

Using Data About Your Contacts in Invite Messages and Surveys

The data uploaded with your contacts will be stored and available in the [Email/SMS Campaign Contact Fields](#) to set up logic in your surveys and to use in filtering in your reports. This data will also be available in your [Individual Responses](#) and will [export](#) with the data collected in your survey.



1. Below is the current contact information that we have for you. Is this correct?



800-609-6480
4888 Pearl East Circle 100W
Boulder, CO

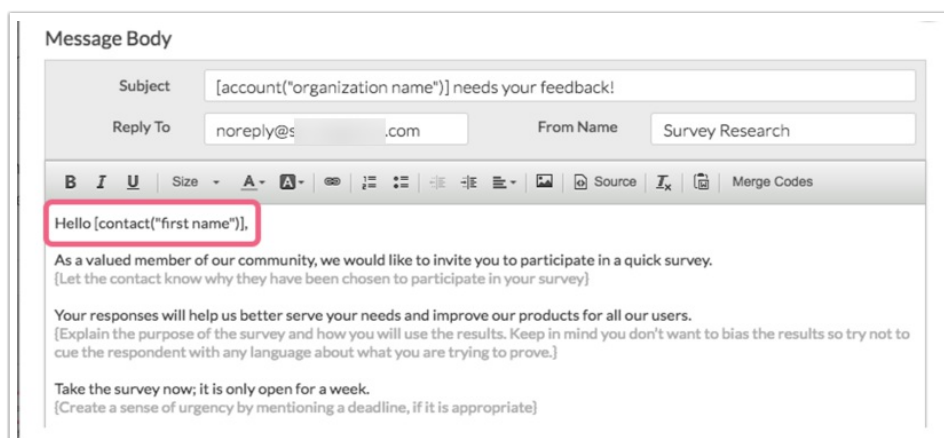
☐ Yes
☐ No

Use Contact Data in Email Invite Messages

Any data uploaded along with your contacts' email addresses can be used in your email campaign invite messages. Say, for example, you upload your contacts' first and last names; you can then personalize the greeting of your invite message with this data using a merge code.

Follow these steps to use data about your contacts to personalize your invite messages.








1. Within your Email Campaign, go to the **Campaign Designer** and edit the message you wish to customize. The default message text already includes the merge code for first name.



Message Body

Subject: [account("organization name")] needs your feedback!

Reply To: noreply@.com From Name: Survey Research

B I U Size **A** **A**       Source  Merge Codes

Hello [contact("first name")].

As a valued member of our community, we would like to invite you to participate in a quick survey.
[Let the contact know why they have been chosen to participate in your survey]

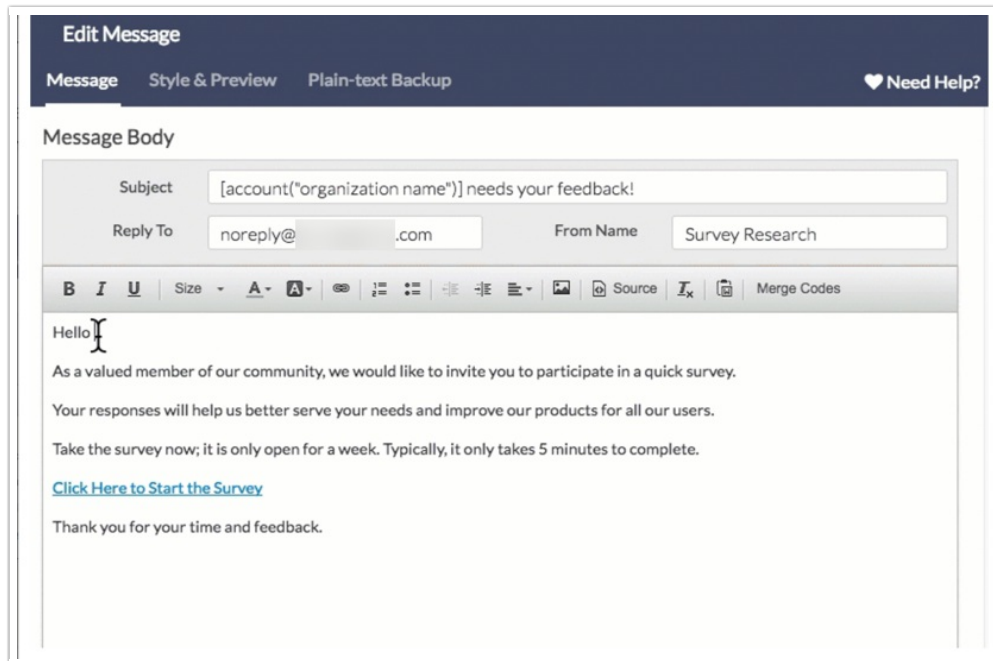
Your responses will help us better serve your needs and improve our products for all our users.
[Explain the purpose of the survey and how you will use the results. Keep in mind you don't want to bias the results so try not to cue the respondent with any language about what you are trying to prove.]

Take the survey now; it is only open for a week.
[Create a sense of urgency by mentioning a deadline, if it is appropriate]

Let's imagine we deleted the default text in order to write our own custom message. To add the first name back...

2. Place your cursor where you wish to insert the contact's first name and, using the **Merge Code** dropdown on the editor toolbar, select the merge code with the data you wish to use.

In the below example, we inserted the merge code for first name in the salutation. This merge code will populate with each contact's first name when they access their unique survey link.



For a complete list of fields available for storing data with email campaign contacts and their associated fields check out the [merge code reference](#).

Use Contact Data in SMS Invite Messages

While Email Campaign messages allow you to use any data uploaded along with your contacts' email addresses in the body of the email message, this is not the case in [SMS messages](#).

SMS messages are limited to 160 characters. Your SMS message allows for using two merge codes:

- `[invite(survey_link)]` - This is a required merge code and will reserve 30 characters.
- `[contact("first name")]` - This is an optional merge code and will reserve 10 characters.

The survey link merge code will be included in SMS messages by default and cannot be removed. If you want to include the `[contact("first name")]` merge code in your message*, follow these steps:

1. Within your SMS Campaign, go to the **Campaign Designer** and edit the message you wish to customize.
2. Place your cursor where you wish to insert the contact's first name and click the **Contact First Name** link below the message. The `[contact("first name")]` merge code will be inserted at the cursor.

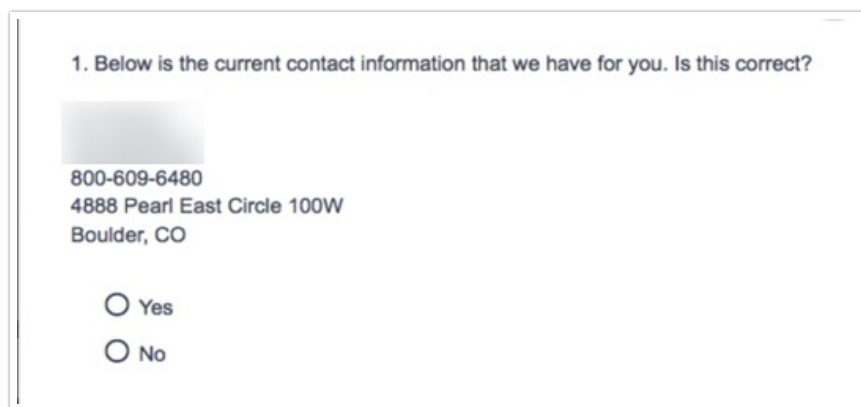


The screenshot shows an 'Edit Message' window. At the top, the title 'Edit Message' is displayed. Below it is a text input field containing the text 'Hi |' followed by a cursor. Below the input field is a preview of the message: 'Please take this survey [link] (survey_link)'. At the bottom of the window, there is a section labeled 'Insert merge code:' with two options: 'Survey Link' and 'Contact First Name'. A red arrow points from the 'Contact First Name' option to the cursor in the message input field. Below the merge code options, a note states: 'Please note that only Contact First Name and Survey Link merge codes are supported in the message field.'

*This limitation applies specifically to the SMS *message* content. If you have uploaded additional contact fields as part of the contact file for your SMS campaign, these fields can still be pulled into your survey and used for reporting purposes.

Use Contact Data in Question Text

You may want to use your contact data in your question text. For example, you can display the current contact information and ask the respondent to confirm that the contact information is correct.



The screenshot shows a survey question: '1. Below is the current contact information that we have for you. Is this correct?'. Below the question is a blurred image of a contact card. The contact information displayed is: '800-609-6480', '4888 Pearl East Circle 100W', and 'Boulder, CO'. Below the contact information are two radio button options: 'Yes' and 'No'.

Follow these steps to use data about your contacts in question text.

1. Place your cursor where you would like to insert the contact information and use the **Merge Codes** dropdown menu.
2. Select the contact data field you would like to display in the question text from the **Merge Codes** helper tool.

In the below example, we inserted the merge codes for all contact information. These merge codes will populate with the specific information for each contact when they access their unique survey link.

MediaLogicLayoutPiping / Repeat

Need Help?

Text or Instructions

Below is the current contact information that we have on-file for you. Is this correct?

What type of media?

☒ Text / Instructions

☐ Audio Player

☐ Video Player

☐ ReadyTalk Video

☐ Image

For a complete list of fields available for storing data with email/sms campaign contacts and their associated fields check out the [merge code reference](#).

Use Contact Data as Default Answer Text

You can also use your contact data as default text. For example, you can display the current contact information in a [Contact Form](#) and ask the respondent to make any necessary changes.

2. Please make any corrections to your contact information:

First Name

Last Name

Company Name

Street Address

4888 Pearl East Circle

Apt/Suite/Office

100W

City

Boulder

State

CO

Zip

80301

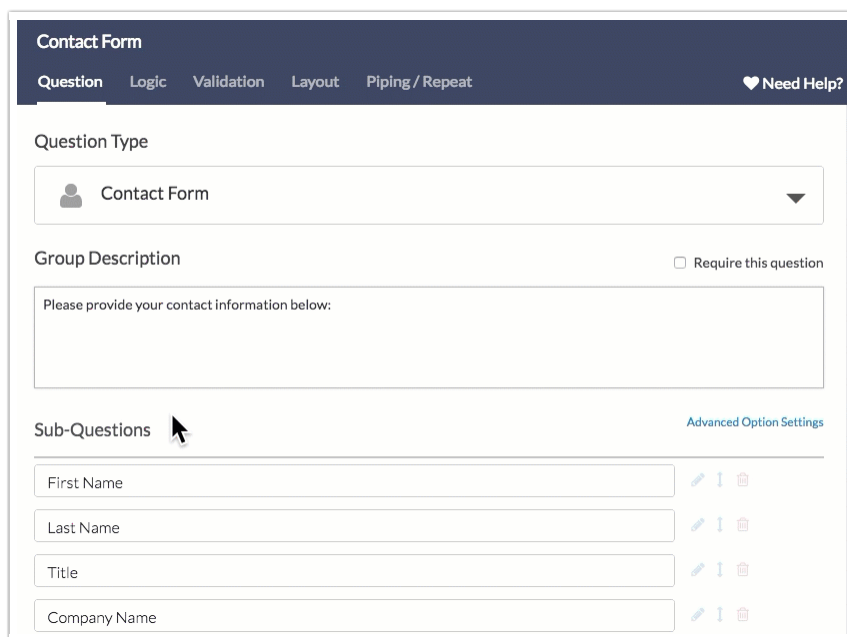
Email Address

Phone Number

800-609-6480

Follow these steps to display contact information as the default answer.

1. Add a [Contact Form](#) question to your survey.
2. Click the pencil icon next to edit the first subquestion and go to the **Layout** tab.
3. Scroll to the **Default Answer** field.
4. Click **Select a Merge Code**.
5. Select the contact data field you would like to display and click **Insert**.



The screenshot shows the 'Contact Form' question editor interface. At the top, there's a dark blue header with the title 'Contact Form' and tabs for 'Question', 'Logic', 'Validation', 'Layout', and 'Piping / Repeat'. The 'Layout' tab is active. Below the header, the 'Question Type' is set to 'Contact Form'. The 'Group Description' field contains the text 'Please provide your contact information below:'. To the right of this field is a checkbox labeled 'Require this question'. Below the description is the 'Sub-Questions' section, which lists four fields: 'First Name', 'Last Name', 'Title', and 'Company Name'. Each field has a pencil icon for editing and a trash icon for deletion. A mouse cursor is hovering over the 'Sub-Questions' header. To the right of the 'Sub-Questions' section is a link for 'Advanced Option Settings'.

For a complete list of fields available for storing data with email/sms campaign contacts and their associated fields check out the [merge code reference](#).

Use Contact Data in Logic

You can also use your contact data in logic rules. There are all sorts of possibilities for setting up logic using contact data. It is a great opportunity to save asking questions that you already know but need to use in logic conditions.

For example, you may have certain questions that you only ask for a certain department in your organization. Since you already know this information upload it to the Department field in your email campaign or contact management and base logic of this field.

Using the custom fields available within email/sms campaigns and contact management the possibilities are endless! Start saving your respondents time by uploading the data you already have!

As a simple example, let's imagine we are sending out a survey to our existing list of customers contacts. We'll also be sharing a link to the survey on our website to collect contact information from new potential

customers. For our existing customers, we set up a question that verifies each respondent's contact information. For new potential customers, this question won't make sense. We can leverage our email campaign contact fields in logic to ensure that this question only displays to respondents for whom we have contact information!



1. Below is the current contact information that we have for you. Is this correct?

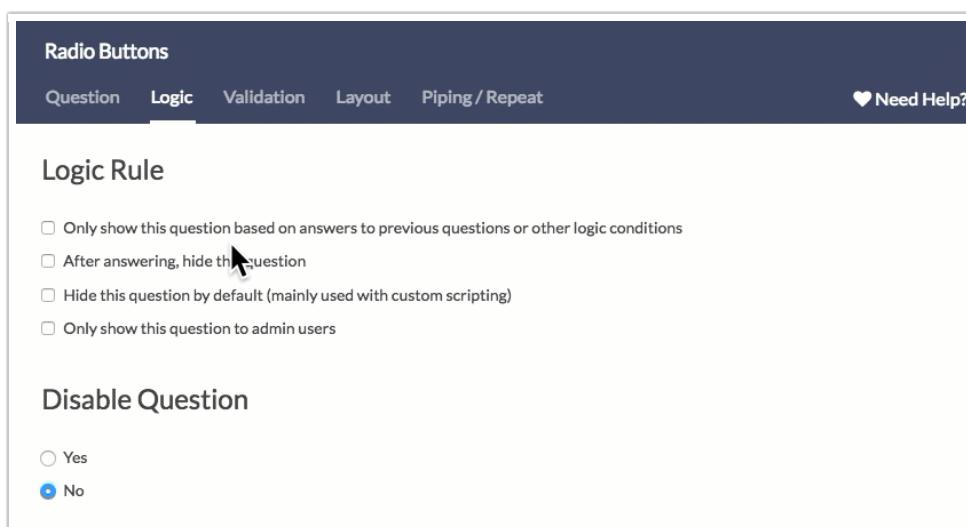
[Redacted]

800-609-6480
4888 Pearl East Circle 100W
Boulder, CO

☐ Yes
☐ No

To set up logic using your contact data follow these steps.

1. Edit your question and go to the **Logic** tab.
2. Select the option to **Only show this question based on answers to previous questions or other logic conditions**.
3. Select the contact field you wish to use to set up logic rules.
4. Next, select the operator and operand to complete the logic conditions. In our example, we chose to display the question only when the email address field "is answered" which means when the field has data.



Radio Buttons

Question **Logic** Validation Layout Piping / Repeat [♥ Need Help?](#)

Logic Rule

☐ Only show this question based on answers to previous questions or other logic conditions
☐ After answering, hide this question
☐ Hide this question by default (mainly used with custom scripting)
☐ Only show this question to admin users

Disable Question

☐ Yes
☒ No

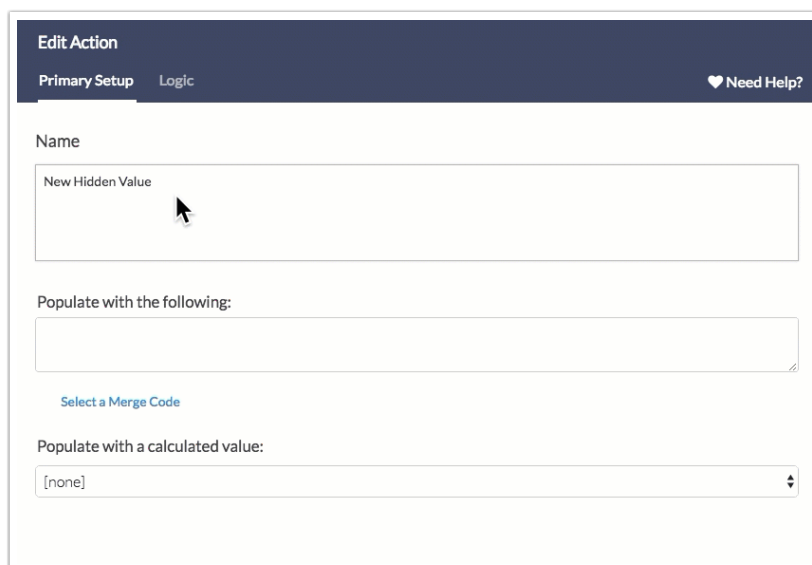
For a complete list of fields available for storing data with email/s, campaign contacts and their associated fields check out the [merge code reference](#).

Use Contact Data in Send Email Actions

If you are using an Email or SMS Campaign to distribute your survey and you wish to send an email notification to each respondent it can be a little tricky to figure out how. In this tutorial, we'll cover how to make the email addresses associated with your [Email Campaign](#) available in the [Send Email](#) action.

To make the email addresses from your Email Campaign available in the Send Email action, you'll need to set up a [Hidden Value](#) within the survey to store them. Follow these steps to do so.

1. On the first page of the survey, click the **Action** option and select **Hidden Value**.
2. Change the name to "Respondent email address."
3. Click the **Select a Merge Code** link below the **Populate with the following field**.
4. Select **Email** under **Email Invite Fields** in the menu and click **Insert**.
5. Click **Save Action**.



The screenshot shows the 'Edit Action' interface for a 'Hidden Value' action. At the top, there's a dark blue header with 'Edit Action' and tabs for 'Primary Setup' and 'Logic'. A 'Need Help?' link is on the right. Below the header, the 'Name' field contains 'New Hidden Value'. Underneath, the 'Populate with the following:' section has an empty text box and a 'Select a Merge Code' link. The 'Populate with a calculated value:' section has a dropdown menu currently set to '[none]'.

Now this new Hidden Value field "Respondent email address" will be available in the Survey Taker menu of a Send Email action.

The screenshot shows the 'Edit Action' dialog in SurveyGizmo. The 'Primary Setup' tab is active. The 'Name' field is 'Confirmation Email'. The 'Subject' is 'New Response Notification'. The 'From' field is 'noreply' with the email address '@surveygizmo.com (default)'. The 'Reply To' field is 'No Reply <noreply@surveygizmo.com>'. The 'To' field is highlighted with a red circle and contains the merge code `{question('value'), id='31'}`. The 'Add BCC' button is visible. The 'Email Uses' section at the bottom explains that email auto-responders can be used to send thank yous, follow-ups, or survey results.

Export Your Contact Data

Once your responses start rolling in you'll likely want to get a report of your contacts' responses. The easiest way to review this information is to create a [CSV/Excel Export](#) and select the option to Include **Email Invitation & Contact Fields**.

The screenshot shows the 'Create a New CSV / Excel Export' dialog. Under 'Display Options', the checkbox 'Include Email Invitation & Contact Fields' is checked and highlighted with a red arrow. Other options include 'Include URL Variables', 'Include Survey Campaign Data', and 'Include Action Data'. Under 'Custom Tables', the 'Group by Column' radio button is selected. At the bottom, there are buttons for 'Download All Data Now!', 'Cancel', and 'Create Report'.

Reference: Available Contact Fields and Their Merge Codes

Below is a list of each email/sms campaign contact field and its corresponding merge code. These merge codes can be used in your email campaign messages as well as throughout the survey to dynamically populate with the unique value for each contact.

For instance, the merge code `[contact("first name")]` placed in your survey will populate with the

contact's first name.

Throughout the survey builder you will notice an option to **Insert merge code**; use this to reference your contact data in your survey.

Global Contact Fields	Global Contact Field Merge Codes	Custom Contact Fields	Custom Contact Fields Merge Codes
Email	[contact("email")]	Invite Custom Field 1	[invite("custom 1")]
Phone (Mobile)	[contact("mobile phone")]	Invite Custom Field 2	[invite("custom 2")]
First Name	[contact("first name")]	Invite Custom Field 3	[invite("custom 3")]
Last Name	[contact("last name")]	Invite Custom Field 4	[invite("custom 4")]
Address	[contact("street")]	Invite Custom Field 5	[invite("custom 5")]
Ste/Apt	[contact("suite")]	Invite Custom Field6	[invite("custom 6")]
City	[contact("city")]	Invite Custom Field 7	[invite("custom 7")]
State/Region	[contact("region")]	Invite Custom Field 8	[invite("custom 8")]
Country	[contact("country")]	Invite Custom Field 9	[invite("custom 9")]
Postal Code	[contact("postal")]	Invite Custom Field 10	[invite("custom 10")]
Organization Name	[contact("organization")]		
Division	[contact("division")]		
Department	[contact("department")]		
Team	[contact("team")]		
Group	[contact("group")]		
Role	[contact("role")]		
Job Title	[contact("job title")]		
Website	[contact("website")]		
Phone (Home)	[contact("home phone")]		
Phone (Fax)	[contact("fax")]		
Phone (Work)	[contact("work phone")]		
Contact Custom Field	[contact("customfieldname")]		

Need More Fields?

As you can see there are a number of standard contact fields available as well as 10 custom fields. We recommend *against* uploading non-contact data into the contact fields.

For example, say you have a customer ID you wish to upload but each of your custom invite fields are already storing other custom invite data. So, since you are not using the Phone (Fax) field you decide to upload the customer ID into this field. This is a *BAD* idea. First, because this field is a global field so for ALL other surveys where this contact email address has been uploaded this information will display in this field. Second, it can get confusing.

Instead, consider using our [Contact List](#) feature under the Account menu. One of a number of advantages of the Contact List is that you can create as many custom contact fields as you wish.

Creating Merge Codes for Contact List Custom Fields

For custom fields set up within [Contact Lists](#), you can construct merge codes to capture and use this data in your surveys.

The basic structure for custom field [merge code](#) is: **[contact("customfieldname")]** where **"customfieldname"** is replaced with the actual custom field name you created in your contact list. For example, if you have a custom field in your contact list called **"customerid"** then the corresponding merge code would be **[contact("customerid")]**.

Related Articles