

Converting Triggers to Actions

Help Document from the Odum Institute

December 2020

Triggers Are Being Deprecated and Are No Longer Supported

In the near future, Qualtrics plans to remove the Trigger tools. For details, see the [Qualtrics Community Post on this topic](#). The Odum Institute is already aware of situations where existing triggers are suddenly failing without explanation and Qualtrics Support declines to troubleshoot the problem because they view triggers as a functionality no longer supported. Qualtrics is not providing any clear information on when or if existing triggers will be deactivated; cautious users may wish to convert Triggers on active projects to Actions now to avoid potential problems.

This document describes how to use the Actions tab to perform the same functions as triggers. Section A describes how to set up an action that “fires” immediately after a respondent completes the survey and should be used for converting all types of triggers. The following sections describe the subsequent steps for email triggers and contact list triggers.

All Actions should be tested after they are set up!

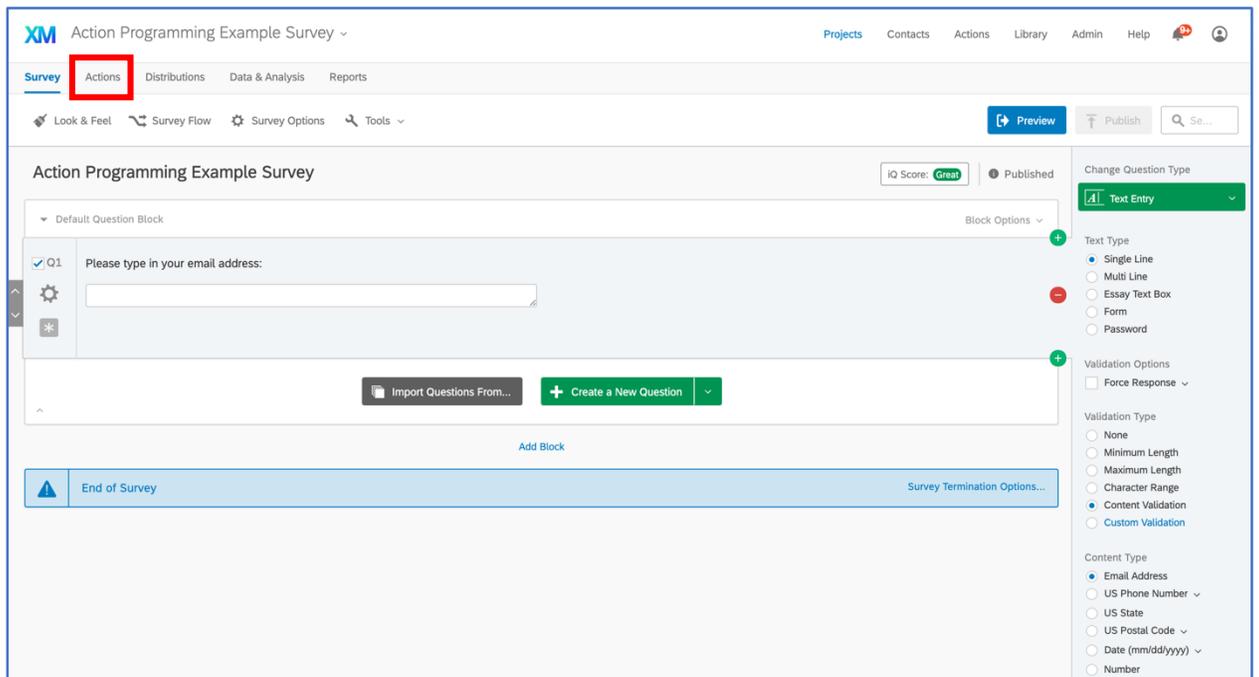
Contents

A. Create an Action to Occur When a Respondent Completes the Survey (All trigger types)	2
B. Action to Send an Email (Formerly Email Trigger)	5
C. Action to Add Survey Respondent to a Contact List (Formerly Contact List Trigger).....	7

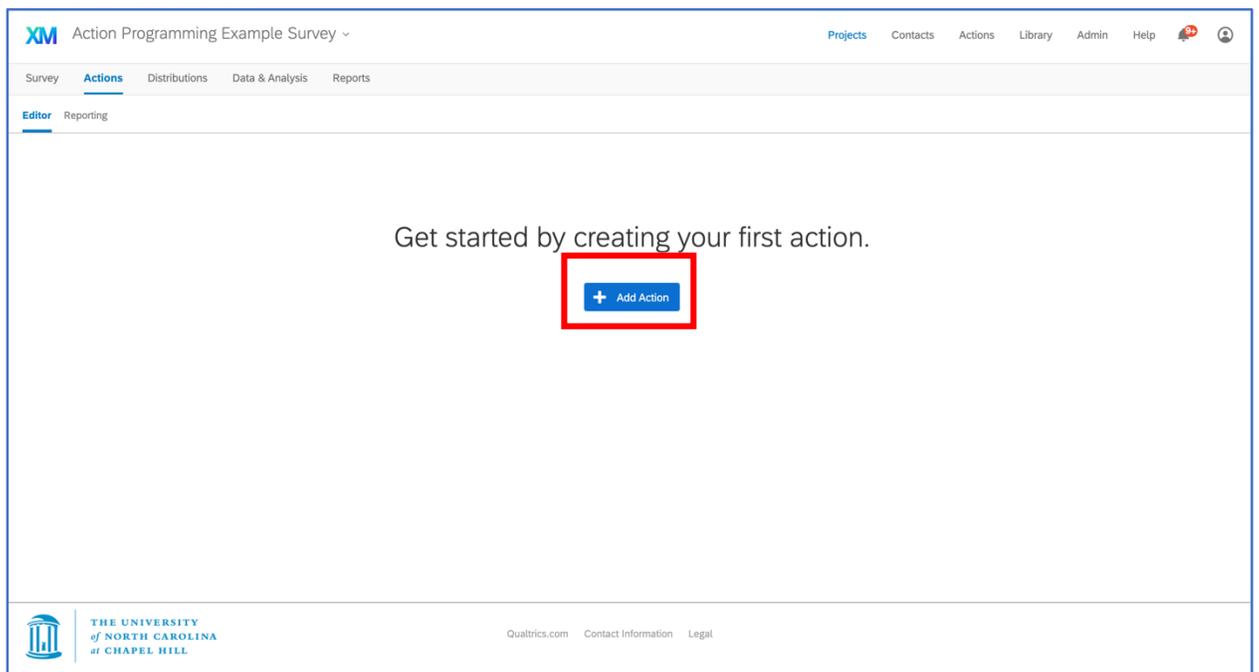
A. Create an Action to Occur When a Respondent Completes the Survey (All trigger types)

All trigger actions begin with the steps in this section.

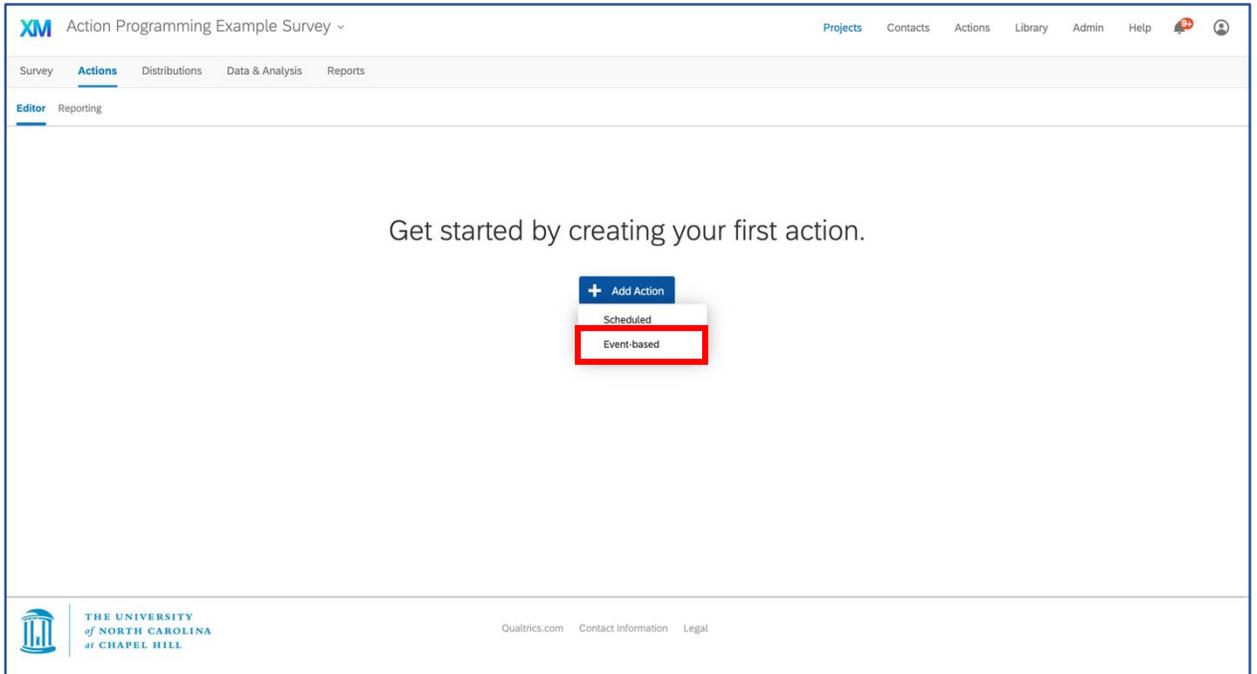
A1. Click “Actions” on the survey editor page.



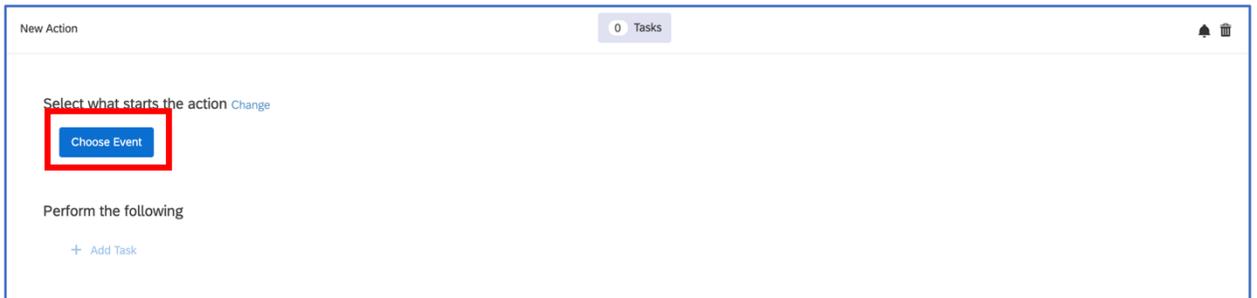
A2. Click “Add Action”



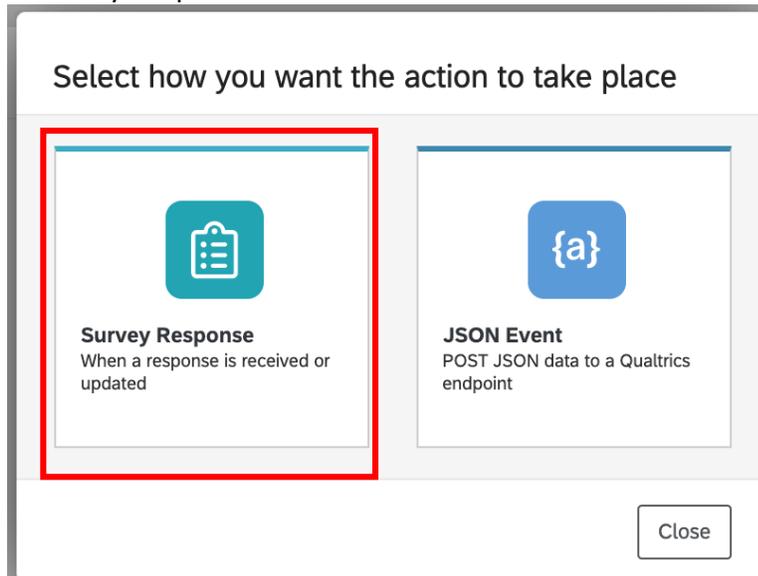
A3. Select “Event Based”



A4. Click “Choose Event”



A5. Select “Survey Response”



A6. Select “Response Created” and “Finish”

The screenshot shows a configuration interface with the title "What do you want to look for?". Below the title, there are two checkboxes: "Response created" (checked) and "Response updated" (unchecked). At the bottom, there are three buttons: "Back" (with a left arrow), "Cancel", and "Finish".

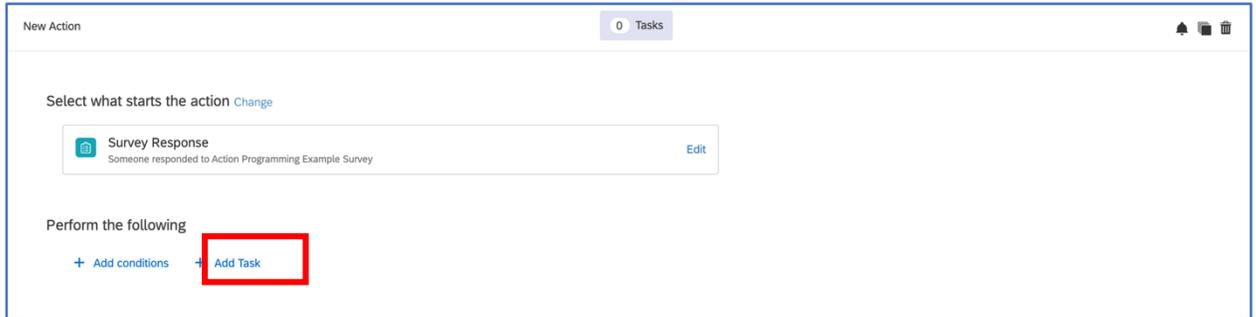
A7. If the trigger/action is to occur every time any respondent completes the survey, proceed now to Section B, C, or D.

If the action is only to occur under certain conditions (for example, only if respondent answers “yes” to a particular question or indicates that their contact information has changed), click “+ Add condition” and follow the prompts (steps not shown here.) Then proceed to Section B, C, or D.

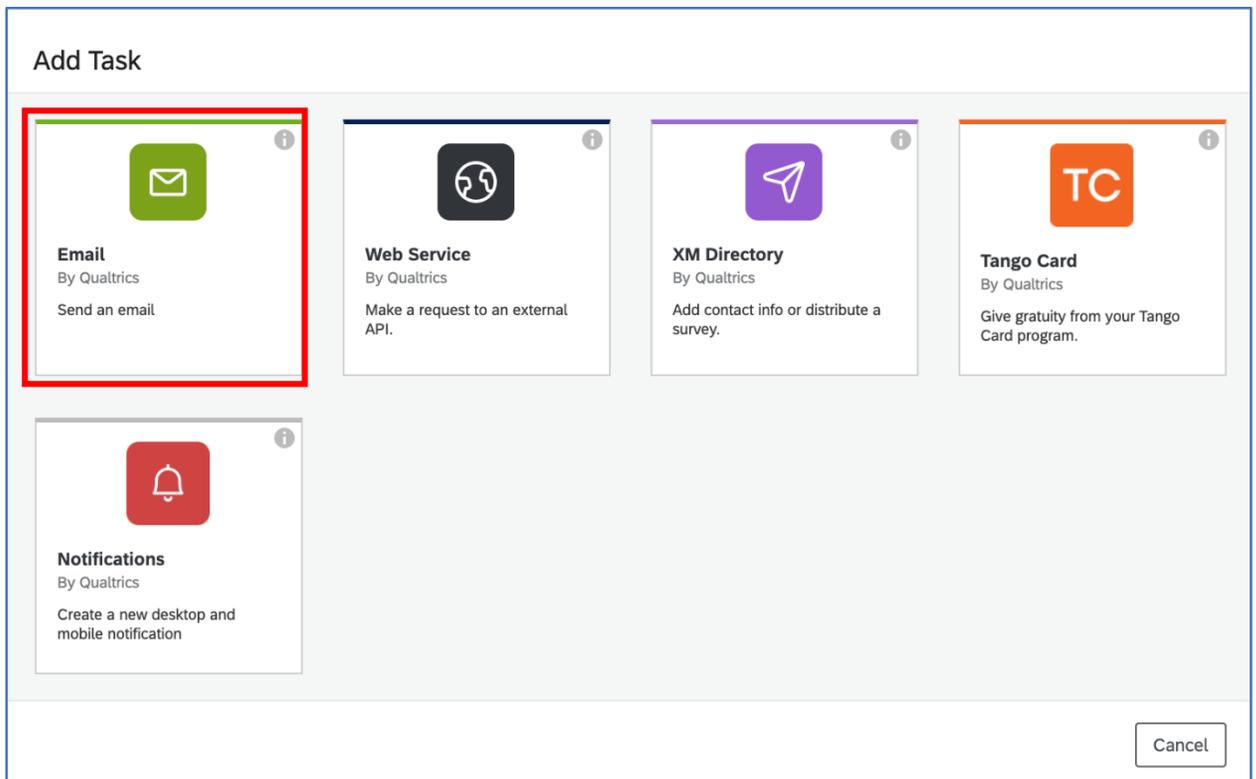
The screenshot shows a "New Action" configuration screen. At the top, it says "New Action" and "0 Tasks". Below that, there is a section "Select what starts the action" with a "Change" link. Underneath, there is a card for "Survey Response" with the text "Someone responded to Action Programming Example Survey" and an "Edit" button. Below this, there is a section "Perform the following" with two buttons: "+ Add conditions" (highlighted with a red box) and "+ Add Task".

B. Action to Send an Email (formerly Email Trigger)

B1. Click "+ Add Task"



B2. Click the Email tile.



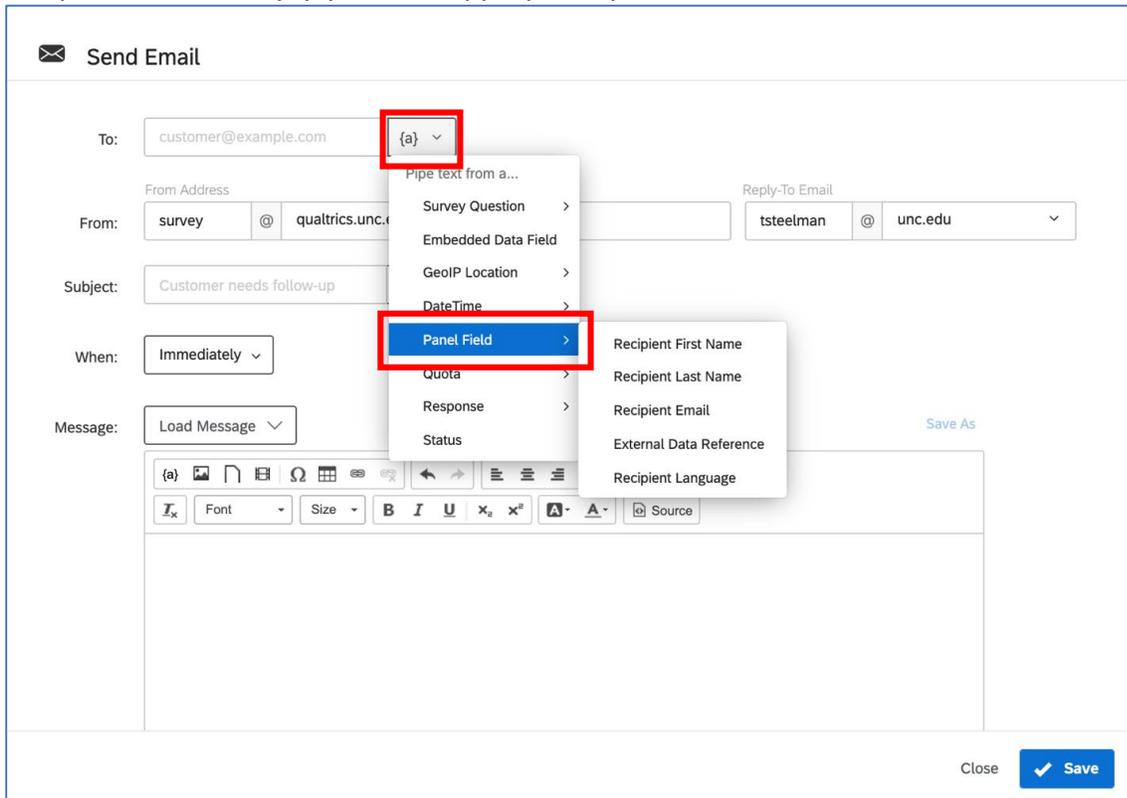
B3. Specify the details of the email to be sent.

The screenshot shows the 'Send Email' configuration interface. A red rectangular box highlights the 'To' field (containing 'customer@example.com'), the 'From' field (containing 'survey@qualtrics.unc.edu'), the 'From Name' field (containing 'Jane Doe'), the 'Reply-To Email' field (containing 'tsteelman@unc.edu'), the 'Subject' field (containing 'Customer needs follow-up'), and the 'When' field (set to 'Immediately'). Below these fields is a 'Message' section with a 'Load Message' dropdown and a rich text editor toolbar. At the bottom right, there are 'Close' and 'Save' buttons, with the 'Save' button also highlighted by a red box.

B4. To send email to an address provided by the respondent in the survey, pipe in the response to the appropriate survey question.

This screenshot shows the same 'Send Email' configuration interface as in B3. The 'To' field dropdown menu is open, showing a list of options. A red box highlights the '{a}' option. Another red box highlights the 'Survey Question' option in the dropdown menu. A search box is visible to the right of the dropdown menu, and the search results show 'Q1 Please type in your email address:' and 'Please type in your email address:'. The 'Save' button at the bottom right is also highlighted with a red box.

B5. To send an email to the email address on file for the member of the contact list who completed this survey, pipe in the appropriate panel field.

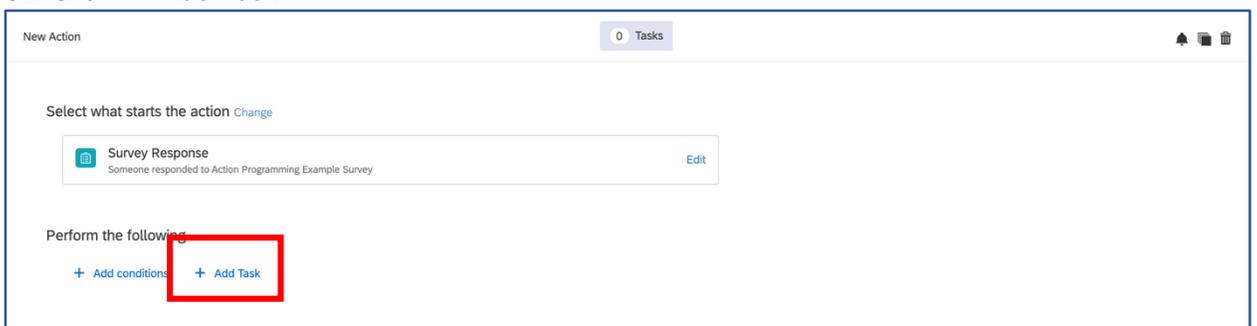


B6. "Save" the Email Action.

B7. Test the Action to make sure it works as desired.

C. Action to Add Survey Respondent to a Contact List (Formerly Contact List Trigger)

C1. Click "+ Add Task"



C2. Though UNC’s license does not include XM Directory, select the “XM Directory” tile for this task. (It will work.)

Add Task

The screenshot shows a grid of task tiles. The first row contains four tiles: 'Email' (green icon), 'Web Service' (dark blue icon), 'XM Directory' (purple icon, highlighted with a red border), and 'Tango Card' (orange icon). Below the first row is a fifth tile, 'Notifications' (red icon). Each tile includes a title, 'By Qualtrics', and a brief description. A 'Cancel' button is located at the bottom right of the interface.

- Email**
By Qualtrics
Send an email
- Web Service**
By Qualtrics
Make a request to an external API.
- XM Directory**
By Qualtrics
Add contact info or distribute a survey.
- Tango Card**
By Qualtrics
Give gratuity from your Tango Card program.
- Notifications**
By Qualtrics
Create a new desktop and mobile notification

Cancel

C3. Select “Add to XM Directory”

XM Directory Task

The screenshot shows a list of two options under the heading 'XM Directory Task'. The first option, 'Add to XM directory', is highlighted with a red box. The second option is 'Distribute survey'. At the bottom right, there are 'Close' and 'Save' buttons.

- Add to XM directory**
Add contact info or transaction details to your XM Directory
- Distribute survey**
Send a survey to an individual or contact list

Close

C4. Select the contact list the respondent should be added to from your contact library.

Add to XM Directory

Select contact list and XM Directory fields

Contact List
Select contact library... ▾

First Name Field Last Name Field Email Address

Select first name {a} ▾ Select last name {a} ▾ Select email address {a} ▾

Phone Number (optional) Language Field (optional) External Data Field (optional)

Select phone number {a} ▾ Select language {a} ▾ Select external data {a} ▾

[Add or remove embedded data fields](#)

Update recipient from survey response
 Unsubscribe the contact

Close

C5. Determine which of the pre-designated fields you wish to include in the new contact list record. First Name, Last Name, and Email address are currently required fields. (You can put placeholder text in these fields but they cannot be left blank.) Use the piped text dropdowns to indicate where the value for each field should be taken from. Most often this is from a response to a Survey Question or a Panel Field from an originating contact list.

The screenshot shows a web form titled "Add to XM Directory". The form is divided into sections for selecting a contact list and setting XM Directory fields. The "Last name" field is highlighted with a red box, and its dropdown menu is open, showing a search bar and a list of data sources. The "Survey Question" option is selected in the list.

Add to XM Directory

Select a contact list and set XM Directory fields

Contact List
Select contact library... ▾

First name Last name Email address
Select first name {a} ▾ Select last name {a} ▾ Select email address {a} ▾

Phone number (optional) External reference ID (optional)
Select phone number Pipe text from a... (optional) External reference ID (optional)
Add or remove embedded data fields

Update recipient from survey
 Unsubscribe the contact

Pipe text from a...
Survey Question >
Embedded Data Field
GeoIP Location >
DateTime >
Panel Field >
Quota >
Response >
Status

Q1 Please type in your email address: >
Q3 First Name: >
Q4 Last Name: >

Close Save

C6. You may add any other information collected or used in this respondent's survey to the contact list as well. To do this, click "Add or remove embedded data fields."

Add to XM Directory

Select contact list and XM Directory fields

Contact List

Select contact library... ▾

First Name Field Last Name Field Email Address

Select first name {a} ▾ Select last name {a} ▾ Select email address {a} ▾

Phone Number (optional) Language Field (optional) External Data Field (optional)

Select phone number {a} ▾ Select language {a} ▾ Select external data {a} ▾

Add or remove embedded data fields

Update recipient from survey response
 Unsubscribe the contact

Close

C7. Click “+ Add contact embedded data field.” Using one row for each embedded data field you wish to update, enter the name of the embedded data field on the left and use the pipe text drop down to indicate where the new value should come from.

The screenshot shows a dialog box titled "Add or remove embedded data fields". It contains a table with two columns: "Embedded Data Field" and "Field Value". The first row has "age" in the first column and "{a}" in the second column. A dropdown menu is open for the "{a}" field, listing options: "Survey Question", "Embedded Data Field", "GeolP Location", "DateTime", "Panel Field", "Quota", "Response", and "Status". Below the table is a blue button with a plus sign and the text "+ Add contact embedded data field". To the right of the dropdown is a red "X" button. At the bottom right of the dialog is a "Close" button.

C8. Click “Close” to save selections in this submenu

C9. When all contact list information has been specified, click “Save.”

C10. Test the Action to ensure it works as desired.