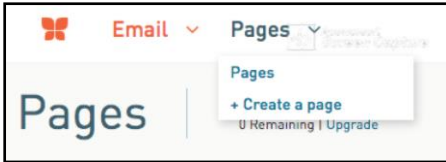
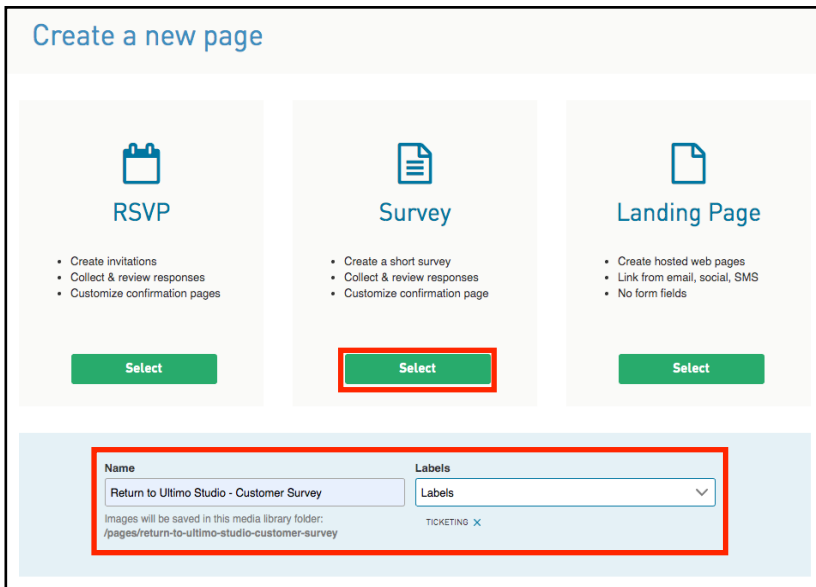


Wordfly Surveys & Tessitura

Sign into Wordfly and click on **Pages** and select **Create a page** from the drop-down menu.



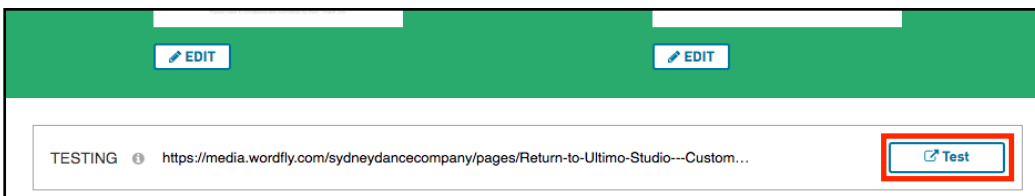
On the **Create a new page** screen, give the survey a **Name** and select the relevant label from the **Labels** drop-down menu.



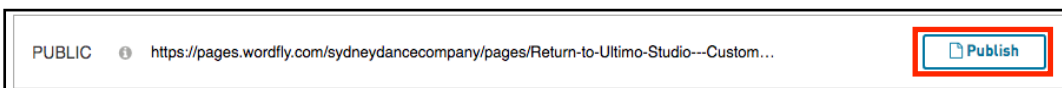
Click on **Select** for Survey.

Create the survey and **Save** it, then **Exit**.
Do the same for the **Confirmation** page.

At any point you can see what it will look like by clicking on the **Test** button to open the survey in a new tab.



Once the survey is at the point where it is ready for use, click on the **Publish** button. This will make it visible in Tessitura.



Click on **Yes** for the confirmation banner that appears along the top of the page.



In Tessitura, you will need to set up some of the **System Tables** or order for the information gathered in the survey to be recorded in the patron's profile.

TR_CUST_ACTIVITY_CATEGORY

This one has already been set up for you - **Wordfly Pages**:

activity	Filter TR_CUST_ACTIVITY_CATEGORY	Id	Description	Auto Close	Inactive	Create Loc	Created By	Create Dt	Last Updated By	Last Update Dt
TR_CUST_ACTIVITY_CATEGORY		23	WordFly Pages	<input type="checkbox"/>	<input type="checkbox"/>	SYDNUSE6	hwilder	20/04/2020 02:46:20 PM	hwilder	20/04/2020 02:46:20 PM
TR_CUST_ACTIVITY_TYPE		22	2020 Subscription Feedback	<input type="checkbox"/>	<input type="checkbox"/>	SYDNUSE6	hwilder	30/09/2019 04:28:35 PM	hwilder	30/09/2019 04:28:35 PM
TR_SPECIAL_ACTIVITY										

TR_CUST_ACTIVITY_TYPE

Description: the name of your survey

Category: Wordfly Pages

Perf Ind: (none) - which becomes an N

Control Group: (Default Control Group)

activity	Filter TR_CUST_ACTIVITY_TYPE	Id	Description	Category	Perf Ind	Control Group	Inactive	Created B
TR_CUST_ACTIVITY_TYPE		72	Return to Studios Survey	WordFly Pages	N	(Default Control Group)	<input type="checkbox"/>	jcalvi
TR_SPECIAL_ACTIVITY		71	Return to Work Staff Survey	WordFly Pages	N	(Default Control Group)	<input type="checkbox"/>	scabi

TR_ORIGIN

Description: Wordfly Survey

Activity Type: the name you created in the last step - in this instance: Return to Studios Survey

origin	Filter TR_ORIGIN	Id	Description	Activity Type	Inactive	Create L
TR_ORIGIN		46	Wordfly Survey	Return to Studios Survey	<input type="checkbox"/>	SYDNUSE
TR_ORIGINAL_SOURCE		45	Wordfly Survey	Return to Work Staff Survey	<input type="checkbox"/>	SYDNUSE

ITR_WF_PAGE_CONTROL_GROUP_MAPPING

Note: This one pulls directly from the Wordfly Survey you have set up.

Page Id: from the drop-down menu select the name of the survey you created.

Control Group: (Default Control Group)

page	Filter ITR_WF_PAGE_CONTROL_GROUP_MA	Id	Page Id	Inactive	Control Group	Created By
ITR_WF_PAGE_CONTROL_GROUP_MA		16	Return to Ultimo Studio -	<input type="checkbox"/>	(Default Control Group)	jcalvi
ITR_WF_PAGE_FIELD_MAPPING		13	Equinox Competition	<input type="checkbox"/>	(Default Control Group)	jcalvi

Note: If the survey contains sensitive information, select **System Admin Only** instead.

ITR_WF_PAGE_FIELD_MAPPING

This sets up the survey questions and answers into a CSI, and in the specific order you want them to be - ie, the same as in the survey itself.

Note: Easiest way to do this is to create the first one and then continue copying the one above, changing only the **Page Field** column to correspond with the survey questions.

Page Field: from the drop-down menu select the first, second question, etc in the survey
Note: take care to make sure they are in the same order as in the survey itself. Best to keep the survey open and cross check as you go.

Update Type: CSI

Update Subtype: Notes - you want the answers to be stored in the CSI Notes field.

Csi Contact: Website

Csi Act Type: the one set up in previous steps - in this instance: Return to Studios Survey

Csi Origin: the one set up in previous steps - in this instance Wordfly Survey [Return to Studios Survey]

Note: all other columns are left untouched as they not required for these surveys at this time.

Id	Page Field	Update Type	Update Subtype
57 29	Return to Ultimo Studio - Customer Survey: 163 1. Which age bracket do you fa	CSI	Notes
58 29	Return to Ultimo Studio - Customer Survey: 164 2. Please select the most accu	CSI	Notes
59 29	Return to Ultimo Studio - Customer Survey: 165 3. How do you normally travel	CSI	Notes
60 29	Return to Ultimo Studio - Customer Survey: 166 4. Under what conditions would	CSI	Notes
61 29	Return to Ultimo Studio - Customer Survey: 167 4a. If other, please specify:	CSI	Notes
62 29	Return to Ultimo Studio - Customer Survey: 168 5. Given your answer to Questi	CSI	Notes
63 29	Return to Ultimo Studio - Customer Survey: 169 6. Would you be looking to att	CSI	Notes
64 29	Return to Ultimo Studio - Customer Survey: 170 7a. Capped classes of reduced	CSI	Notes
65 29	Return to Ultimo Studio - Customer Survey: 171 7b. Fewer classes:	CSI	Notes
66 29	Return to Ultimo Studio - Customer Survey: 172 7c. Hand sanitiser at the door	CSI	Notes
67 29	Return to Ultimo Studio - Customer Survey: 173 7d. Room capacities listed on	CSI	Notes
69 29	Return to Ultimo Studio - Customer Survey: 174 7f. No overlap of classes and	CSI	Notes
68 29	Return to Ultimo Studio - Customer Survey: 175 7e. Limited use of changerooms	CSI	Notes
70 29	Return to Ultimo Studio - Customer Survey: 176 7g. Floor and barre markings t	CSI	Notes
71 29	Return to Ultimo Studio - Customer Survey: 177 7h. Cleaning supplies to perso	CSI	Notes
72 29	Return to Ultimo Studio - Customer Survey: 178 7i. Cashless payments at recep	CSI	Notes
73 29	Return to Ultimo Studio - Customer Survey: 179 7j. Perspex screen at receptio	CSI	Notes
74 29	Return to Ultimo Studio - Customer Survey: 180 7k. Wearing of face masks by t	CSI	Notes
75 29	Return to Ultimo Studio - Customer Survey: 181 7l. Policy on students and sta	CSI	Notes
76 29	Return to Ultimo Studio - Customer Survey: 182 7m. Temperature testing on arr	CSI	Notes
77 29	Return to Ultimo Studio - Customer Survey: 183 7n. Increased cleaning of bath	CSI	Notes
78 29	Return to Ultimo Studio - Customer Survey: 184 8. Are there any barriers for	CSI	Notes
79 29	Return to Ultimo Studio - Customer Survey: 185 9. Would you be interested in	CSI	Notes
80 29	Return to Ultimo Studio - Customer Survey: 186 9a. If other, please specify:	CSI	Notes

Csi Contact	Csi Act Type	Csi Origin
Website	Return to Studios Survey	Wordfly Survey [Return to Studios Survey]
Website	Return to Studios Survey	Wordfly Survey [Return to Studios Survey]

Back in Wordfly, you will need to set up the email campaign that will be going out to the patrons.

Settings

Campaign Type: Standard

Name: Give the campaign a name

Labels: select the relevant ones from the drop-down menu. it can be more than one

I want to do A/B testing on this campaign: Leave off

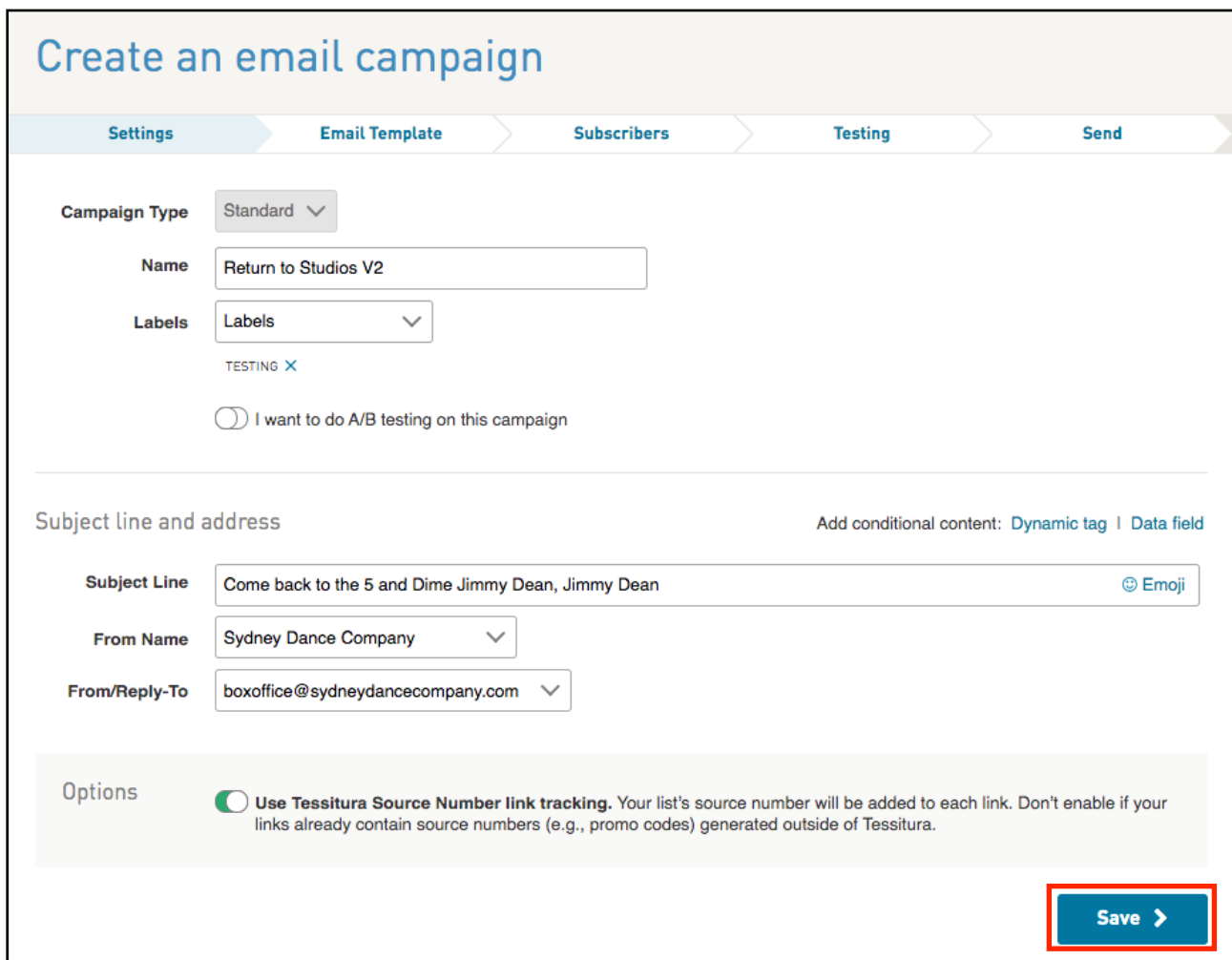
Subject Line: This will be what appears as the subject line in the email the patron receives

From Name: Select the relevant from the drop-down menu

From/Reply-To: Select the relevant from the drop-down menu

Use Tessitura Source Number link tracking: Leave on

Click **Save**



Create an email campaign

Settings | Email Template | Subscribers | Testing | Send

Campaign Type: Standard

Name: Return to Studios V2

Labels: Labels

TESTING X

I want to do A/B testing on this campaign

Subject line and address Add conditional content: [Dynamic tag](#) | [Data field](#)

Subject Line: Come back to the 5 and Dime Jimmy Dean, Jimmy Dean Emoji

From Name: Sydney Dance Company

From/Reply-To: boxoffice@sydneydancecompany.com

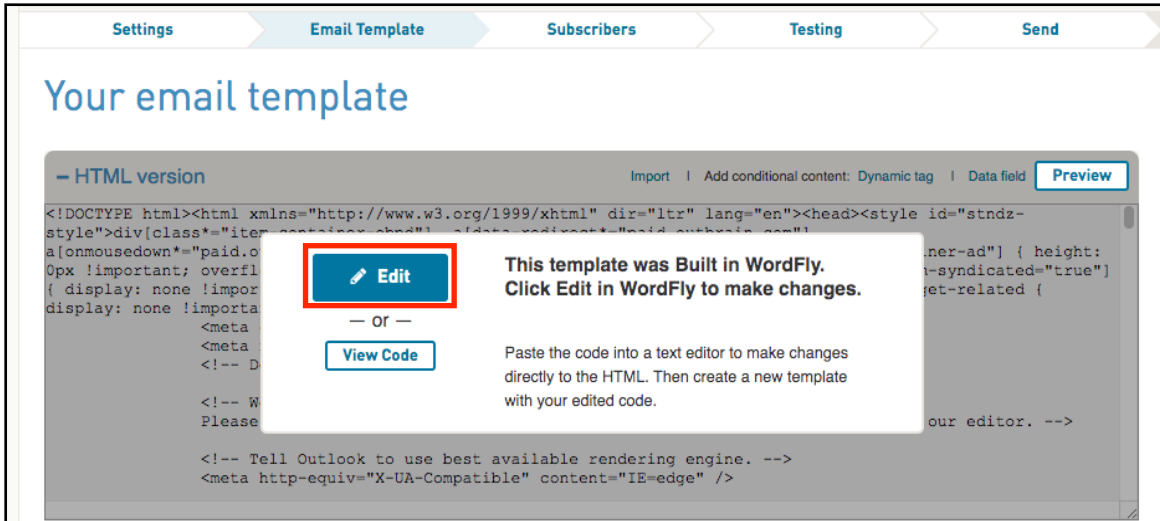
Options

Use Tessitura Source Number link tracking. Your list's source number will be added to each link. Don't enable if your links already contain source numbers (e.g., promo codes) generated outside of Tessitura.

Save

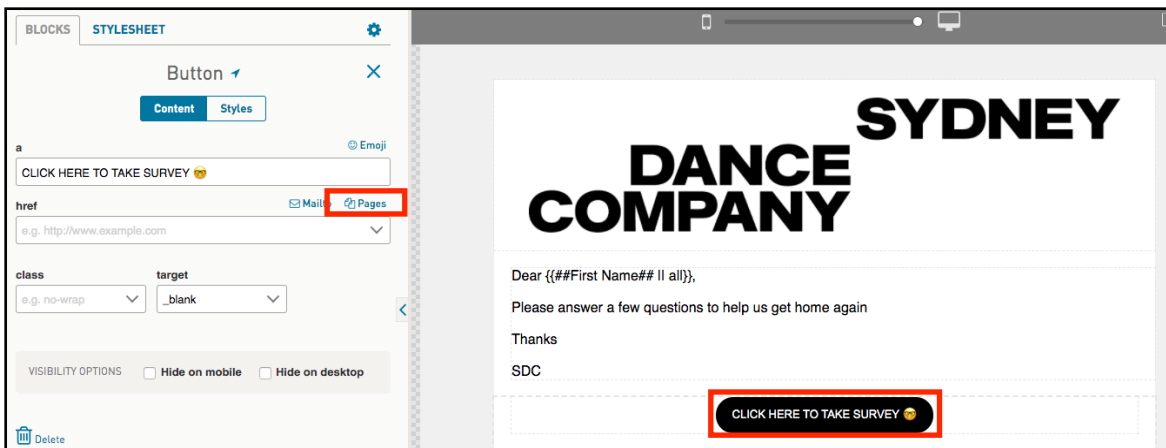
Email Template

Click on the **Edit** button.

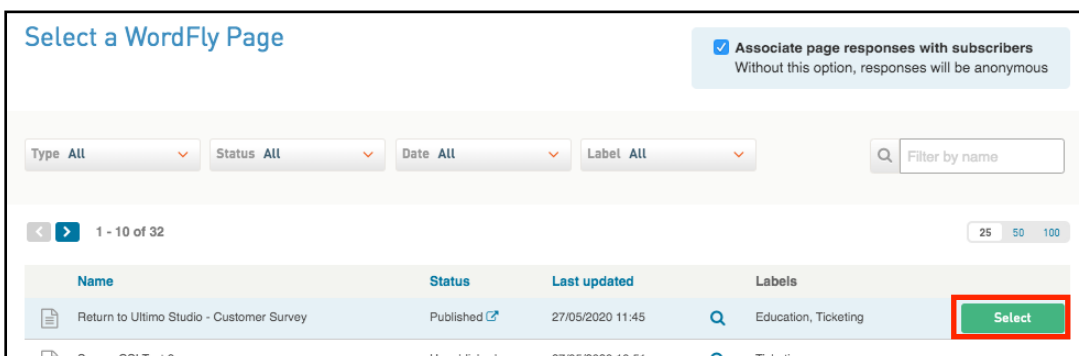


In the new page that opens, create / edit the template to your specifications.

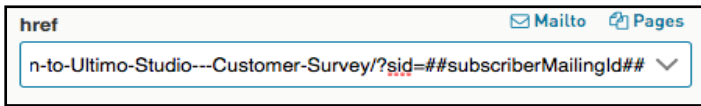
When it is time to configure the button that the patrons will click on to the go survey itself, click on it in the right hand window to open the left hand window, where you will able to configure it.



In this left-hand window, click on the **Pages** link. This will open the **Select a Wordfly Page** window. Find the relevant survey and click on the **Select** button.



Back in the configure window, you will see that **href** field has now been populated with this link, and the end of it has an addition:

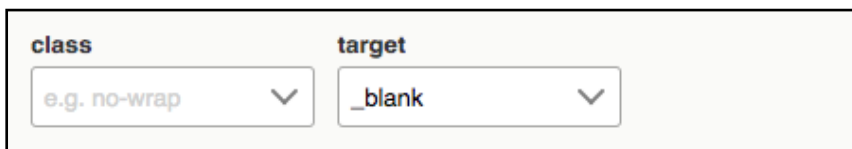


A screenshot of a form field labeled 'href'. To the right of the label are two icons: 'Mailto' and 'Pages'. The text inside the field is 'n-to-Ultimo-Studio---Customer-Survey/?sid=##subscriberMailingId##' followed by a dropdown arrow.

When this email and survey is sent out to a list of patrons already in Tessitura, this new addition - **?sid=##subscriberMailingId##** - will be automatically populated with each of these Tess Ids, and the information gathered will be stored in their individual accounts.

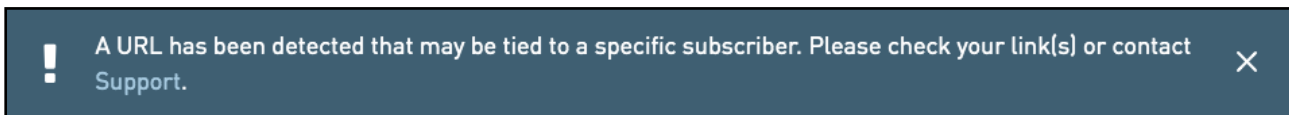
However, in the case of an email and survey being sent to patrons who do not have Tessitura accounts, the information will be stored in a specific profile that has been set up to gather all anonymous responses on the one place - **#230775 - Anonymous Survey**.

At this point it is also worthwhile selecting **_blank** from the **target** drop-down menu. This will mean that when the patron clicks on the button in their email, it will open the survey in a new tab.



A screenshot of two dropdown menus. The first is labeled 'class' and has 'e.g. no-wrap' selected. The second is labeled 'target' and has '_blank' selected.

You may have pop up banner across the top of the page:

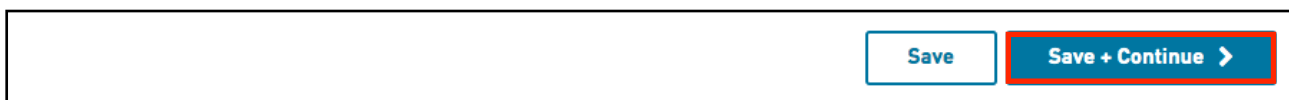


Click on the **x** and then click on **Save**.



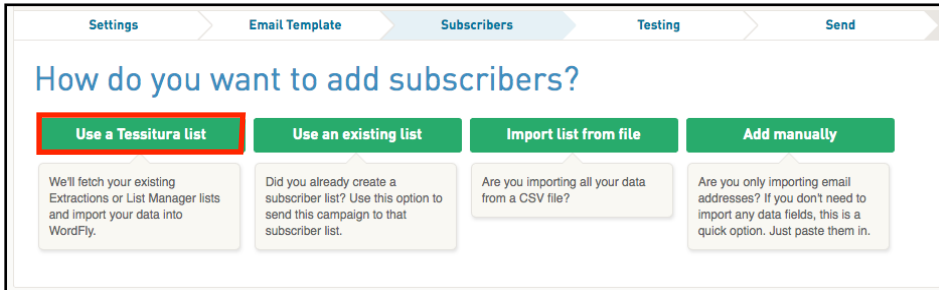
Once saved, click on **Exit** to return to the **Email Template** page.

From here, click on **Save + Continue**.

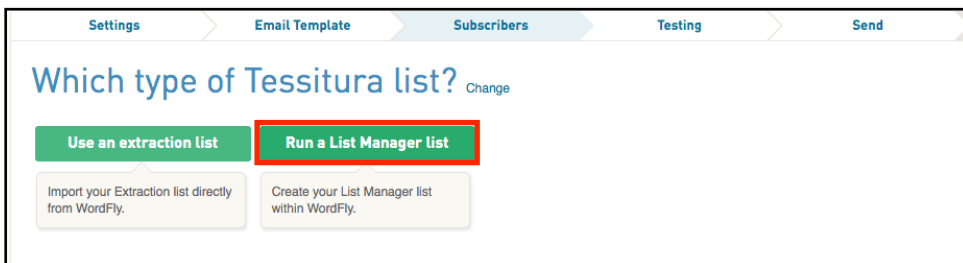


This will bring you to the **Subscribers** tab.

From here you will attach the list of subscribers to the campaign you are creating. Select **Use a Tessitura List**.



Next, select **Run a List Manager list**.



You will now be presented with a long list of every Tessitura list that has been made available to Wordfly.

Hints:

1. Know the number of the Tessitura list before you begin.
2. Click on the **ID** column heading to put them into a more manageable order.
3. Up the amount of entries per page by selecting from the **View per page** drop-down menu.

Select a list

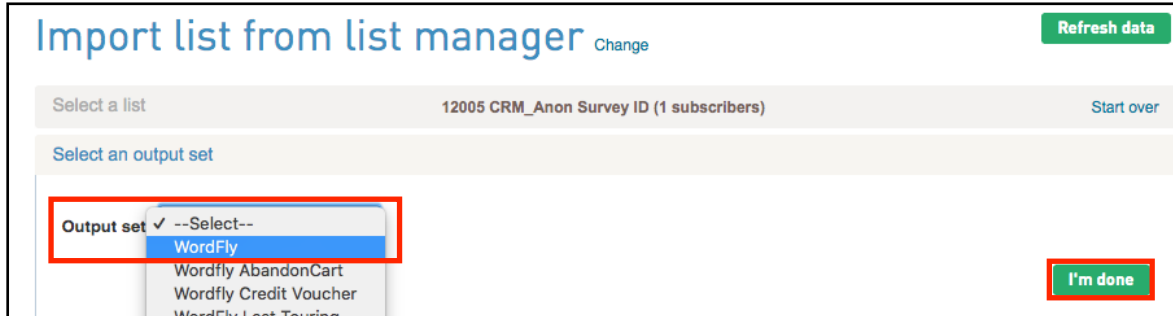
Viewing 1-20 of 1613 [Back](#) [Next](#)

ID ^	Description	Last run	Subscribers
12020	Dev_2020_GT_26MayEDM8.b_MktCom	--	15747
12019	Dev_2020_GT_26MayEDM4.b_MktTix	--	7807
12018	Dev_2020_GT_26MayEDM3.b_Lapsed	--	430
12017	Dev_2020_GT_26MayEDM7_Studio	--	24409
12016	Dev_2020_GT_26MayEDM1_TicketDn	--	307
12014	Dev_2020_Touring EDM2 (lapsed)	--	11
12013	Dev_2020_Touring EDM1 (\$2019)	--	26
12010	Partner Enews June 2020	--	1105
12009	Dev_2020_Touring Postcard EDM	--	40
12007	Dev_2020_SSO/SDC Collab EDM	--	514
12005	CRM_Anon Survey ID	--	1 Select
11963	TKT_SDC all staff survey Oz Co	--	62
11949	Dev_2020_15May EDM2 Syd	--	2795
11944	Dev_2020_15May EDM1 Melb	--	547
11938	Company engagement	--	10
11930	TKT_2020 Season 1 Melb bookers	5/12/2020 11:56:56 AM	241
11928	Partner Enews Mid May 2020	--	1073
11915	MKT_Classes eNews May 2020	5/07/2020 2:36:06 PM	25777
11909	NEW Dev_2020_GivingTues_EDM4	5/05/2020 12:52:52 PM	7896
11905	NEW Dev_2020_GivingTues_EDM8	5/05/2020 11:01:00 AM	20820

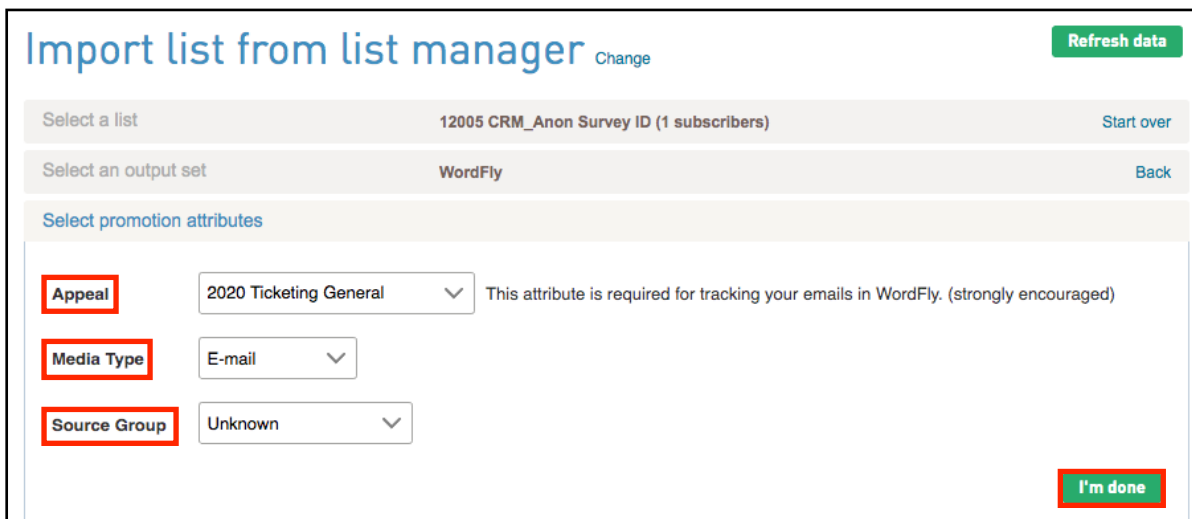
View per page: 20

This next page has three sections.

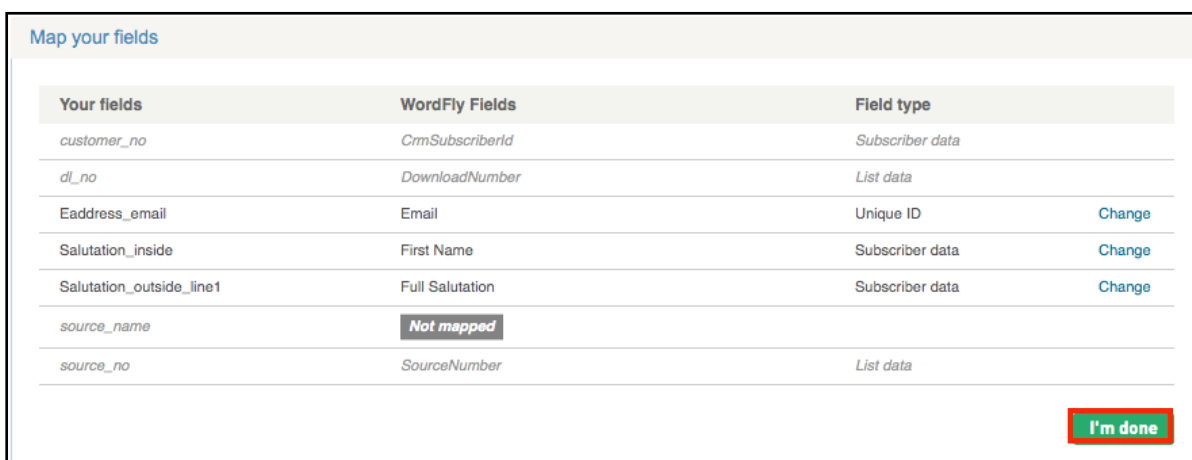
In the **Select an output set** section, select the relevant option from the **Output set** drop-down menu and click **I'm done**.



In the **Select promotion attributes** section, select the relevant options from each of the **Appeal**, **Media Type**, and **Source Group** drop-down menus, and click **I'm done**.



In the **Map your fields** click **I'm done**.



Your fields	WordFly Fields	Field type
customer_no	CrmSubscriberId	Subscriber data
d_l_no	DownloadNumber	List data
Eaddress_email	Email	Unique ID Change
Salutation_inside	First Name	Subscriber data Change
Salutation_outside_line1	Full Salutation	Subscriber data Change
source_name	Not mapped	
source_no	SourceNumber	List data

Note: You can amend any section by clicking the **Back** link at any time before taking the next step.

Once these are done, click on the **Start Importing** button.

Campaign: Return to Studios V2 Updated Today at 3:21 PM ⓘ

Subscriber list: [Return to Studios V2](#) Select a different list

Settings
Email Template
Subscribers
Testing
Send

Import list from list manager Change

Refresh data

Select a list	12005 CRM_Anon Survey ID (1 subscribers)	Start over
Select an output set	WordFly	Back
Select promotion attributes	2020 Ticketing General, E-mail, Unknown	Back
Map your fields	6 fields	Back

Import

Click "Start importing" when you are ready to begin your import.

Start importing >

When the import has finished, click on **Save**.

Campaign: Return to Studios V2 Updated Today at 3:21 PM ⓘ

Subscriber list: [Return to Studios V2](#) Select a different list

Settings
Email Template
Subscribers
Testing
Send

List summary

More list actions ▾

1 subscribers are currently in this list.

0 subscribers were not imported.

0 subscribers opted-out from this list or were manually unsubscribed.

– List history

Date ▾	Type	By	Imported	Not imported
27/05/2020 3:24:11	Imported	John	1	0

[+ Subscribers by top domains](#)

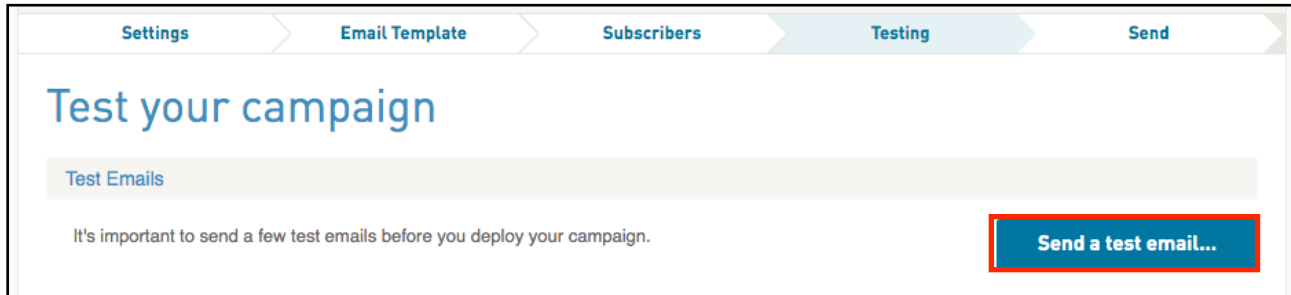
[+ Subscriber import issues](#)

Save >

You will now be in the **Testing** tab.

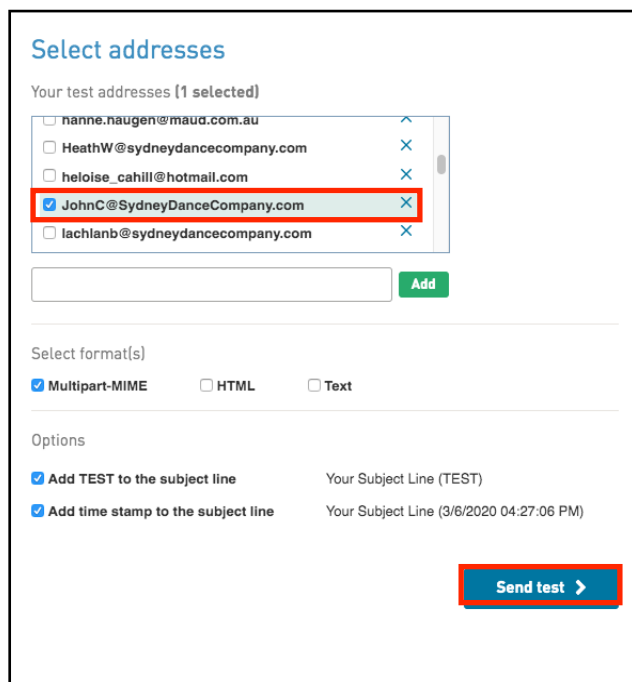
Note: *It is recommended that you test, test, test until you are confident it is correct to send out to patrons.*

Click on the **Send a test email...** button to send a test to yourself.



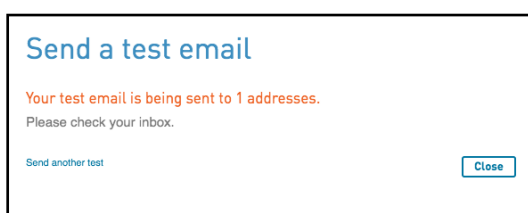
In the **Select Addresses** window, click on all the email addresses you want to send tests to. *It is always good to send to others to test as well, as they may spots things you have missed.*

Once you have selected them all, click on **Send test**.



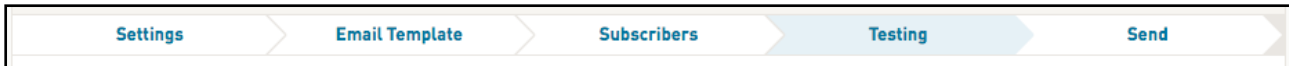
Note: *If your survey is an anonymous one (Patron ID 230775), send this test email to boxoffice@sydneydancecompany.com so that that ID is tokenised in the email itself.*

A confirmation window will appear to let you know it has been sent.



Click **Close**.

At this point if you need to make any changes, click on the relevant tab to go to that section.



Once you are satisfied that all is good to go, click on the **Continue** button.

Settings
Email Template
Subscribers
Testing
Send

Test your campaign

Test Emails

It's important to send a few test emails before you deploy your campaign. Send a test email...

Subscriber Preview

See how your email looks with dynamic data pulled from your list. Subscriber preview

Template Review Summary

We've run a quick review of your email. Click the Full Review button to view the details. Full review

		HTML Version		Text Version	
		Total #	# of issues	Total #	# of issues
Return to Studios (Copy)					
<small>Last Run: 5/27/2020 3:24:40 PM</small>					
✘	Required elements	2	2	2	2
✔	Links	3	--	3	--
✔	Images	3	--	--	--
✔	Dynamic tags	2	--	2	--

Inbox Preview Send a new test

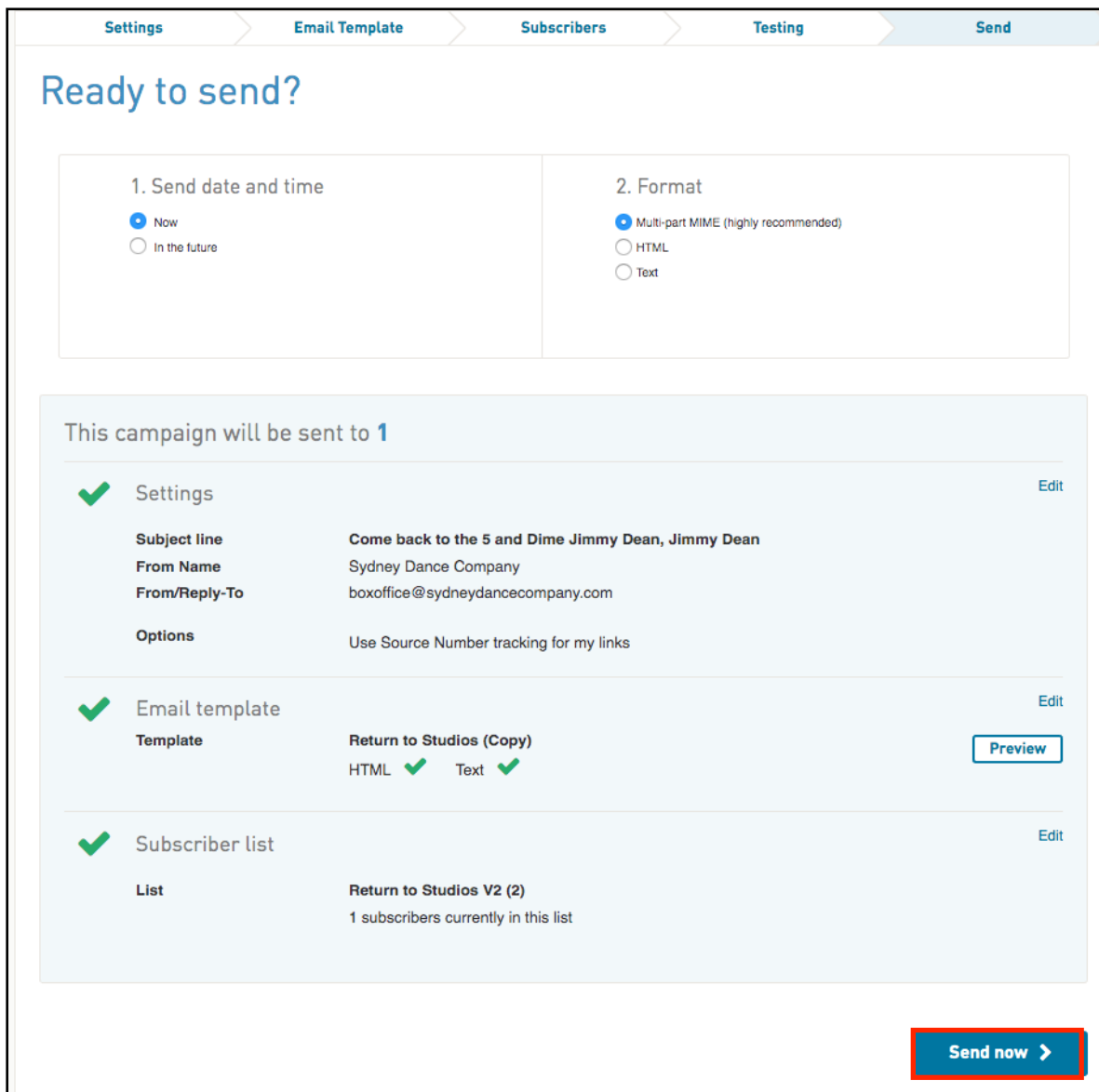
See how your email looks in email clients like Gmail, Outlook, and Yahoo. We can also scan your email for content that might get flagged as spam.

You have **50 Inbox Preview credits** remaining this month.

Continue >

Note: This final step is only if you are sending to a list of patrons who have Tessitura IDs **not** for anonymous surveys. See end note for that those.

On the **Ready to send?** page click **Send now**.



Your email has now been sent to all patrons on your list.

FOR ANONYMOUS SURVEYS

Back on page 9, an email was sent to the boxoffice@sydneydancecompany.com email address as a test. Once that email is received, click on the button link and copy the URL - minus the **&promo=** (and what follows it).

This becomes your link to the survey. This will ensure that the data will be saved in Tessitura against the Anonymous Survey account.

Use that link in the actual email to be sent out to the patrons being marketed to.