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.

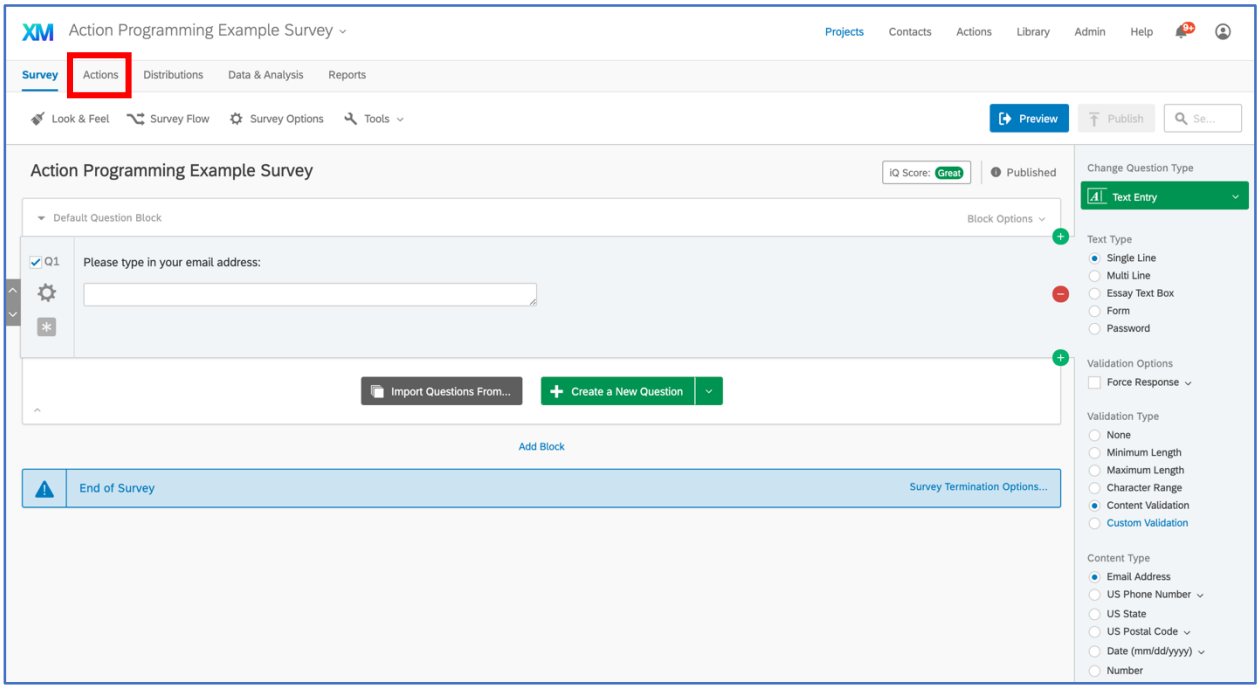
All Actions should be tested after they are set up!

Contents

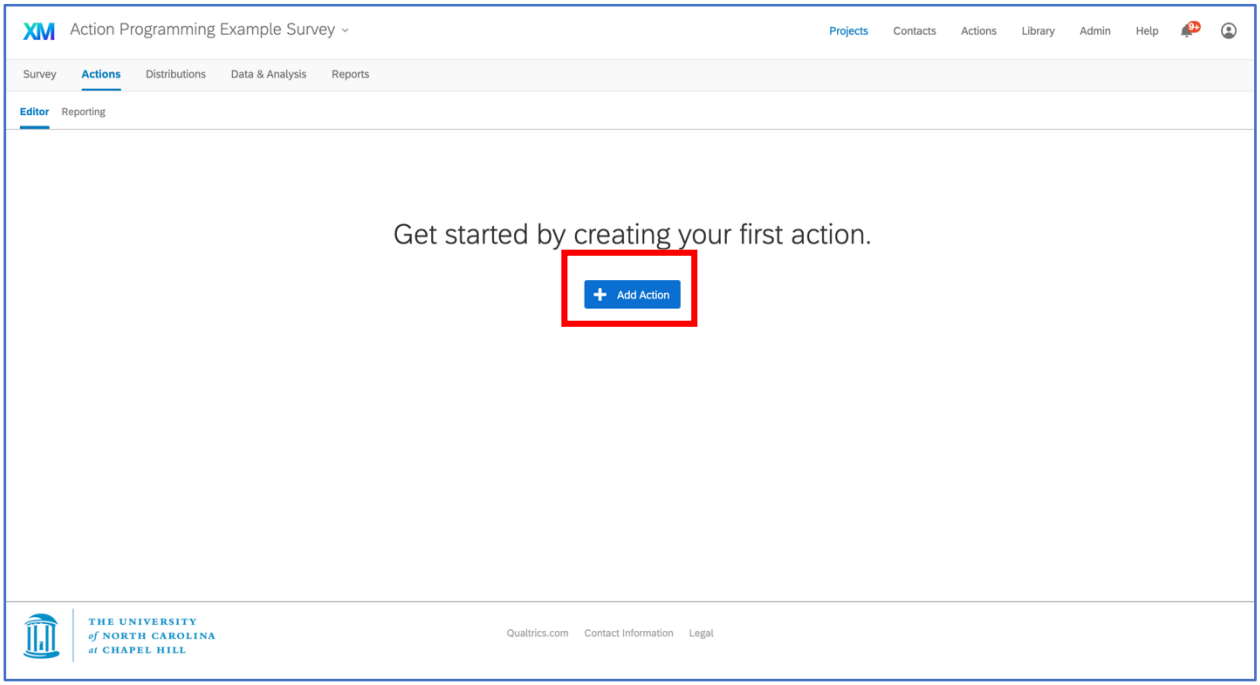
A. Create an Action to Occur When a Respondent Completes the Survey (All trigger types)

All trigger actions begin with the steps in this section.

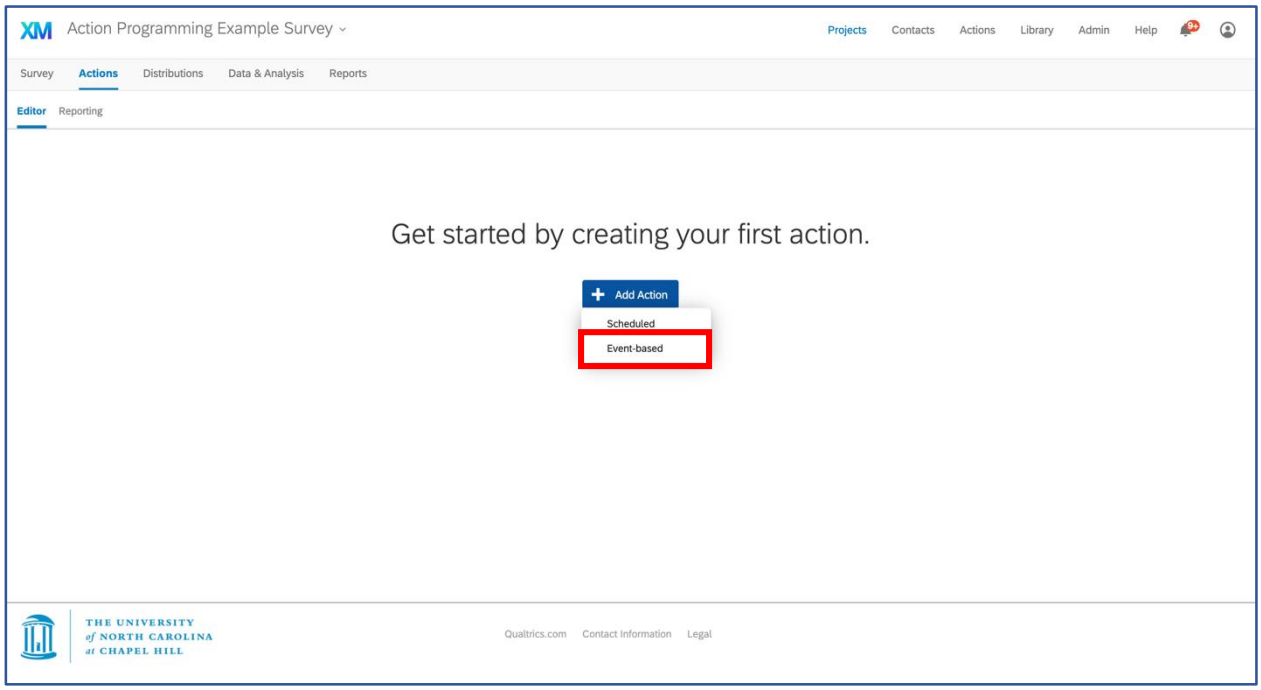
A1. Click “Actions” on the survey editor page.



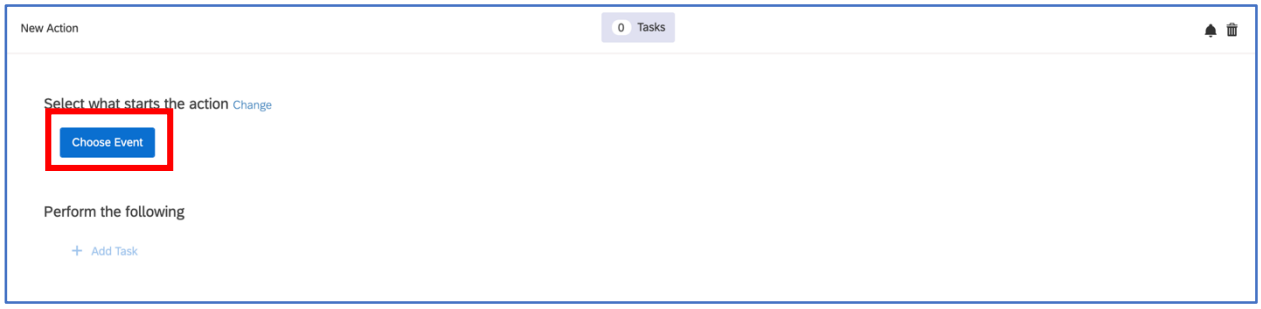
A2. Click “Add Action”



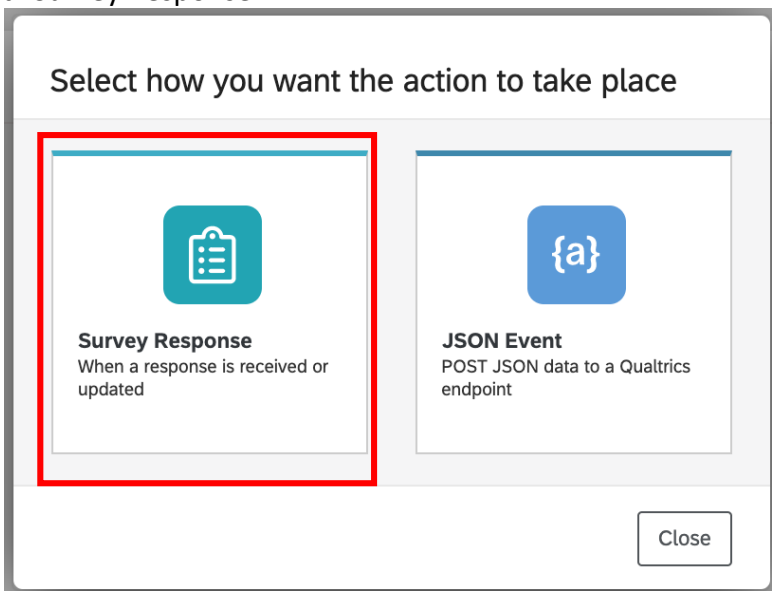
A3. Select “Event Based”



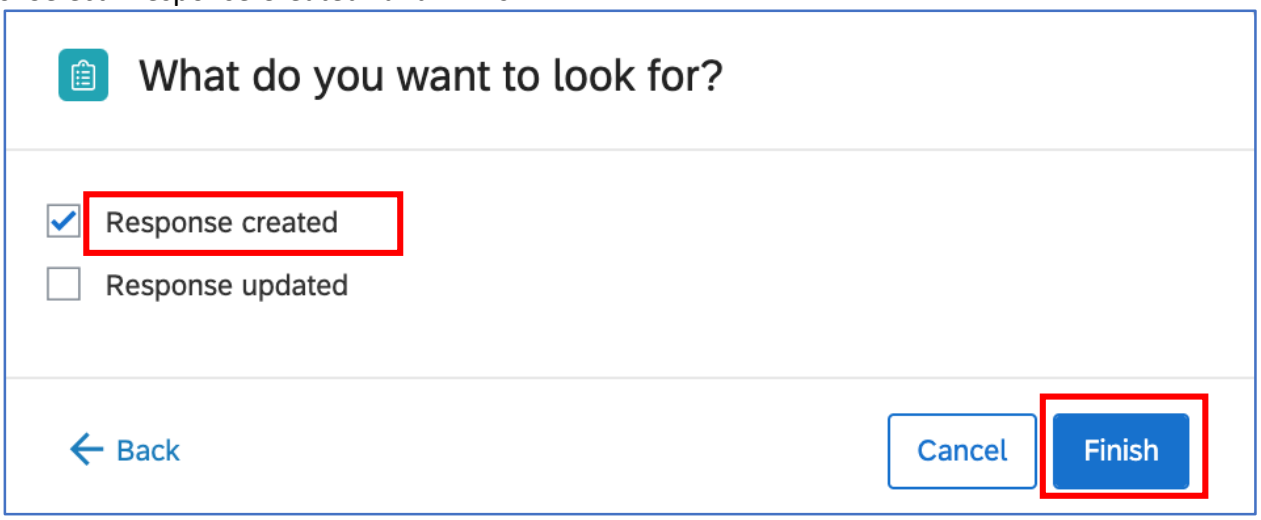
A4. Click “Choose Event”



A5. Select “Survey Response”

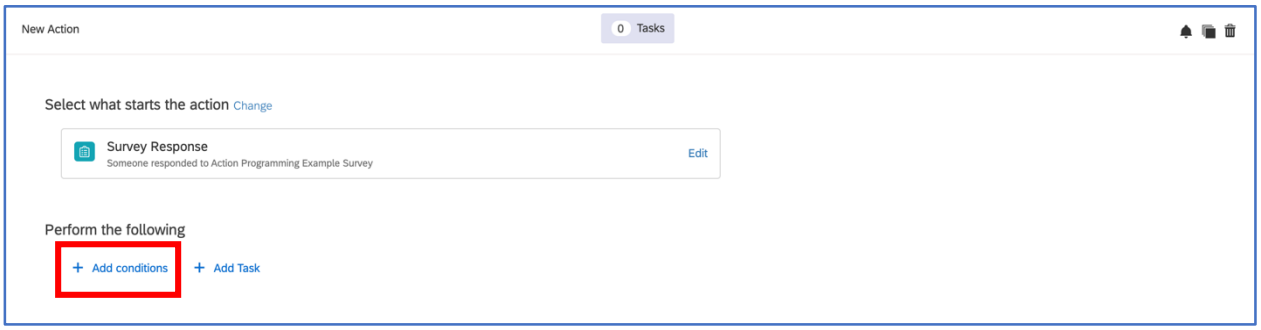


A6. Select “Response Created” and “Finish”



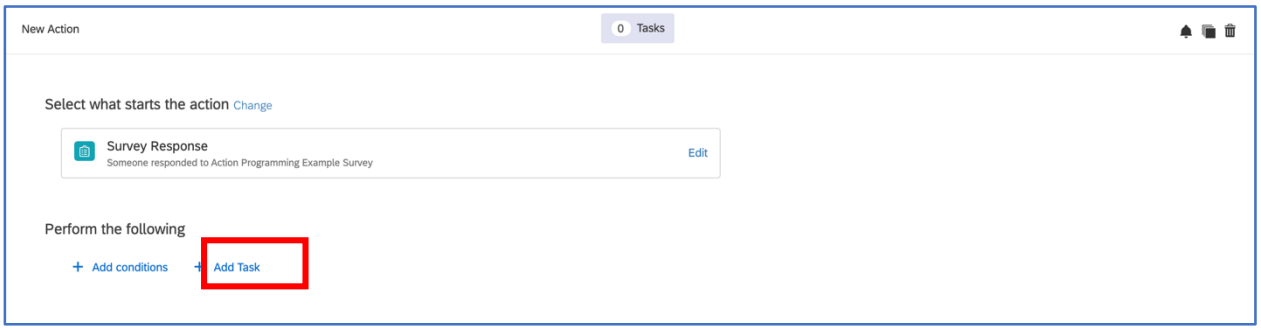
A7. If the trigger/action is to occur every time any respondent completes the survey, proceed now to Section B, C, or D.

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.

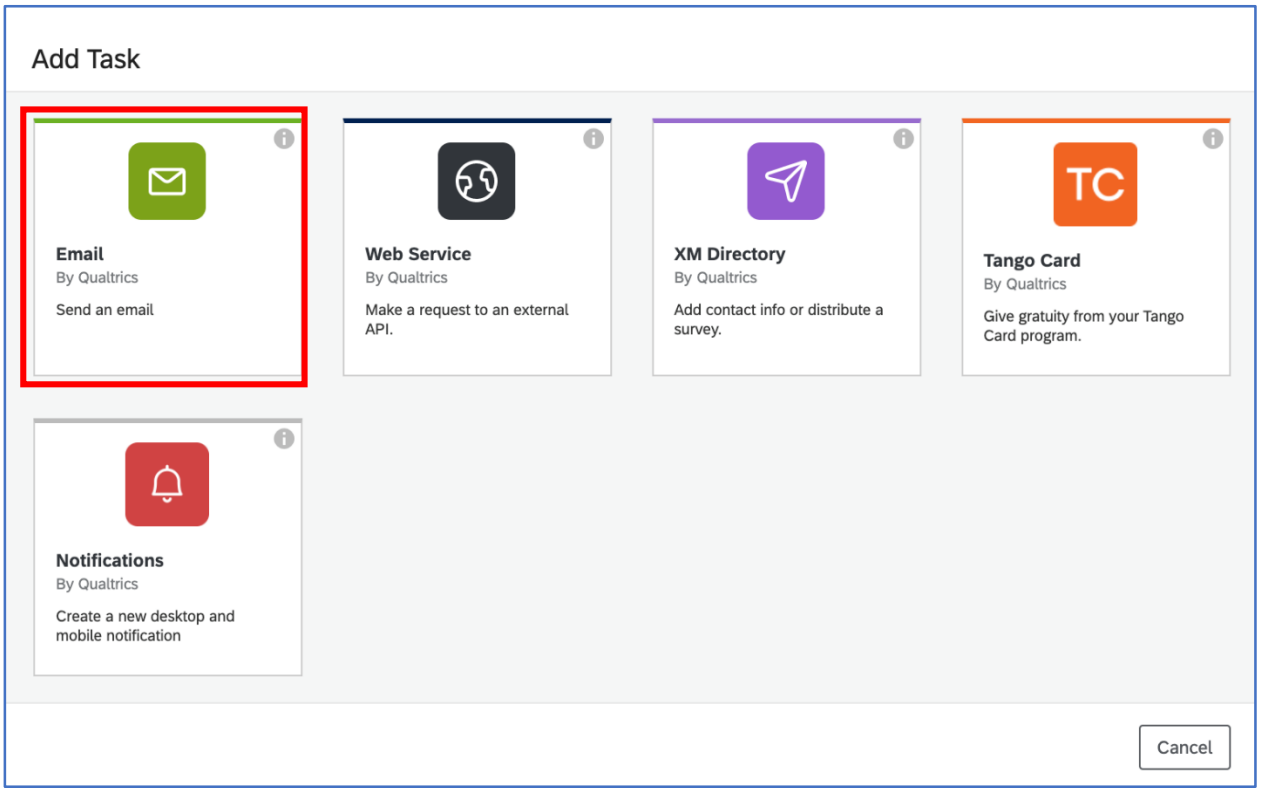


B. Action to Send an Email (formerly Email Trigger)

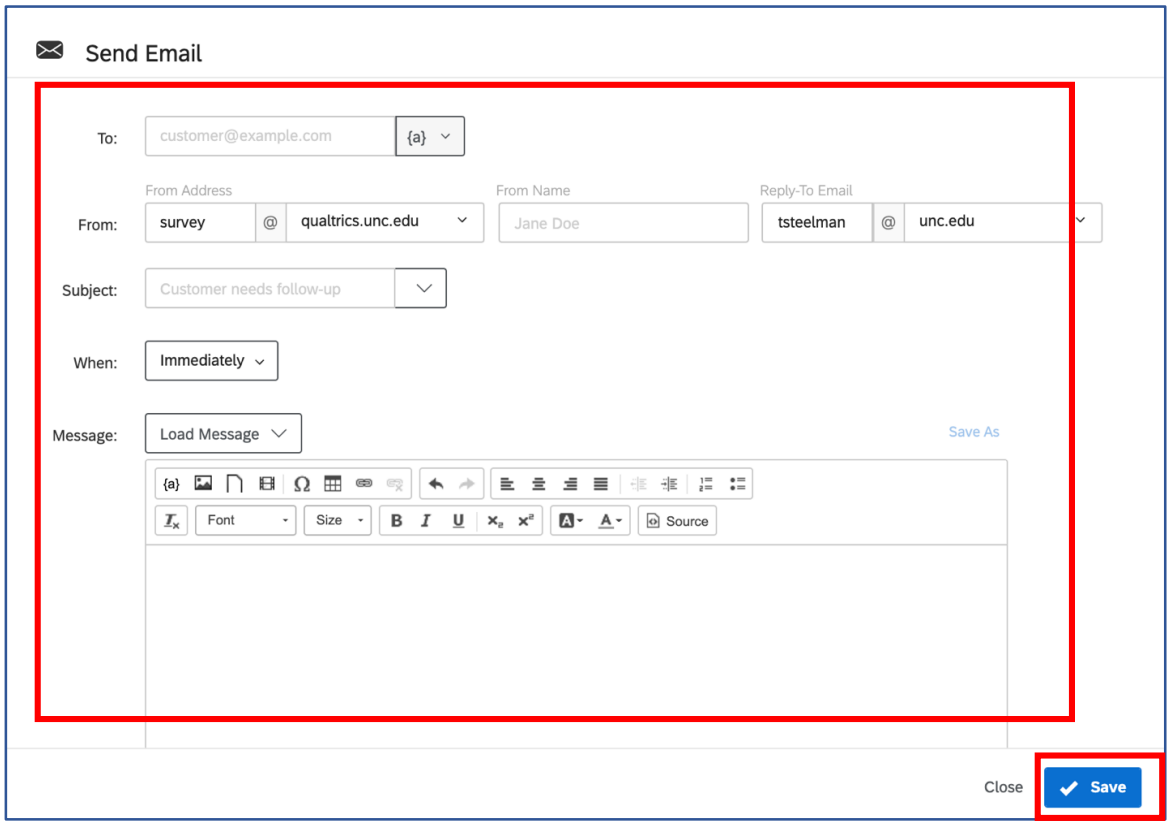
B1. Click “+ Add Task”



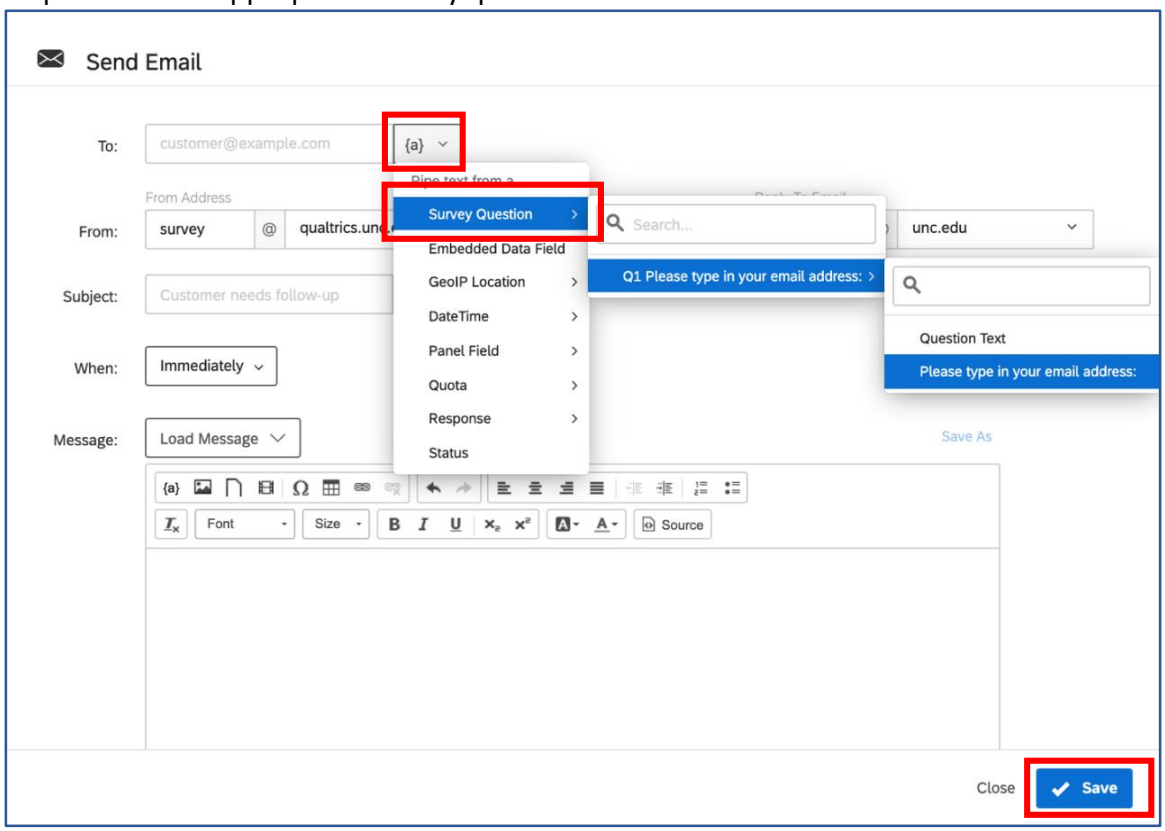
B2. Click the Email tile.



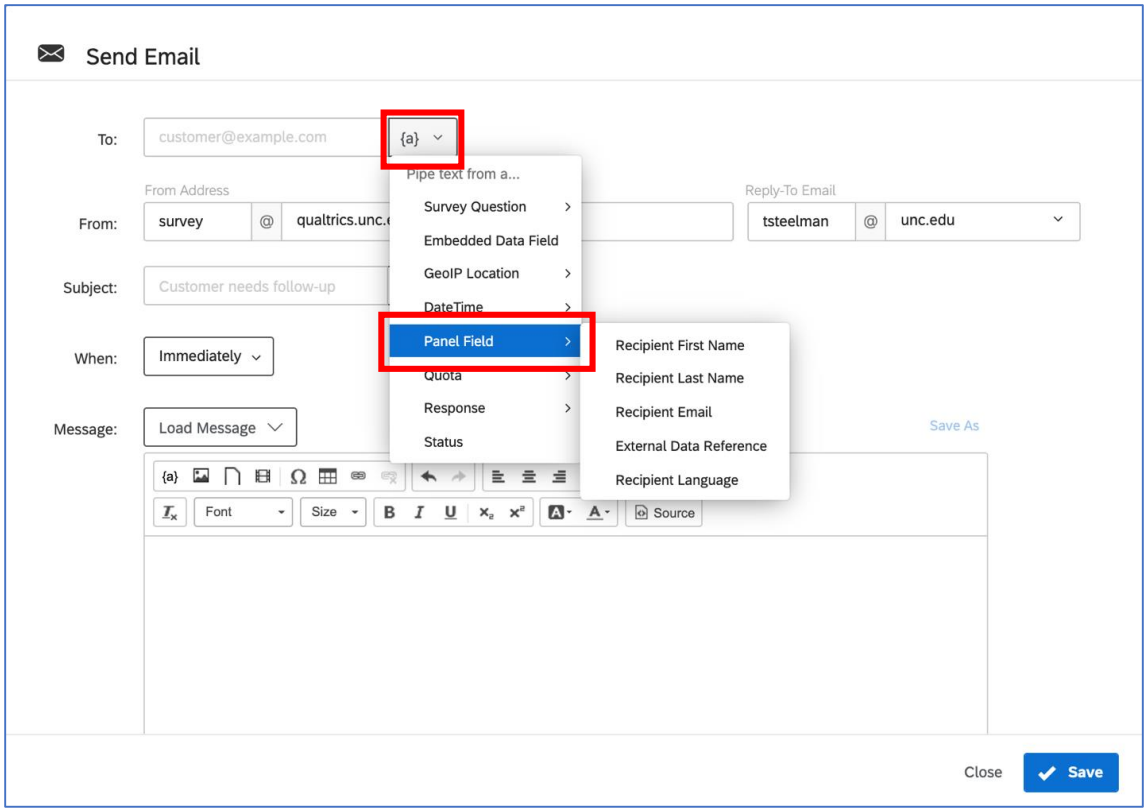
B3. Specify the details of the email to be sent.



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



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.

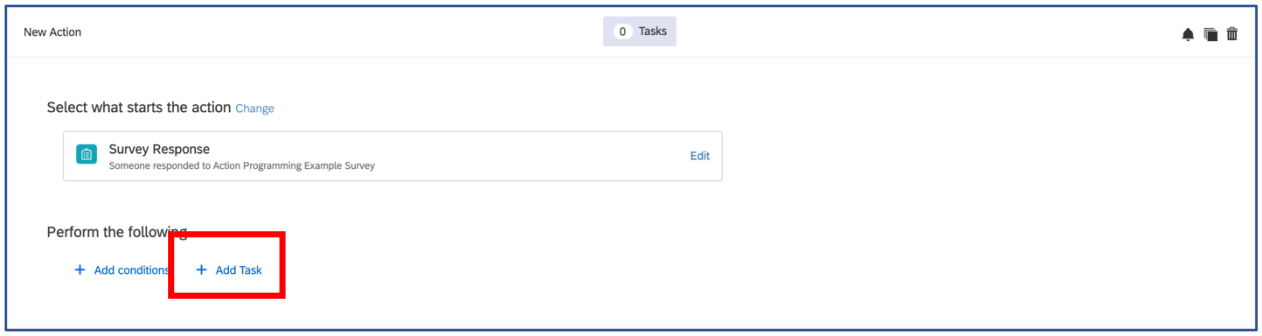


B6. "Save" the Email Action.

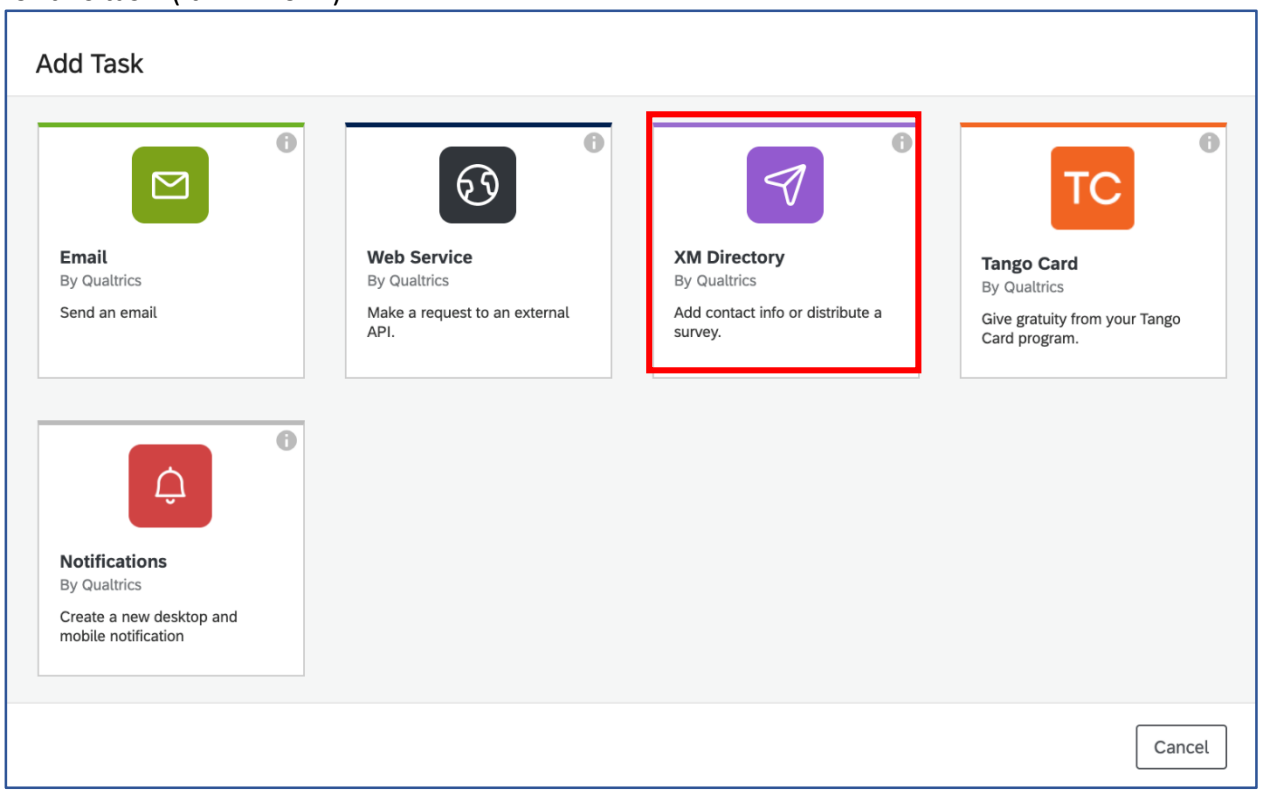
B7. Test the Action to make sure it works as desired.

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

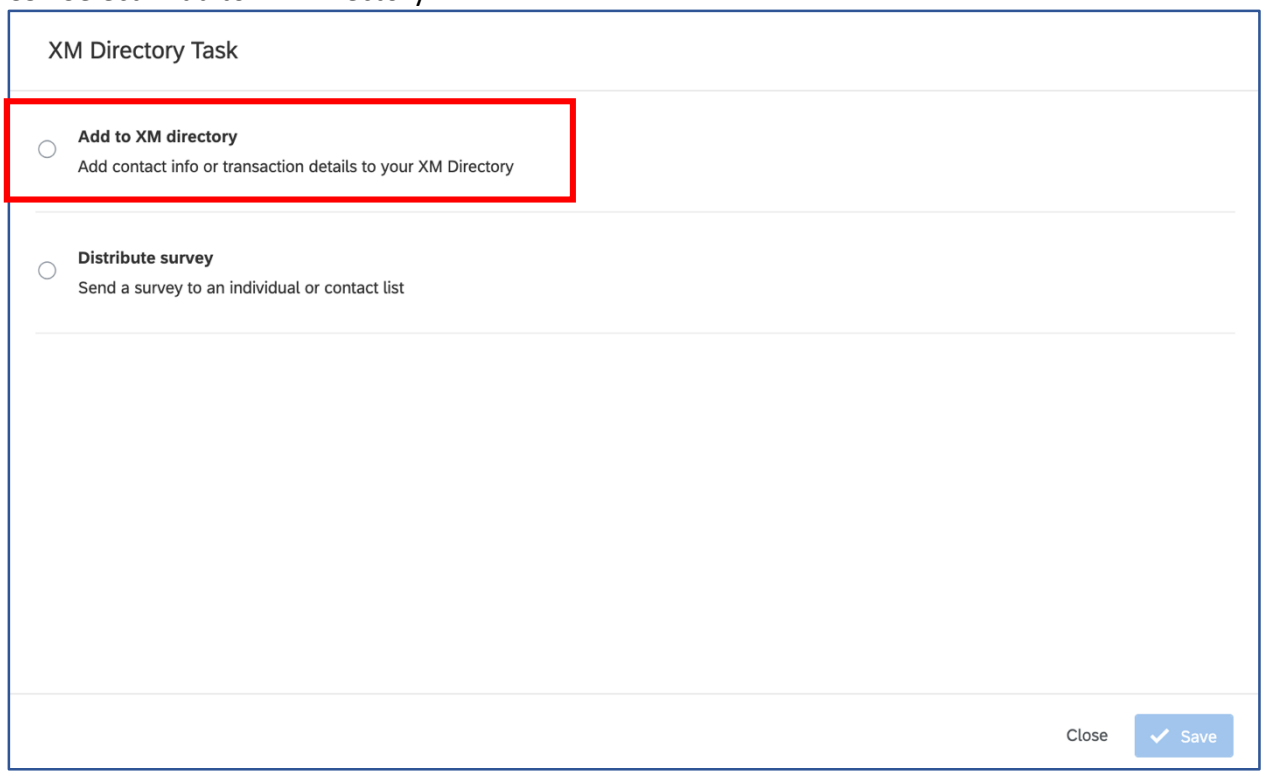
C1. Click "+ Add Task"



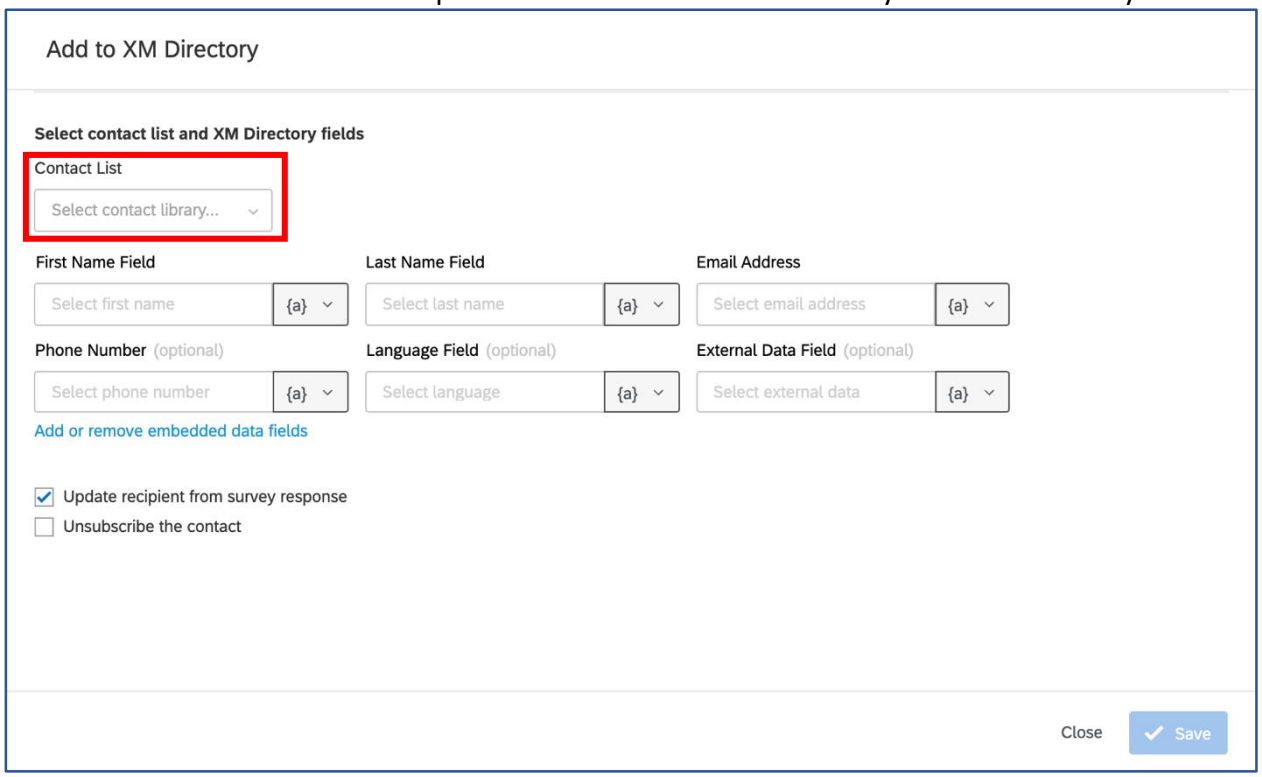
C2. Though UNC's license does not include XM Directory, select the "XM Directory" tile for this task. (It will work.)



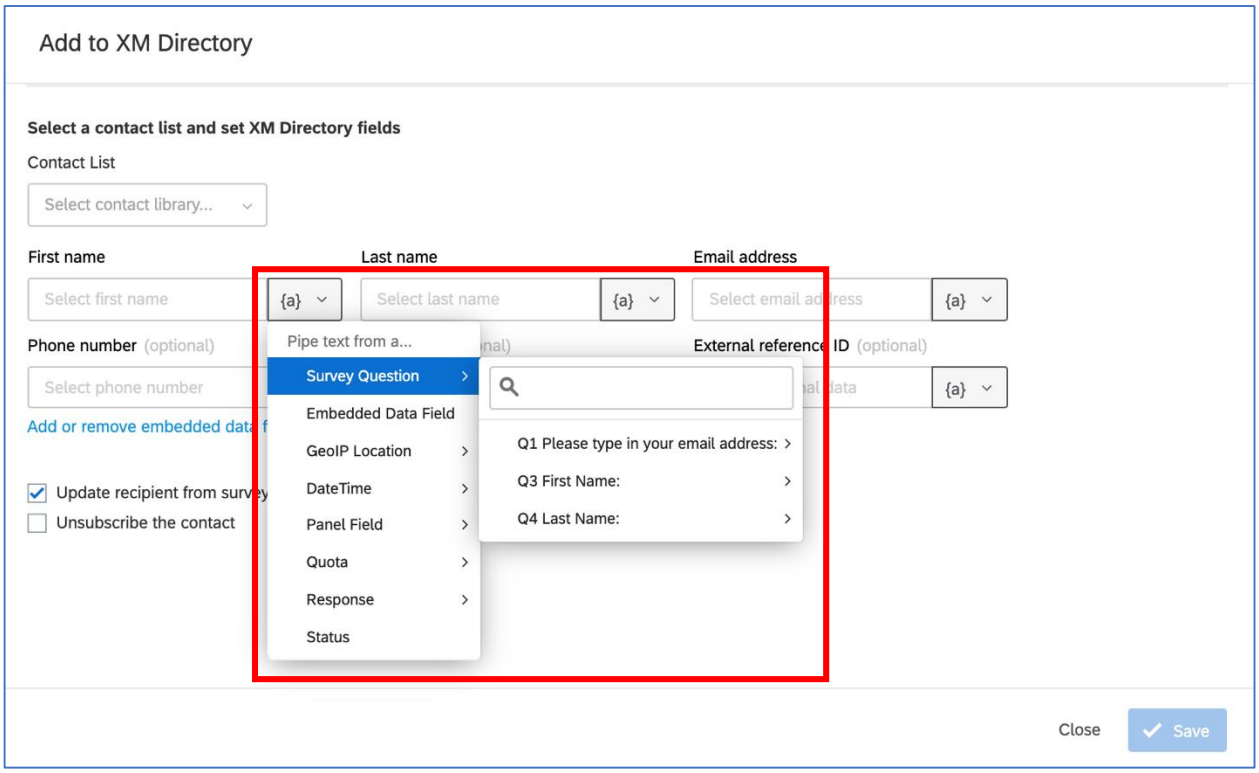
C3. Select "Add to XM Directory"



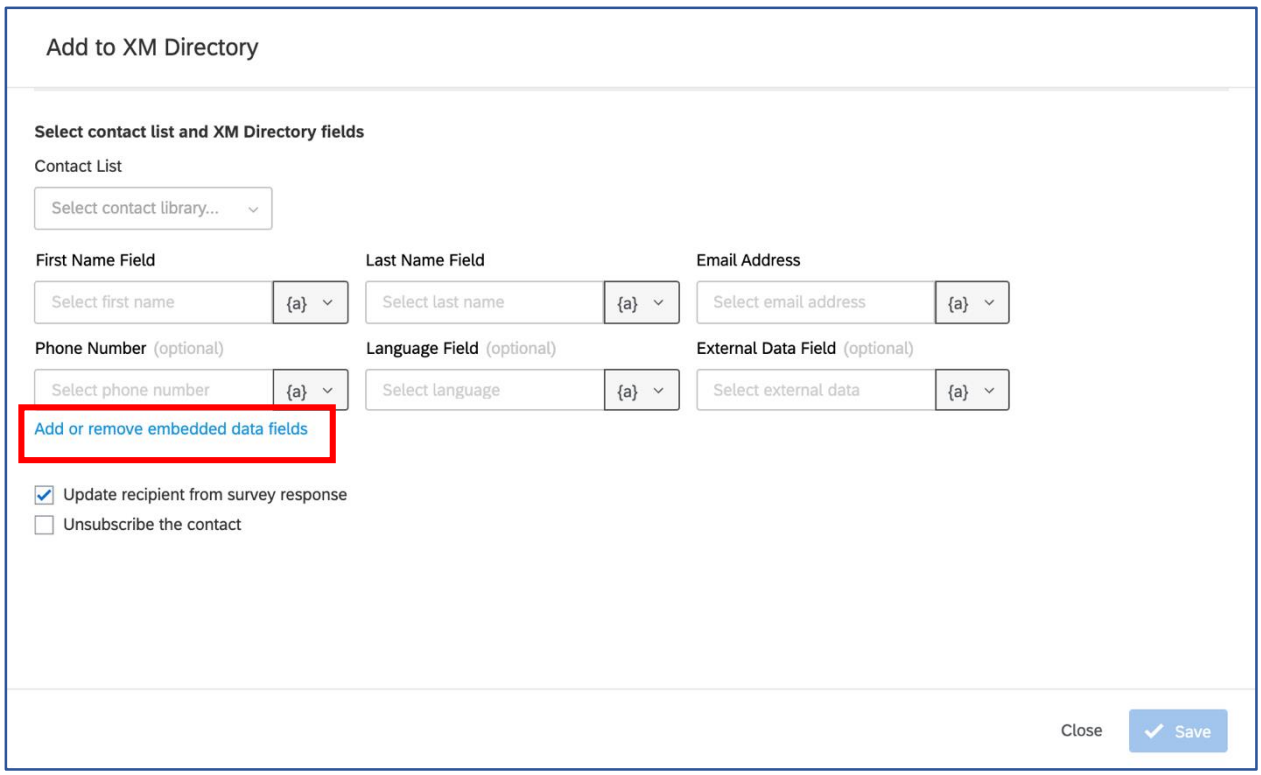
C4. Select the contact list the respondent should be added to from your contact library.



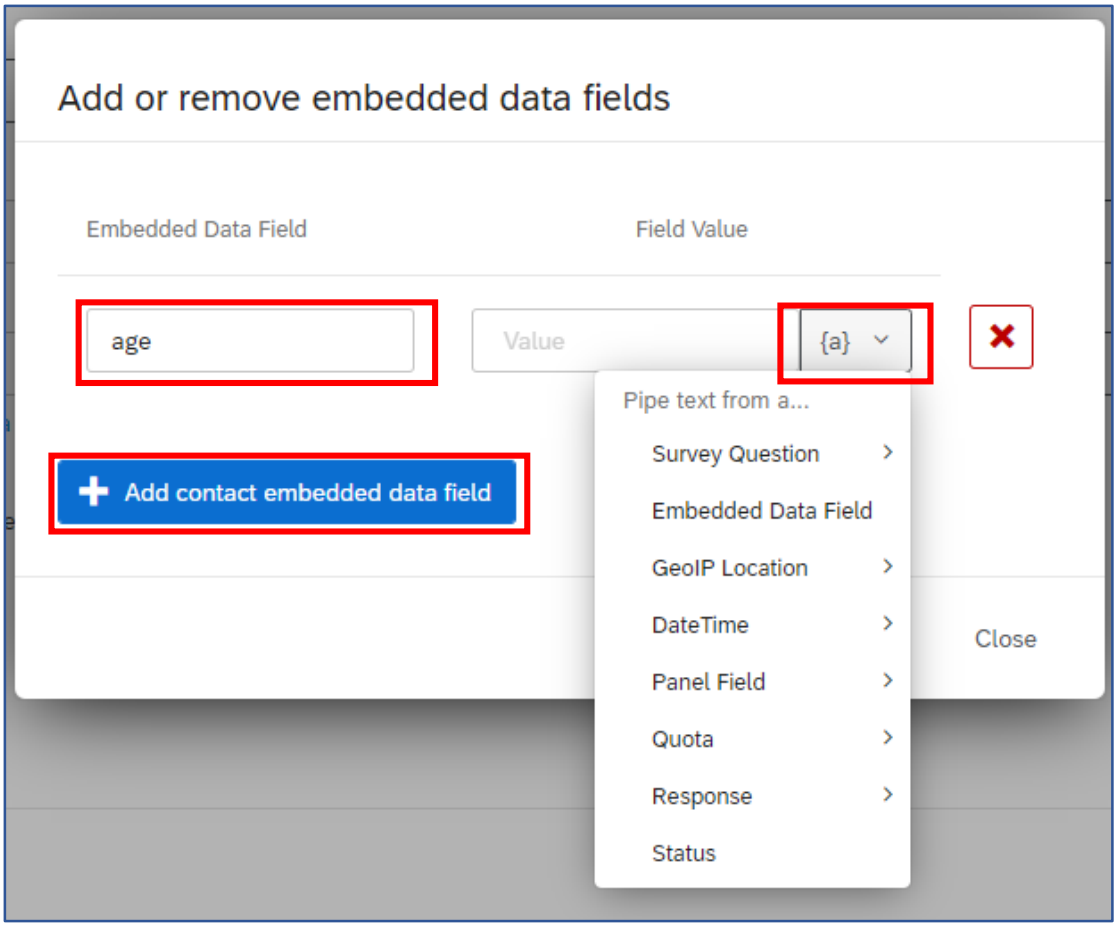
C5. Determine which of the pre-designated fields you wish to include in the new contact list record. First Name, Last Name, and Email address are currently required fields. (You can put placeholder text in these fields but they cannot be left blank.) Use the piped text dropdowns to indicate where the 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.



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."



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.



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.