adding a date to the file name will help to distinguish from future exports.

5) Open a Word document with the text for the email you want to use.

Below in red is the default language included in the invite in the PARTNER System. You can choose to include this language or something similar.

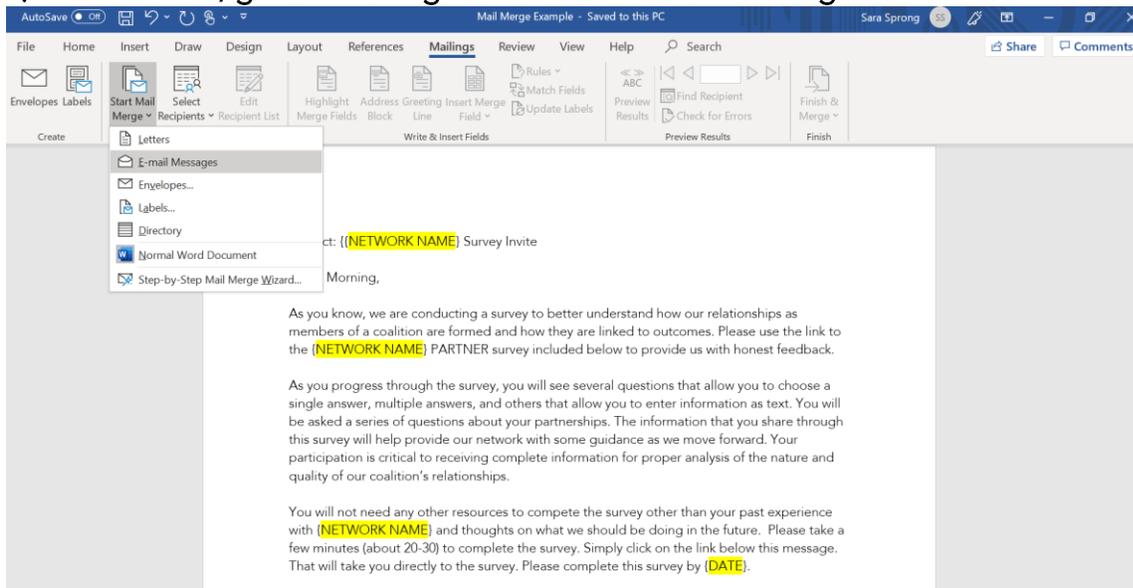
You have been requested to participate in this survey as: %OrgName.

Please go to: %login_url to start the survey.

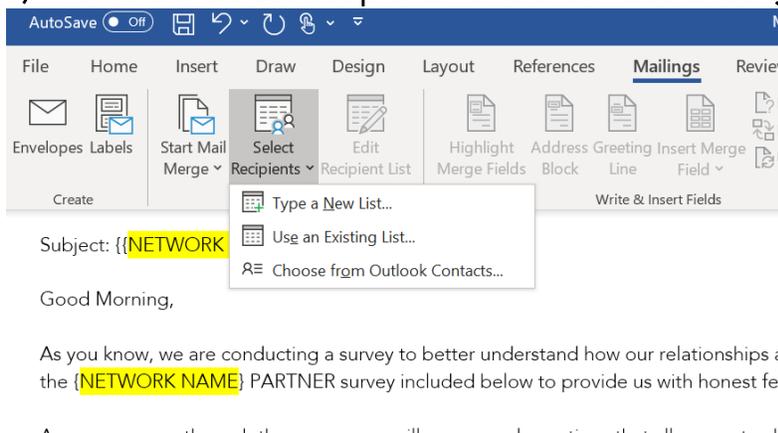
By starting the survey, you are agreeing to participate in this survey.

Thank you for your participation. If you have any questions regarding this invitation, please respond to this email.

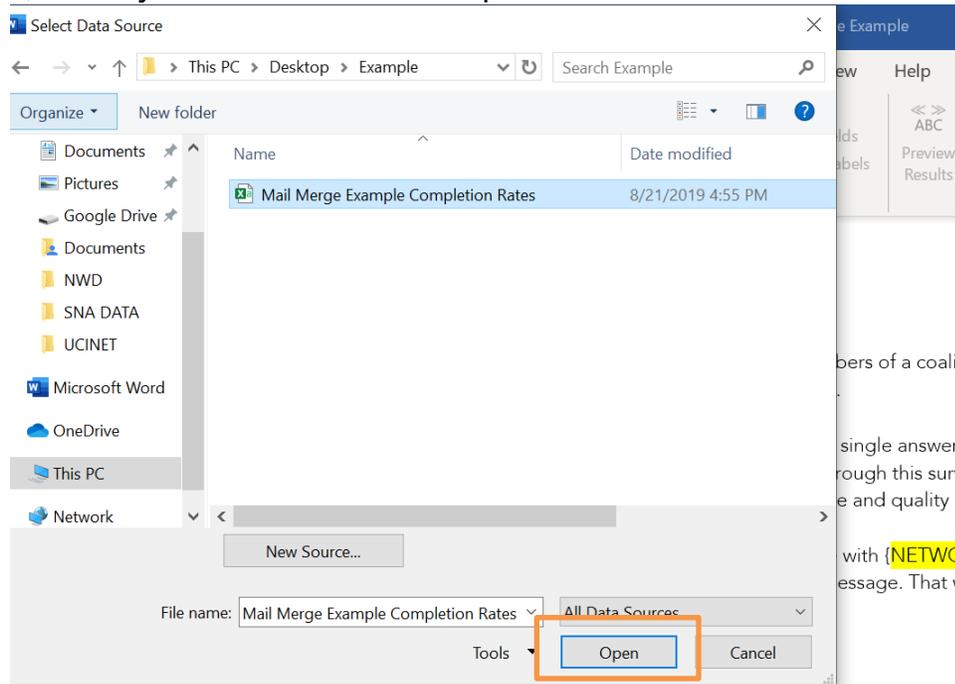
6) Within Word, go to "Mailings" and then "E-mail Messages"



5) Then click "Select Recipients" and click "Use Existing List".



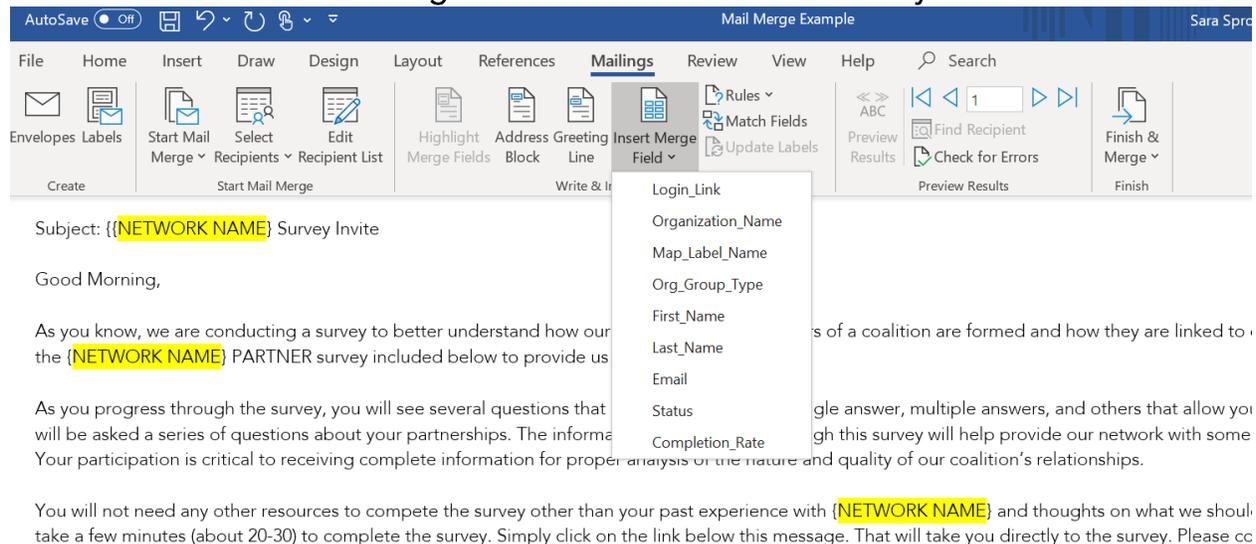
6) Select your file and then click open.



By starting the survey, you are agreeing to participate in this survey.

Thank you for your participation. If you have any questions regarding this invitation, please respond to this e

7) Go to the places within your text that you want to merge with the file you just selected. Click on "Insert Merge Field" and then insert the field you want to insert.



For example, next to Good Morning, say you want to insert First_name. It would look like this:



Subject: {NETWORK NAME} Survey Invite

Good Morning «First_Name»

As you know, we are conducting a survey to better understand how our relationships as members of a coalition are formed and how they are. The {NETWORK NAME} PARTNER survey included below to provide us with honest feedback.

As you progress through the survey, you will see several questions that allow you to choose a single answer, multiple answers, and others that will be asked a series of questions about your partnerships. The information that you share through this survey will help provide our network. Your participation is critical to receiving complete information for proper analysis of the nature and quality of our coalition's relationships.

You will not need any other resources to complete the survey other than your past experience with {NETWORK NAME} and thoughts on what take a few minutes (about 20-30) to complete the survey. Simply click on the link below this message. That will take you directly to the survey.

You have been requested to participate in this survey as: %OrgName.

Please go to: %login_url to start the survey.

By starting the survey, you are agreeing to participate in this survey.

Thank you for your participation. If you have any questions regarding this invitation, please respond to this email.

8) You MUST insert Login_Link into your Mailing before you finish your merge. This is the personalized link for each respondent that they must have to login into the survey. For introductory emails, disregard this step.

If you are using the default language pulled from PARTNER, you will need to replace the %OrgName with the Organization_Name merge field and %login_url with the Login_Link merge field. See below.

Default text:

You have been requested to participate in this survey as: %OrgName.

Please go to: %login_url to start the survey.

By starting the survey, you are agreeing to participate in this survey.

Thank you for your participation. If you have any questions regarding this invitation, please respond to this email.

Default text with Merge Fields:

You have been requested to participate in this survey as: «Organization_Name».

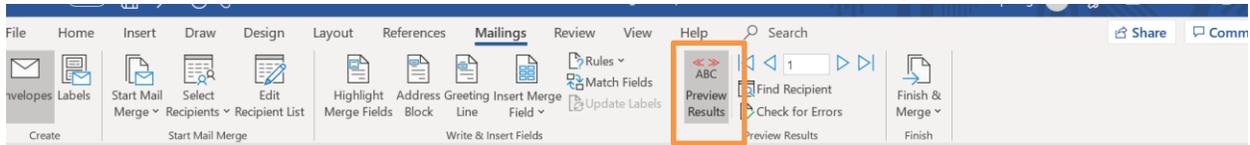
Please go to: «Login_Link» to start the survey.

By starting the survey, you are agreeing to participate in this survey.

Thank you for your participation. If you have any questions regarding this invitation, please respond to this email.

9) You can preview your merge by clicking on "Preview Results".

You can see the merge before sending by clicking through the arrows to the right of the Preview Results button. You can also click auto check for errors.



Subject: {NETWORK NAME} Survey Invite

Good Morning Sara,

As you know, we are conducting a survey to better understand how our relationships as members of a coalition are formed and how they are linked to outcomes. Please use the link to the {NETWORK NAME} PARTNER survey included below to provide us with honest feedback.

As you progress through the survey, you will see several questions that allow you to choose a single answer, multiple answers, and others that allow you to enter information as text. You will be asked a series of questions about your partnerships. The information that you share through this survey will help provide our network with some guidance as we move forward. Your participation is critical to receiving complete information for proper analysis of the nature and quality of our coalition's relationships.

You will not need any other resources to complete the survey other than your past experience with {NETWORK NAME} and thoughts on what we should be doing in the future. Please take a few minutes (about 20-30) to complete the survey. Simply click on the link below this message. That will take you directly to the survey. Please complete this survey by {DATE}.

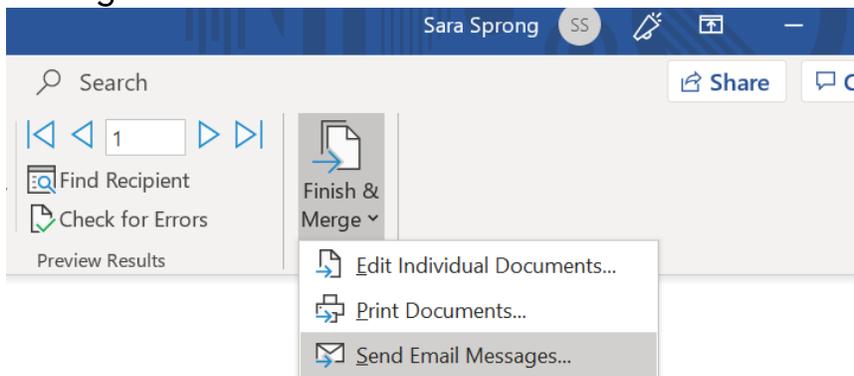
You have been requested to participate in this survey as: Organization 1.

Please go to: https://partnertool.net/survey/new/take_survey.php?user=sara@visiblenetworklabs.com_11&auth=b3d456d737bd729794cb5d3763665eaa to start the survey.

By starting the survey, you are agreeing to participate in this survey.

Thank you for your participation. If you have any questions regarding this invitation, please respond to this email.

10) When you are ready to send select "Finish and Merge" and then click "Send E-mail Messages".



11) Put in a Subject Line and make sure it is pulling from Email (not another merge field) in the "To:" line. Then click Ok and the message will send to all records.

You can choose to send all, the current record, or specific records.

