

Do you want to personalize your email invitation?
Have a large list of email addresses to send surveys to?
Want higher response rates?

Build a List in the Zarca System



Step One: Build the FILE

Use a Clean Excel file. Place email addresses in the first column. Place other information in respective columns. Column 2 first name, column 3 last name etc. Use only one Excel sheet.

Step Two: Create the List

In the Distribution Manager, select the List Manager button. To get started, Click "New."



Step Three: Programming the List

In Step 2, Attributes refer to the columns in your Excel.

NOTE: The email address column is NOT considered an attribute.

Step Four: Uploading the FILE

In Step 3 – Define Source, select the "Import from file" option. Using "Browse" find your file on your computer and click "Next."

Step Five: Merging Excel with List

In Step 4, if Excel file has column headers, check the box AND you want to avoid duplicate email addresses in your list, click the boxes at the top of the page.

Step Six: Upload the List

Final step: Map your list columns (left side) to your Excel file column headers right side (dropdown).

NOTE: Make sure the dropdown option says "EMAIL ADDRESS" before clicking DONE.

Want to use mail merge?



- Once you build your List, in the Distribution Manager, select Invite via Email.
- Select "Yes" to Use Mail Merge in Email Invite
- Identify the List you wish to use. (Select a few names from the list to test)
- Under "Use Mail Merge", access the dropdown to view the Mail merge fields
- Select the category and view the corresponding place holder
- Copy and paste EXACTLY what is in the placeholder field into the body of your email invitation
- Click NEXT

