



# Launchpad: Getting Started!

May, 2014

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# Welcome!

## Launchpad

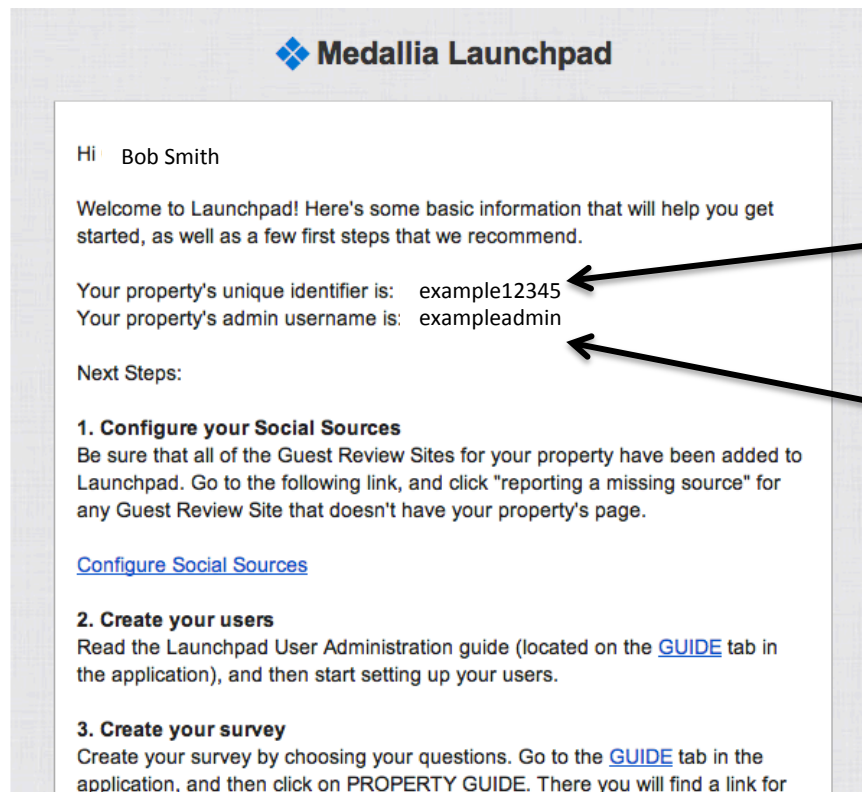
Welcome to the Launchpad family! We are excited to have you and are looking forward to growing your guest experience to new levels.

This guide will provide you with detailed steps to get setup in no time and start fully utilizing our application.

By now, you should have received an email with some starter information. Please have this handy and was walk through the process of setting up your account.

# The Welcome Email

The email you should have received has some key information we are going to need throughout the setup process. Below explains the information you will need to keep handy to get started.



This is the unique identifier for your property in our system. **IMPORTANT:** You will need this to create / update your survey and additional information.

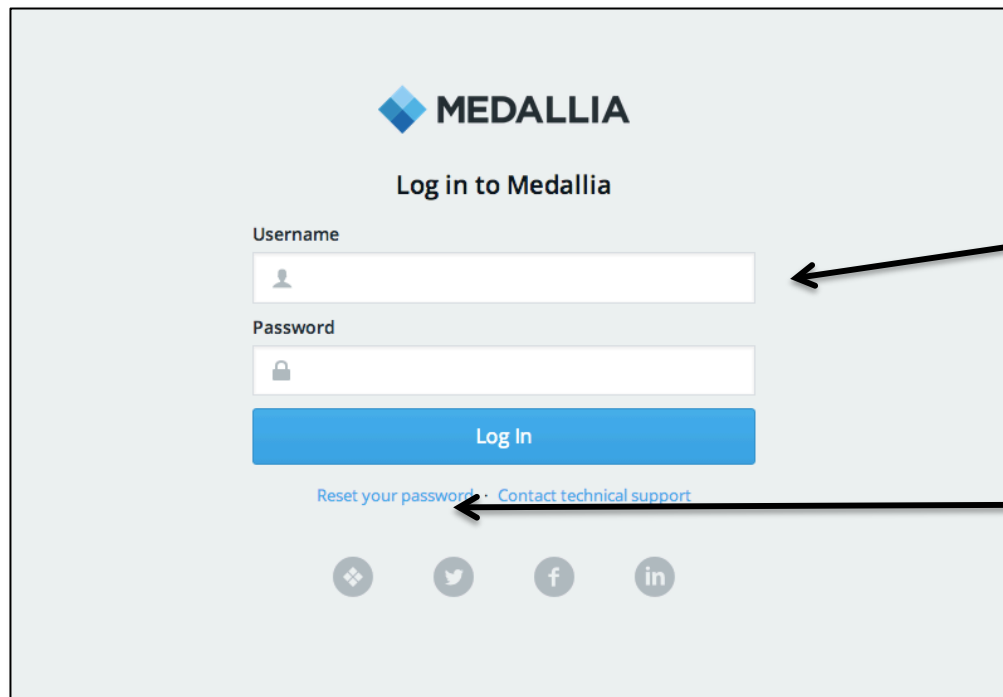
This is the username for the admin for your property. You will need to log in with this admin user to begin to setup your property. **RESET PASSWORD**

# Log into Launchpad

## Login

You can log into the Medallia reporting portal by pasting the following URL in your web browser or clicking Login from your welcome email (Please Bookmark the link):

**<https://login14.medallia.com/hotelexp/>**



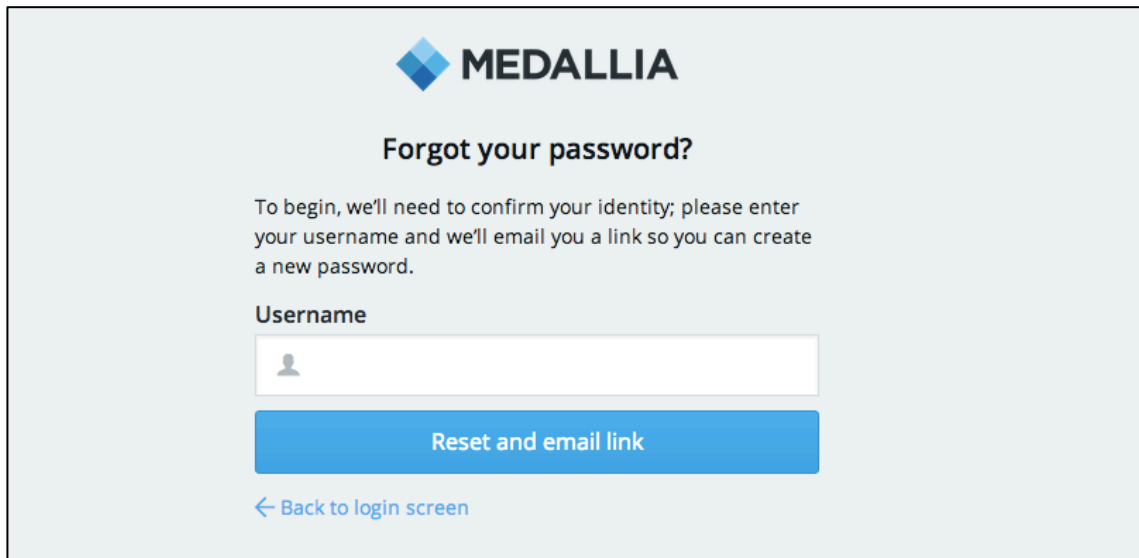
Provide your admin username  
(exampleadmin)

If you do not have your  
password, select to reset your  
password to log in

# Log into Launchpad

## Forgot Password

If you forget this password at any time, you can click on the “Reset your password” link, enter your username, and hit “Reset and email link.” A new temporary password will be emailed to you and you will be able to reset your password.

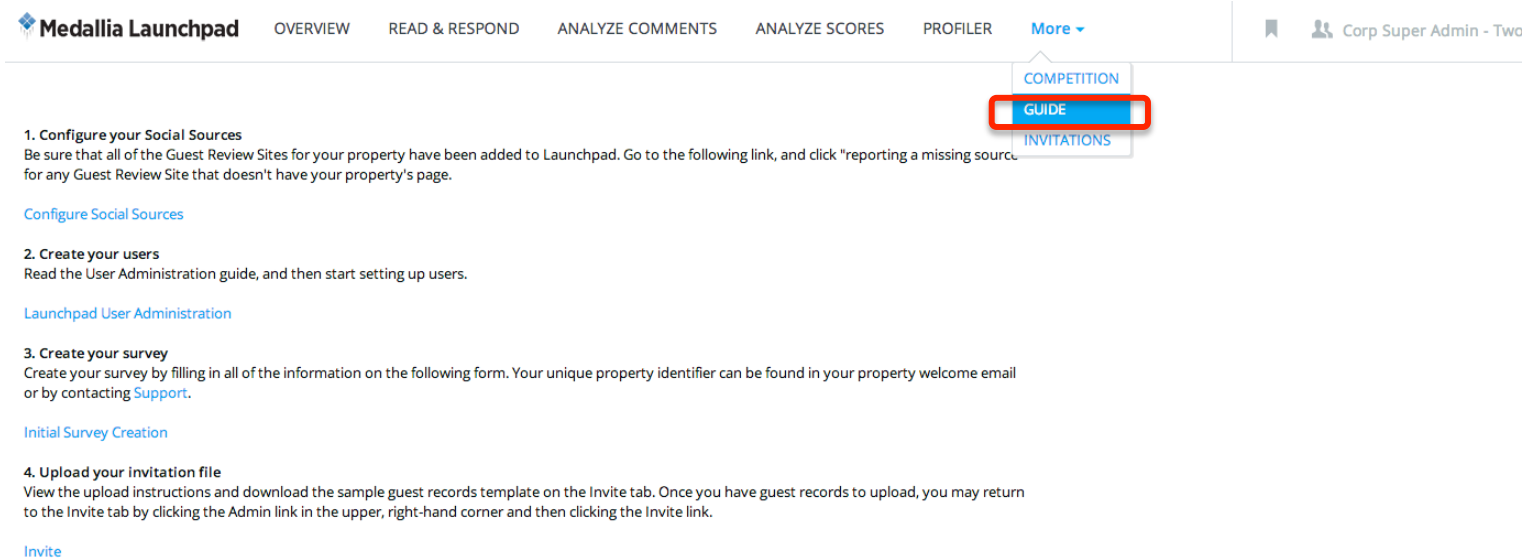


The screenshot shows a web form for password recovery. At the top is the Medallia logo, consisting of a blue diamond icon followed by the word 'MEDALLIA'. Below the logo is the heading 'Forgot your password?'. A paragraph of text reads: 'To begin, we'll need to confirm your identity; please enter your username and we'll email you a link so you can create a new password.' Underneath this is a label 'Username' above a white input field with a grey person icon on the left. Below the input field is a blue button with the text 'Reset and email link'. At the bottom left of the form is a blue link with a left-pointing arrow and the text 'Back to login screen'.

# The Guide

## Quick Summary

A high level summary of each step needed to setup or update your account can always be found in the GUIDE tab in the navigation at any time.



The screenshot shows the Medallia Launchpad interface. The navigation bar includes the Medallia Launchpad logo and several menu items: OVERVIEW, READ & RESPOND, ANALYZE COMMENTS, ANALYZE SCORES, PROFILER, and a 'More' dropdown menu. The 'More' dropdown is open, showing three options: COMPETITION, GUIDE, and INVITATIONS. The 'GUIDE' option is highlighted with a red rectangular box. To the right of the navigation bar, there is a user profile icon and the text 'Corp Super Admin - Two'. Below the navigation bar, the main content area displays a list of four steps for setting up or updating the account, each with a brief description and a link to a detailed guide.

**1. Configure your Social Sources**  
Be sure that all of the Guest Review Sites for your property have been added to Launchpad. Go to the following link, and click "reporting a missing source" for any Guest Review Site that doesn't have your property's page.  
[Configure Social Sources](#)

**2. Create your users**  
Read the User Administration guide, and then start setting up users.  
[Launchpad User Administration](#)

**3. Create your survey**  
Create your survey by filling in all of the information on the following form. Your unique property identifier can be found in your property welcome email or by contacting [Support](#).  
[Initial Survey Creation](#)

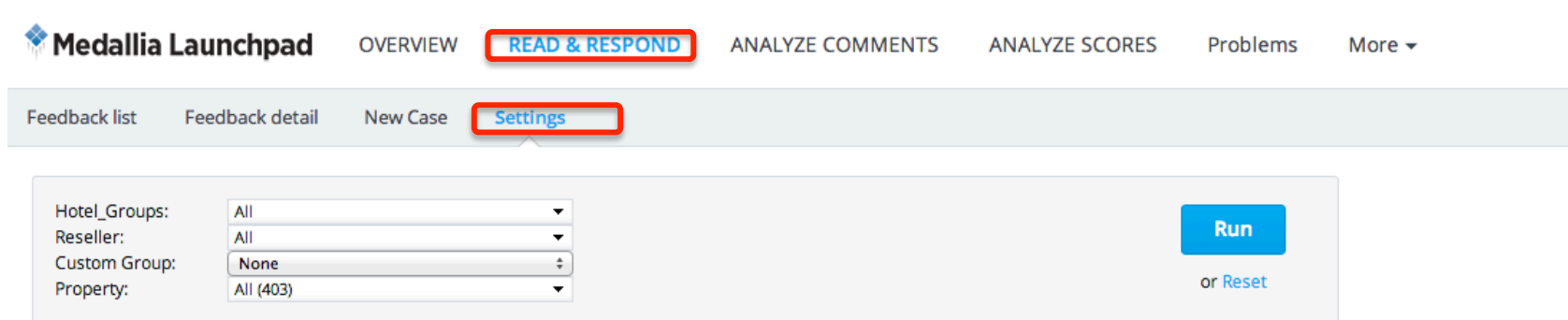
**4. Upload your invitation file**  
View the upload instructions and download the sample guest records template on the Invite tab. Once you have guest records to upload, you may return to the Invite tab by clicking the Admin link in the upper, right-hand corner and then clicking the Invite link.  
[Invite](#)

# Step 1: Social Reviews

## Locate Settings

The first step is to setting which social sites you would like to pull reviews from.

1. Under “READ & RESPOND”, select “Settings.” Here you will see a list of social sites we support.



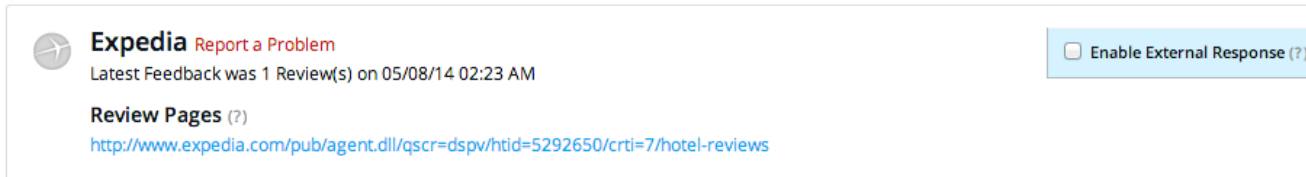
The screenshot shows the Medallia Launchpad interface. At the top, there is a navigation bar with the following items: Medallia Launchpad, OVERVIEW, READ & RESPOND (highlighted with a red box), ANALYZE COMMENTS, ANALYZE SCORES, Problems, and More ▾. Below this is a secondary navigation bar with Feedback list, Feedback detail, New Case, and Settings (highlighted with a red box). The main content area contains a form with four dropdown menus: Hotel\_Groups (All), Reseller (All), Custom Group (None), and Property (All (403)). To the right of these menus is a blue Run button and a link for or Reset.



# Step 1: Social Reviews

## Verify and Update Review Sites

1. If you see a URL already listed for a site, it is because we've tried to pull reviews based on your location. However, please verify the URL is correct. If it is not, select "Report a Problem" to remove it.



Expedia [Report a Problem](#)  
Latest Feedback was 1 Review(s) on 05/08/14 02:23 AM  
[Review Pages \(?\)](#)  
<http://www.expedia.com/pub/agent.dll/qscr=dspv/htid=5292650/crti=7/hotel-reviews>

Enable External Response (?)

← Select this checkbox if you would like to reply to reviews directly through the application

2. If you see a site that does NOT have a URL listed, select to report a missing source and provide the URL of the review page. *(Please note, the URL must be an international site using .com)*

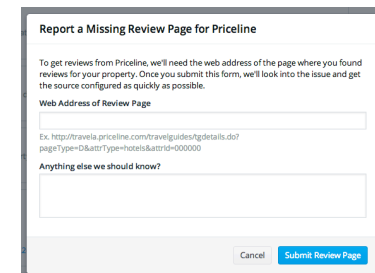


Orbitz  
We haven't found any Orbitz reviews for this property dated after August 1st, 2011. If we're missing anything, let us know by [reporting a missing source](#).

P Priceline  
We haven't found any Priceline reviews for this property dated after August 1st, 2011. If we're missing anything, let us know by [reporting a missing source](#).

Travelocity  
We haven't found any Travelocity reviews for this property dated after August 1st, 2011. If we're missing anything, let us know by [reporting a missing source](#).

Enable External Response (?)



**Report a Missing Review Page for Priceline**

To get reviews from Priceline, we'll need the web address of the page where you found reviews for your property. Once you submit this form, we'll look into the issue and get the source configured as quickly as possible.

Web Address of Review Page

Ex. <http://travela.priceline.com/travelguides/tgdetails.do?pageType=D&attrType=hotels&attrid=000000>

Anything else we should know?

# Step 1: Social Reviews

## Social Networking Sites

Select to add, remove and respond to reviews on Facebook and Twitter at the bottom of the Settings page.

Verify the correct URLs are provided or remove the individual sources from showing up in the application

Provide your credentials to respond to reviews directly from the application

**Social Networking Sites**

**Facebook**  
<http://www.facebook.com/11mirrors>

**Monitor Facebook Feedback**  
You're currently set up to monitor to Facebook feedback within Medallia. If you need to disable or edit monitoring, you can [remove this setup](#)

**Respond to Facebook Feedback**  
Respond to customers on Facebook without leaving Medallia.  
[Authorize Account](#)

**Twitter**  
<http://www.twitter.com/@11mirrors>

**Monitor Twitter Feedback**  
You're currently set up to monitor to Twitter feedback within Medallia. If you need to disable or edit monitoring, you can [remove this setup](#)

**Respond to Twitter Feedback**  
Respond to customers on Twitter without leaving Medallia.  
[Authorize Account](#)

# Step 1: Social Reviews

## View Social Data

Once you have selected your sources, you will be able to see reviews in the “READ & RESPOND” tab. You can also filter to view only social media reviews.

Medallia Launchpad OVERVIEW READ & RESPOND ANALYZE COMMENTS ANALYZE SCORES PROFILER More

Feedback list Feedback detail Settings

### READ & RESPOND

11 Mirrors Design Hotel - YTD Ending 5/8/14  
Feedback Type: Surveys and Reviews · Guest Filter: All Guests

Hotel\_Groups: All Timeperiod: YTD 2014  
Reseller: All Feedback Type: Surveys and Reviews  
Property: 11 Mirrors Design Hotel Guest Filter: All Guests  
Score Filter: Overall Score  
Alert Filter: -- Select --  
Search: [ ]

**Run** or Reset

Expanded View  Show excluded Records 1-25 of 88

Guest Name	Feedback Date	Overall Score	Comments	Alert	Activity
LOBSTER GROUP	5/8/14	10	Again a big THANK YOU to Wladimir Katschko for th...	:)/New	1
Neil	5/8/14	10	POSITIVE: Service was outstanding; best I have had i...	:)/Closed	2
Anonymous	5/8/14	10	POSITIVE: Очень добл NEGATIVE: Нет компе...	:)/Closed	2
Christopher	5/7/14	7.9	No comment	:)/New	1
Franz	5/7/14	9.6	POSITIVE: Sehr freundliches Personal mit sehr gute...	:)/Closed	2
f Francisco Scordio	5/6/14	10	EXELENTE!!!		
f Connoisseur Circle	5/6/14	10	Congrats again 11 Mirrors Design Hotel!	:)/Closed	2
f Francisco Scordio	5/5/14	10	exelen!!!		

Select to view only Social Reviews

Each icon will represent a different social source

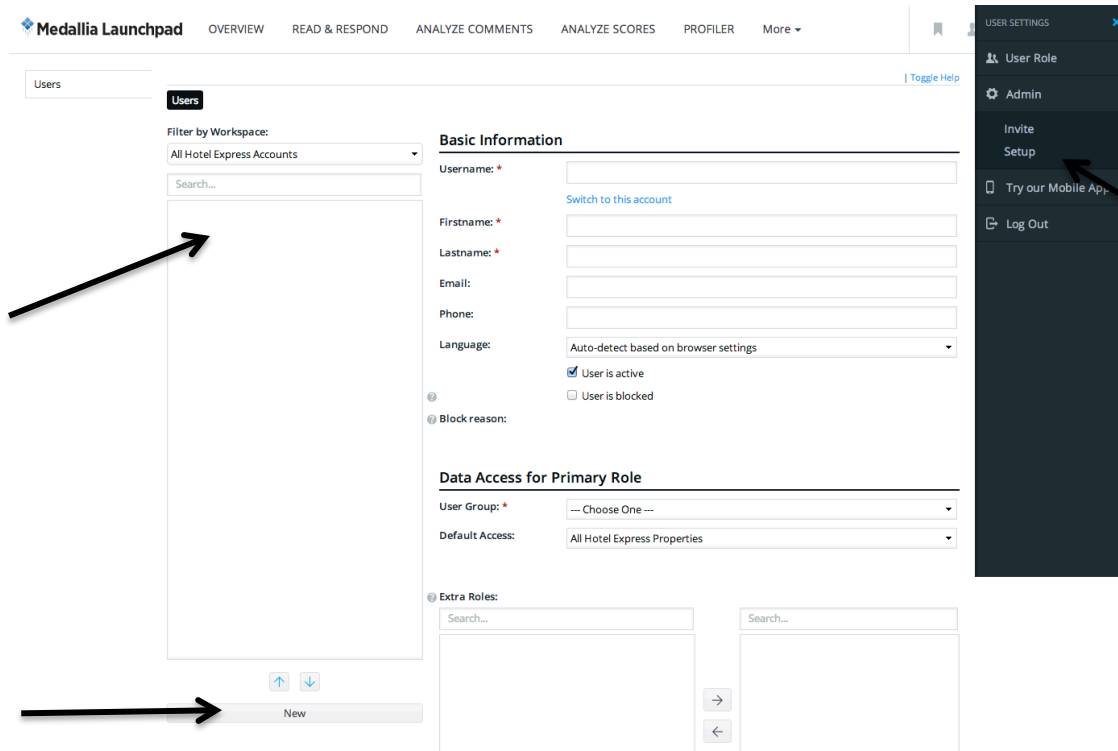
# Step 2: Create Users

## Locate the User Screen

To create or update a user, select the “Setup” link located in the upper right-hand corner. This will take you to the User Setup page. If this is your first time setting up users, then you won’t see any users listed. That’s okay at this point.

Initially, you will not see any users listed, but once you create users, they will be listed on the left-hand side.

Select to create a New user



Select the role name in the top right corner to view this menu. Then select Admin to see the Setup option.

# Step 2: Create Users

## Creating a New User – Basic Information

Clicking the New button will show all of the available new user fields. You will not need to fill in each of these fields, so here we will explain which fields are required.

The screenshot shows the Medallia Launchpad interface. The top navigation bar includes 'OVERVIEW', 'READ & RESPOND', 'ANALYZE COMMENTS', 'ANALYZE SCORES', 'PROFILER', and 'More'. The user is logged in as 'Corp Super Admin - One'. The main content area is titled 'Users' and features a 'Filter by Workspace' dropdown set to 'All Hotel Express Accounts' and a search bar. A modal window titled 'Basic Information' is open, containing the following fields:

- Username:** \* (required) [text input]
- Firstname:** \* (required) [text input]
- Lastname:** \* (required) [text input]
- Email:** [text input]
- Phone:** [text input]
- Language:** [dropdown menu, currently set to 'Auto-detect based on browser settings']
- User is active
- User is blocked
- Block reason:** [text input]

**Username:** Enter the username that you would like to assign to the user. This field cannot be edited after you save.

**Firstname:** Enter the new user's first name.

**Lastname:** Enter the new user's last name.

**Email:** Enter the new user's email address.

*Make sure that the check box next to User is active is checked, and that User is blocked is unchecked.*

# Step 2: Create Users

## Creating a New User – Access Information

Select the Role you would like to give to the user and data access they should have. The role will determine what functionality they will have access to and the data access will limit the response data they can see.

**Data Access for Primary Role**

---

User Group: \*

Default Access:

Extra Roles:

→

←

**For the User Group, you have two options:**

**Corporate:** This is the standard user group for most users. It enables all of the features of the Launchpad application.

**Invitation Uploader:** Choose this if you only want the user to be able to upload records. This user will not be able to see survey responses or scores.

**Default Access:** Select the property that you would like the user to have access for. You may only grant access to properties that you, yourself, have access to.

*Please ignore the two sections that are titled Not Assigned and Assigned Extra Roles. These are not active for Launchpad.*

# Step 2: Create Users

## Creating a New User – Additional Information

**Additional Information**

Email user the password

④ Password last emailed:

④ Password last set:

④ Failed Login count:

④ Last Login:

④ Password not set reason:

④ Last intercept survey:

④ Intercept survey count:

④ Last intercept:

④ Intercept count:

④ Opted-out from Intercept survey:

④ Company Account ID:

④  NoAutomaticUpdate

④  ExcludeFromUserActivity

Keep the Email user the password box checked to send the new user a welcome email once you save the record. You may also email the user the welcome email later if would like.

All of the additional, read-only fields here display various information about the new user account. You may ignore these fields. The last field, Company

Account ID should be left blank, and the NoAutomaticUpdate should be left unchecked.

Click Save at the bottom of the form, and the user account has been created! Once the page refreshes, you will see the user form again.

Note: please leave the Satisfaction field as None.

# Step 2: Edit Users

## Editing an Existing User – Update, Reset Password, Deactivate

The screenshot shows the 'Users' management interface in Medallia Launchpad. The 'Basic Information' section contains the following fields and options:

- Username: 171w1nrdsgzrj0x4
- Email user a new password: (link)
- Firstname: Valentina
- Lastname: Берднских
- Email: valentina.berdinskikh@medallia.com
- Phone: +380442007700
- Language: Auto-detect based on browser settings
- User is active:
- User is blocked:
- Block reason: N/A

The 'Data Access for Primary Role' section shows:

- User Group: Corp Admin (Survey and Social)
- Hotel Express: 17 Mirrors Design Hotel
- Satisfaction: None

The 'Additional Information' section shows:

- Password last emailed: 2013-06-27 13:49:37
- Password last set: N/A
- Failed Login count: 0
- Last Login:
- Password not set reason: A password reset has been requested
- Last Intercept survey:
- Intercept survey count: 0
- Last Intercept:
- Intercept count: 0
- Opted-out from Intercept survey: false
- Company Account ID:

At the bottom of the form are 'Save' and 'Cancel' buttons. On the left side of the interface, there are 'New' and 'Delete' buttons.

You may change the user info for any of the fields that are displayed on the user setup form, except for the username.

If a user forgets their password, you may send them a password reset email again by clicking the Email user a new password link.

If a user leaves your property, you may chose to delete the account (Delete button is under the New button), or simply mark the account inactive by unchecking the User is active checkbox and then saving.



# Step 3: Create Your Survey

Navigate to the following URL to create your survey: <http://survey.medallia.com/?launchpad> (This link can also be found in your welcome email or in the GUIDE tab in the application).\

1. Email: You will need to provide an email address for the main point of contact for the property.
2. Hotel Name: This will be the name of the hotel that will appear on the survey.
3. Unique Identifier: This will be the identifier (example123456) that was provided in your welcome email.

The screenshot displays the Medallia Launchpad interface. On the left, a welcome email is shown with the following content:

**Medallia Launchpad**

Hi Gianluca D'Angeli,

Welcome to Launchpad! Here's some basic information that will help you get started, as well as a few first steps that we recommend.

Your property's unique identifier is: example12345  
Your property's admin username is: exampleadmin

Next Steps:

- 1. Configure your Social Sources**  
Be sure that all of the Guest Review Sites for your property have been added to Launchpad. Go to the following link, and click "reporting a missing source" for any Guest Review Site that doesn't have your property's page.  
[Configure Social Sources](#)
- 2. Create your users**  
Read the Launchpad User Administration guide (located on the [GUIDE](#) tab in the application), and then start setting up your users.
- 3. Create your survey**  
Create your survey by choosing your questions. Go to the [GUIDE](#) tab in the application, and then click on PROPERTY GUIDE. There you will find a link to create your survey.

On the right, the survey creation form is shown with the following content:

Thank you for taking the time to tell us about your experience at Hotel ABC, where you checked out on May 7, 2014.

**Welcome to the Medallia Family!**

To help us code or update your program, please complete this setup form. Should you have any questions, please don't hesitate to contact us at [launchpadsupport@medallia.com](mailto:launchpadsupport@medallia.com).

First, how should we get ahold of you if we have any questions?

Email \*

Now, please enter your hotel name and the unique identifier that was assigned to your property.

Hotel Name \*

Unique Identifier \*

Below the form, there are three Likert scales for rating satisfaction. Each scale has 10 points from 2 to 10. The first scale is labeled "Not at All Satisfied" and "Extremely Satisfied". The second scale is labeled "Extremely Likely". The third scale is labeled "Excellent".

Two black arrows point from the text in the list above to the "example12345" and "exampleadmin" fields in the email, and from the "Hotel Name" and "Unique Identifier" fields in the form to the corresponding text in the list.

# Step 3: Create Your Survey

## Invitation Signature, Alert Email

1. Invitation Name: This will be the name that the email invitations will be signed from
2. Invitation Signature: This will appear after the name in the email signature
3. Alert Email: Email notifications will be generated each time a guest is classified as a detractor, passive or promoter. Multiple email address can be provided.

Please provide signature information used on the invitation & reminder.

**Invite Name**

**Invite Signature**

Send alert notifications to this email recipient. If multiple email addresses, separate each by a comma (e.g., john@example.com).

**Alert Email**

Dear Bob Smith,

We hope you enjoyed your recent stay at **Medallia Test**, where you checked out on May 7, 2014.

We genuinely care about your experience with us, and we'd really appreciate your feedback – **it will only take a few minutes.**

[Start Your Survey](#)

We encourage you to share your experience with travelers. At the end of the survey, you'll be invited to review us on TripAdvisor, the world's largest travel site. Travelers will appreciate your candid comments, and so will we.

Thank you in advance for your time.

Kind Regards,

Bob Smith  
guest Service Team

# Step 3: Create Your Survey

## Select Your Questions

Select the questions you would like to appear in your survey from a standard list. To see how the questions will appear, visit: <http://survey.medallia.com/?library-q>. This will show you the question text, type of question, and which page/order they will be shown on (*the ordering is not editable at this moment*).

Please select questions you'd like to see in your survey program. For how these questions appear in the guest survey, see <http://survey.medallia.com/?library-q>

**Additional Overall Questions**

- Overall experience
- Overall accommodation
- If you were to return to this area for the same purpose, how likely would you be to stay with us again?

**Reservation**

- Overall reservation experience
- Ease of booking

**Hotel Facility**

- Appearance of hotel interior
- Appearance of hotel grounds (exterior)
- Hotel safety & security

# Step 3: Create Your Survey

## Select Your Questions

Select the questions you would like to appear in your survey from a standard list. To see how the questions will appear, visit: <http://survey.medallia.com/?library-q>.

This will show you the question text, type of question, and which page/order they will be shown on (*the ordering is not editable at this moment*).

Thank you for taking the time to tell us about your experience at Zebstotel Hotel, where you checked out on February 5, 2014.

How satisfied were you with the SERVICE overall?

How likely would you be to RECOMMEND THIS HOTEL to a friend or colleague?

Please rate the VALUE you received for the price paid?

On this stay, how satisfied were you with:

Overall arrival experience

Overall guest room

Hotel cleanliness

Working order of hotel amenities

Departure experience

Overall food & beverage

What additional feedback can you share with the hotel manager?

Next

The first page of the library survey (URL above) is standard across all properties and cannot be edited.

Use the form to select the additional questions you would like to appear on the survey on the following pages

Please select questions you'd like to see in your survey program. For how these questions appear in the guest survey, see <http://survey.medallia.com/?library-q>

Additional Overall Questions

- Overall experience
- Overall accommodation
- If you were to return to this area for the same purpose, how likely would you be to stay with us again?

Reservation

- Overall reservation experience
- Ease of booking

Hotel Facility

- Appearance of hotel interior
- Appearance of hotel grounds (exterior)
- Hotel safety & security

# Step 3: Create Your Survey

## Custom Lounges, Bars, Restaurants

If you would like to ask specific questions about your properties' lounge, bar or restaurant, be sure to provide the name as you would like it to appear in the survey.

**Lounge name**

- Overall lounge experience
- Lounge ambiance
- Lounge staff service

**Bar 1 Name**

- Overall bar experience
- Bar ambiance
- Quality of food and beverage
- Service speed and efficiency
- Bar staff service

**Restaurant 1 Name**

- Overall restaurant experience
- Reservation experience
- Restaurant ambiance
- Quality of food and beverage
- Service speed
- Cleanliness of restaurant
- Restaurant staff service

Provide the name of the lounge, bar and restaurant to ensure it is displayed on the survey

**How satisfied were you with Lounge Name?**

	Not at All Satisfied										Extremely Satisfied	N/A	
	0	1	2	3	4	5	6	7	8	9	10		
Overall lounge experience	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lounge ambiance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lounge staff service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**How satisfied were you with Bar 2 Name?**

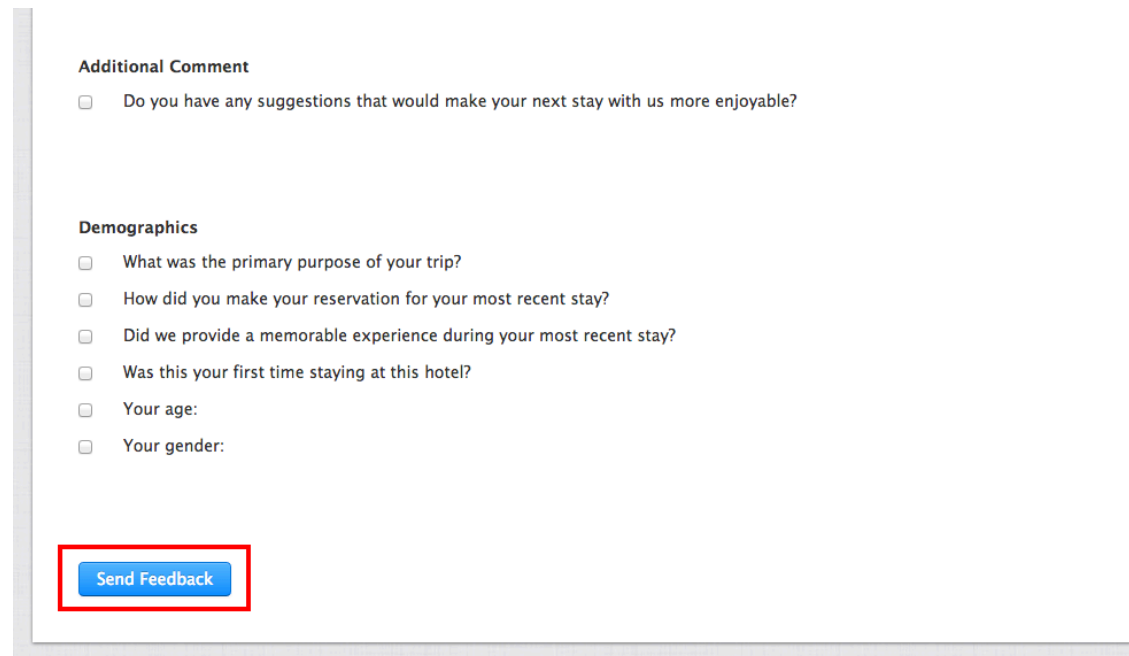
	Not at All Satisfied										Extremely Satisfied	N/A	
	0	1	2	3	4	5	6	7	8	9	10		
Overall bar experience	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bar ambiance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of food and beverage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Service speed and efficiency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

# Step 3: Create Your Survey

## Submit Survey

Once you have selected all the questions, be sure to Save. The best way to test out the survey is to send yourself an invitation (described in the following slides).

If your questions did not populated, be sure you entered in the proper Unique Identifier in the form.



The screenshot shows a survey form with two sections: 'Additional Comment' and 'Demographics'. The 'Additional Comment' section has one question: 'Do you have any suggestions that would make your next stay with us more enjoyable?'. The 'Demographics' section has five questions: 'What was the primary purpose of your trip?', 'How did you make your reservation for your most recent stay?', 'Did we provide a memorable experience during your most recent stay?', 'Was this your first time staying at this hotel?', 'Your age:', and 'Your gender:'. A blue button labeled 'Send Feedback' is located at the bottom left of the form and is highlighted with a red border.

# Step 4: Invite guests

## Send Out Invitations

To send out invitations, navigate to the “Invite” section in the top-right hand corner.

The screenshot displays the Medallia Launchpad interface. At the top, there are navigation tabs: OVERVIEW, READ & RESPOND, ANALYZE COMMENTS, ANALYZE SCORES, PROFILER, and More. Below these are two buttons: 'Upload Records From File' and 'Input Records Manually'. The 'Upload Records From File' button is highlighted with an arrow and the text 'To invite multiple guests at once'. The 'Input Records Manually' button is highlighted with an arrow and the text 'To invite a single guest at a time'. Below the buttons is a file upload section with a 'Choose File' button and the text 'No file chosen'. There are also links for 'Show upload instructions' and 'Manage field mappings'. Below this is an 'Invitation List' table with columns for Email, First name, Last name, Property, and Unit from Setup Form. The table is currently empty, showing the message '— You currently have no invites to send. —' and a 'Send Invites' button. In the top right corner, a 'USER SETTINGS' menu is open, showing options for 'User Role', 'Admin', 'Invite', 'Setup', 'Try our Mobile App', and 'Log Out'. The 'Invite' option is highlighted with a red box and an arrow pointing to it from the text 'Select the role name in the top right corner to view this menu. Then select Admin to see the Invite option.'

To invite multiple guests at once

To invite a single guest at a time

Medallia Launchpad

OVERVIEW READ & RESPOND ANALYZE COMMENTS ANALYZE SCORES PROFILER More

Upload Records From File Input Records Manually

Point us to the file: Choose File No file chosen

Show upload instructions Manage field mappings

Invitation List

Email	First name	Last name	Property	Unit from Setup Form
— You currently have no invites to send. —				

Send Invites

USER SETTINGS

- User Role
- Admin
- Invite
- Setup
- Try our Mobile App
- Log Out

Select the role name in the top right corner to view this menu. Then select Admin to see the Invite option.

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# Step 4: Invite guests

## Upload Invitation File

In order to send out invitations, you will need to upload a file with information about the user's you would like to survey. Select the "Show Upload instructions" link to view a sample file.

The screenshot shows the Medallia Launchpad interface. At the top, there is a navigation bar with the following items: Medallia Launchpad, OVERVIEW, READ & RESPOND, ANALYZE COMMENTS, ANALYZE SCORES, PROFILER, and M. Below the navigation bar, there are two tabs: "Upload Records From File" (selected) and "Input Records Manually". Under the "Upload Records From File" tab, there is a text input field "Point us to the file:" with a "Choose File" button and "No file chosen" text. To the right of this field are two links: "Hide upload instructions" and "Manage field mappings". Below this is the "Upload Instructions" section, which contains a list of five steps. To the right of the instructions is a light blue box titled "Required fields:" containing a list of five items: Checkin Date, Checkout Date, Email, First name, Last name, and Property. Below the instructions and required fields is the "Invitation List" section, which contains a table with five columns: Email, First name, Last name, Property, and Unit from Setup Form. Below the table is the text "— You currently have no invites to send. —" and a "Send Invites" button. Three arrows point from text annotations to specific elements in the interface: one points to the "Manage field mappings" link, one points to the "download the sample template file here" link, and one points to the "Required fields:" list.

Select to view detailed instructions

Download a sample file to see what fields the system will accept

These are the fields that are required for every guest. If they are not present, the system will reject the record and will not send out an invite to that guest.

**Upload Instructions**

1. Generate and store the data file on your local drive or disk
2. Use the Browse button to locate and select your file
3. Medallia accepts the following file formats: Excel (.xls) or comma separated text (CSV)
4. For an example, [download the sample template file here.](#)
5. If our upload system cannot identify your fields or column headings, we will prompt you to map your file's columns to our required fields

**Required fields:**

- Checkin Date
- Checkout Date
- Email
- First name
- Last name
- Property

**Invitation List**

Email	First name	Last name	Property	Unit from Setup Form
— You currently have no invites to send. —				

Send Invites



# Step 4: Invite guests

## Inviting Multiple guests: Creating the Invitation File

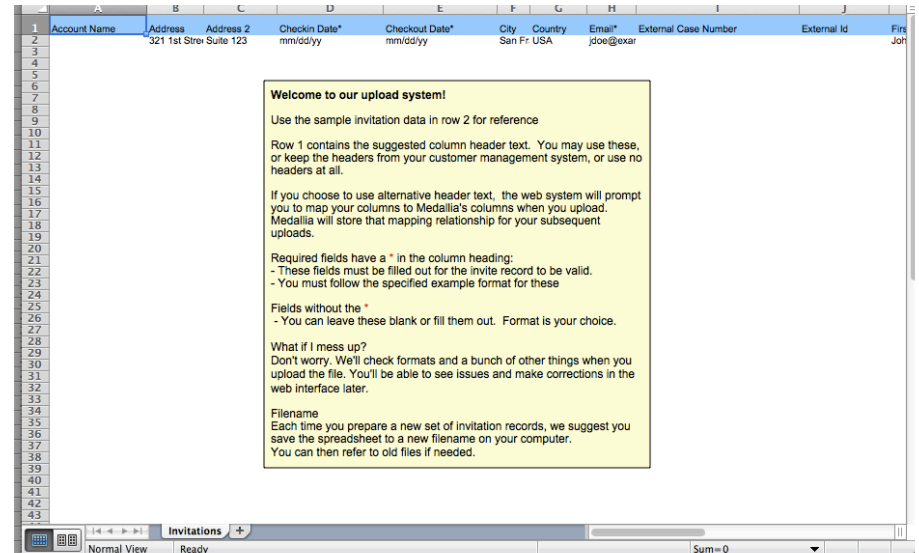
The invitation file can be in either Excel (xls) or comma separated text (CSV). The system can accept the following fields.

### Required:

1. Checkin Date – guest’s date of checkin (*mm/dd/yy*)
2. Checkout Date – guest’s date of checkout (*mm/dd/yy*)
3. Email – guest’s email address survey will be sent to
4. First Name – guest’s first name
5. Last Name – guest’s last name
6. Property – UNIQUE IDENTIFIER from the welcome email

### Optional:

1. Account Name – Name of your hotel
2. Address – guest’s address line 1
3. Address 2 – guest’s address line 2
4. City – guest’s city
5. State/Province – guest’s state
6. Zip/Postal Code – guest’s zip or postal code
7. Country – guest’s country
8. External ID – Can be used if a file is exported from a property management system
9. Phone – guest’s phone number
10. Reservation ID – guest’s reservation / confirmation number
11. Room Number – Room that guest stayed in
12. Unit from Setup Form – UNIQUE IDENTIFIER provided in the welcome email



# Step 4: Invite guests

## Inviting Multiple guests: Creating the Invitation File

The first row of the file normally contains the field / column headers. You may use what is provided in the example file or you may use your own headers. If you use alternative headers, the system will ask you to MAP your header to the correct field. You will only have to do this once.

Medallia Launchpad OVERVIEW READ & RESPOND ANALYZE COMMENTS ANALYZE SCORES PROFILER Mor

Upload Records From File Input Records Manually

Please customize your data relationships

Column / Field	Your Heading	Sample #1	Sample #2	Sample #3	Desired Relationship to Medallia	Status
1.	Property	TIBOPRS	TIBOPRS	TIBOPRS	Property	
2.	Address1	6 Blaize Ct			Address	
3.	Checkin Date	2014-05-06	2014-05-05	2014-05-06	Checkin Date	
4.	Checkout Date	2014-05-06	2014-05-06	2014-05-06	Checkout Date	
5.	City	Newtown		Brooklyn	City	
6.	Country	US	US	US	Country	
7.	Email	cynthia.marino@merck.com			Email	
8.	First Name	Father	William	Miriam	First name	
9.	Last Name	Benabou	Taranto	Glanzer	Last name	
10.	Phone #	732-713-2062		718-483-4868	Phone	
11.	Room #	9387	1105	4406	--- Choose One ---	Please select relationship
12.	State		PA	NY	--- Choose One ---	Please select relationship
13.	Zip Code	18940		11211	--- Choose One ---	Please select relationship

Name this filetype: Custom Format #2

Cancel Next >

Invitation List

Email	First name	Last name	Property	Unit from Setup Form
— You currently have no invites to send. —				

Send Invites

The system will try to guess what field each heading is meant to represent. If it is not correct, you can select a new field from the dropdown

If the system does not know what field to map the heading to, an error message will show asking you to select a field.

NOTE: A field can only be mapped to a SINGLE heading.

Be sure to name and save your mapping so that the system will remember this for future file uploads. Then click NEXT.

# Step 4: Invite guests

## Inviting Multiple guests: Processing the Invitation File

Once you select the mapping, the system will display the list of records in the file and will show any errors with each of the records.

Upload Records From File | Input Records Manually

Point us to the file:  No file chosen

[Show upload instructions](#)  
[Manage field mappings](#)

Note: 39 records have errors and will not be sent until corrected.

Invitation List

Email	First name	Last name	Property	Unit from Setup Form	Delete all
▲	Father	Benabou	TIBOPRS		Edit   Delete
▲	Miriam	Glanzer	TIBOPRS		Edit   Delete
▲	Peggie & Robert	Strehle	TIBOPRS		Edit   Delete
▲	rdsevers@yahoo.com	Patricia	TIBOPRS		Edit   Delete
▲	Renee	Severs	TIBOPRS		Edit   Delete
▲	binjank@gmail.com	Bini	Janklowicz	TIBOPRS	Edit   Delete
▲	binjank@gmail.com	Bini	Janklowicz	TIBOPRS	Edit   Delete
▲	binjank@gmail.com	Bini	Janklowicz	TIBOPRS	Edit   Delete
▲	cynthia.marin@merck.com	William	Taranto	TIBOPRS	Edit   Delete
▲	babbsnstur@optonline.net	Barbara	Rosenberg	TIBOPRS	Edit   Delete
▲	dave.jarzinski@thermofisher.com	Dave	Jarzinski	TIBOPRS	Edit   Delete
▲	miriamporges@gmail.com	Betty	Mayer	TIBOPRS	Edit   Delete
▲	miriamporges@gmail.com	Haidy	Klein	TIBOPRS	Edit   Delete
▲	miriamporges@gmail.com	Miriam	Porges	TIBOPRS	Edit   Delete
▲	a@a.com	Sara	Weinberger	TIBOPRS	Edit   Delete
▲	a@a.com	Miriam	Rubin	TIBOPRS	Edit   Delete
▲	steve.corron@hamiltoncompany.com	Steve	Corron	TIBOPRS	Edit   Delete
▲	ravesharma@deloitte.com	Raveen	Sharma	TIBOPRS	Edit   Delete
▲	ravesharma@deloitte.com	Raveen	Sharma	TIBOPRS	Edit   Delete
▲	ravesharma@deloitte.com	Raveen	Sharma	TIBOPRS	Edit   Delete
▲	binjank@gmail.com	Bini	Janklowicz	TIBOPRS	Edit   Delete
▲	adam.ligeralde@ge.com	Adam	Ligeralde	TIBOPRS	Edit   Delete
▲	larsorb@biotek.com	Brad	Larson	TIBOPRS	Edit   Delete
▲	Ed	Walsh	TIBOPRS		Edit   Delete
▲	Amberlynn	Hunsinger	TIBOPRS		Edit   Delete
▲	Mindy	Einhorn	TIBOPRS		Edit   Delete
▲	amohan@chemgenes.com	Anuj	Mohan	TIBOPRS	Edit   Delete
▲	Carlos	Baez	TIBOPRS		Edit   Delete
▲	joan.sibley@ge.com	Joan	Sibley	TIBOPRS	Edit   Delete
▲	a@a.com	Rachel	Rubin	TIBOPRS	Edit   Delete
▲	nhfreund@gmail.com	Harold	Freund	TIBOPRS	Edit   Delete
▲	julesoknight@yahoo.com	Jules	Knight	TIBOPRS	Edit   Delete
▲	sol11211@gmail.com	Solomon	Herskowitz	TIBOPRS	Edit   Delete
▲		Gervasin/arglin	Wedding Block	TIBOPRS	Edit   Delete
▲		Nj Assn Pupil Svcs	TIBOPRS		Edit   Delete
▲		Strehle/Spencer	Wedding Block	TIBOPRS	Edit   Delete
▲		Noel	Surprise Party	TIBOPRS	Edit   Delete
▲		Ly	TIBOPRS		Edit   Delete
▲		Smith Sanita	TIBOPRS		Edit   Delete
▲		Matza Fun	TIBOPRS		Edit   Delete

Note: 39 records have errors and will not be sent until corrected.

To edit the mapping (custom formats)

The system will display an error message if any of the records failed to generate an invitation.

Edit or delete each record

## SUCCESSFUL UPLOAD

Upload Records From File | Input Records Manually

Point us to the file:  No file chosen

[Show upload instructions](#)  
[Manage field mappings](#)

HotelexpInvitations (8).xls was imported

Invitation List

Email	First name	Last name	Property	Unit from Setup Form	Delete all
priya@medallia.com	John	Doe	medalliatest	Medallia Blanktemplate	Edit   Delete

Once all the records are valid, the Sent Invites button will be enabled and will allow you to send out the invitations.

# Step 4: Invite guests

## Inviting Multiple guests: Why do I have so many errors?

Here are a few possible reasons why you may have an error.

- 1. Missing Required Fields:** Make sure Email, Checkin, Checkout, First Name, Last Name and Property are all populated
- 2. Incorrect Property Identifier:** Make sure the Property column has the UNIQUE IDENTIFIER provided in your welcome email
- 3. Incorrect Formats:** Be sure that the checkin/checkout dates are in mm/dd/yy format, Country should reference the country code (ex: US) and the email should be in the format [xx@xx.xx](#)
- 4. Duplicates:** Be sure that there are no duplicate email addresses amongst records
- 5. File:** Be sure the file is not encrypted or has any special formatting. It should either be in .xls (Excel format 94-2004) or .csv

# Step 4: Invite guests

## Inviting Single guest

You can also invite a single guest one at a time by filling out the form and selecting “Add Invite to List” each time. Once the list has been created, select “Send Invite.”

Provide the information for each guest. Note the required fields must be provided in order to add the invite to the list

Select this tab

Account Name

Address

Address 2

Checkin Date \*

5/8/2014

Checkout Date \*

5/8/2014

City

Country

USA

Email \*

External Case Number

External Id

First name \*

Last name \*

Phone

Property \*

--- Choose One ---

Reservation ID

Room Number

State/Province

Unit from Setup Form

--- Choose One ---

Zip/Postal code

Add invite to list

Invitation List

Email	First name	Last name	Property	Unit from Setup Form
— You currently have no invites to send. —				

Send Invites

Select to send invites once the list is done

# Congratulations!

You have just launched your survey!

Congratulations on completing the setup process and sending out your first set of invites. Once guests start completing their surveys, you will be able to see their responses real-time in the application.

To view additional learning material on the reporting application and resources, visit the **GUIDE** tab in the application.

# Can I update my settings after setup?

Yes!

We encourage our guests to evolve their guest experience program and update their surveys on an ongoing basis based on their business objectives.

To update your survey, visit the following link:

<http://survey.medallia.com/?launchpad&section=questions>

**\*IMPORTANT: When you update your survey, you will have to RESELECT all the survey questions you would like. If you only select the new questions you want, all of the previous questions will be removed.**

To update your invitation signature, visit the following link:

<http://survey.medallia.com/?launchpad&section=invitations>

To update who receives alert emails, visit the following link:

<http://survey.medallia.com/?launchpad&section=questions>

# Questions?

If you are experiencing an issues or have any questions, please contact us at:

[launchpadsupport@medallia.com](mailto:launchpadsupport@medallia.com)