How to use the Questionnaire Mail Out tool

The Questionnaire Mail Out tool allows users to email questionnaires to their Contacts to complete online. The tool also enables users to monitor responses to the questionnaire and to re-send to Contacts who have not responded.

To create a new mail out for a questionnaire:

- Hover over Evidence and select Questionnaires
- Click on the Mail Out icon to the right of the relevant questionnaire
- Choose the Contact Type that you wish to send the questionnaire to
- Click Next
A list of all contact records of that type (e.g. ‘Participants’) with a valid email address will be displayed. In the Send Email column on the right, you can select which records to send the link to.

To search for specific records, enter a search term in the basic search bar or select the magnifying glass icon to perform an advanced or statistical search.

After selecting the relevant contacts, click Next.

Choose a correspondence template from the list and click Send.

* For information on creating correspondence templates, see the support document How to Create a Correspondence Template available online at https://www.substance.net/wp-content/uploads/How-to-create-a-correspondence-template.pdf
- Each recipient will receive an email with the link to answer the questionnaire

![Email Example]

Hello Johnny,

Please use the link below to answer the questionnaire.

Best wishes,

The Views Support Team

Please click here to answer your Questionnaire

- Clicking on the link will take the person to an online version of the form, which they can then complete and submit

- The completed form will be stored in the Questionnaires section of the Contact’s record on Views

To monitor responses to a particular questionnaire:

- Hover over Evidence and select Questionnaires

- Click on the name of the relevant questionnaire
• Select *Mail Outs* from the tabs on the left-hand side

• A list of the contacts that have received the mail out but have not responded will be listed, along with the date that the mail out was sent and the user that sent this

• To re-send an email to a contact, select the *envelope* icon to the right of their record and then click *Ok*

• To view a list of Contacts that have responded to the link, select the *Answered* tab