

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!

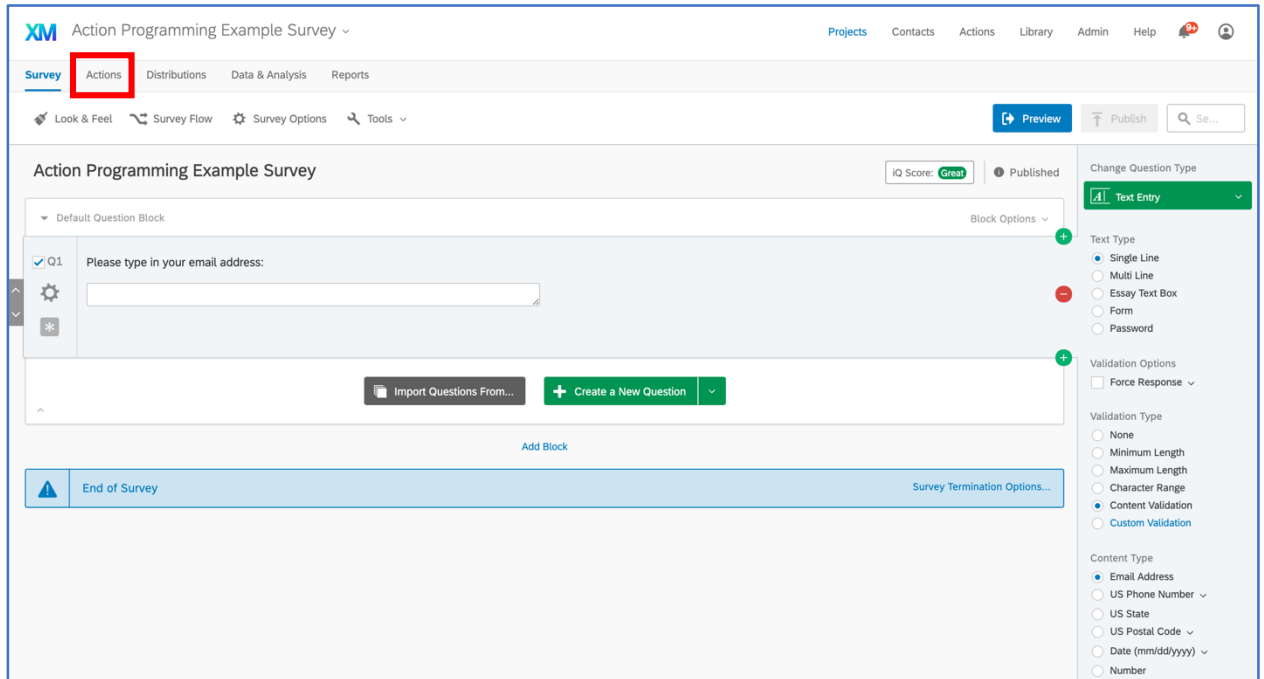
Contents

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)

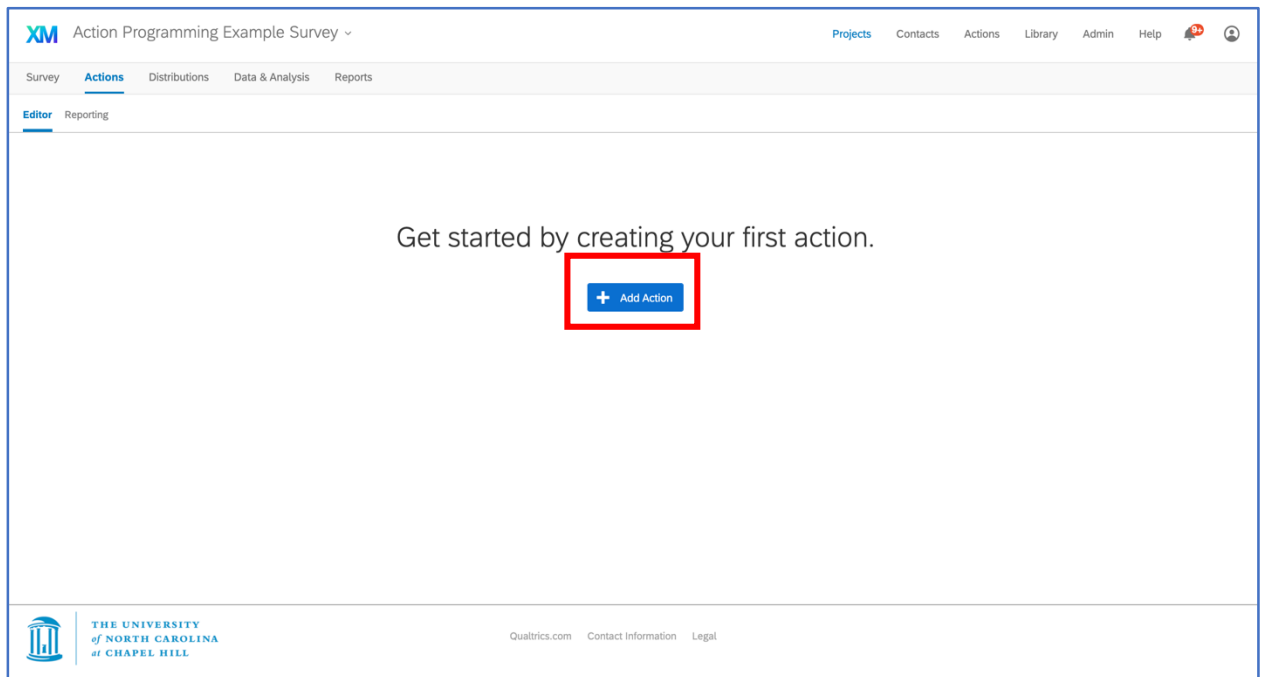
All trigger actions begin with the steps in this section.

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



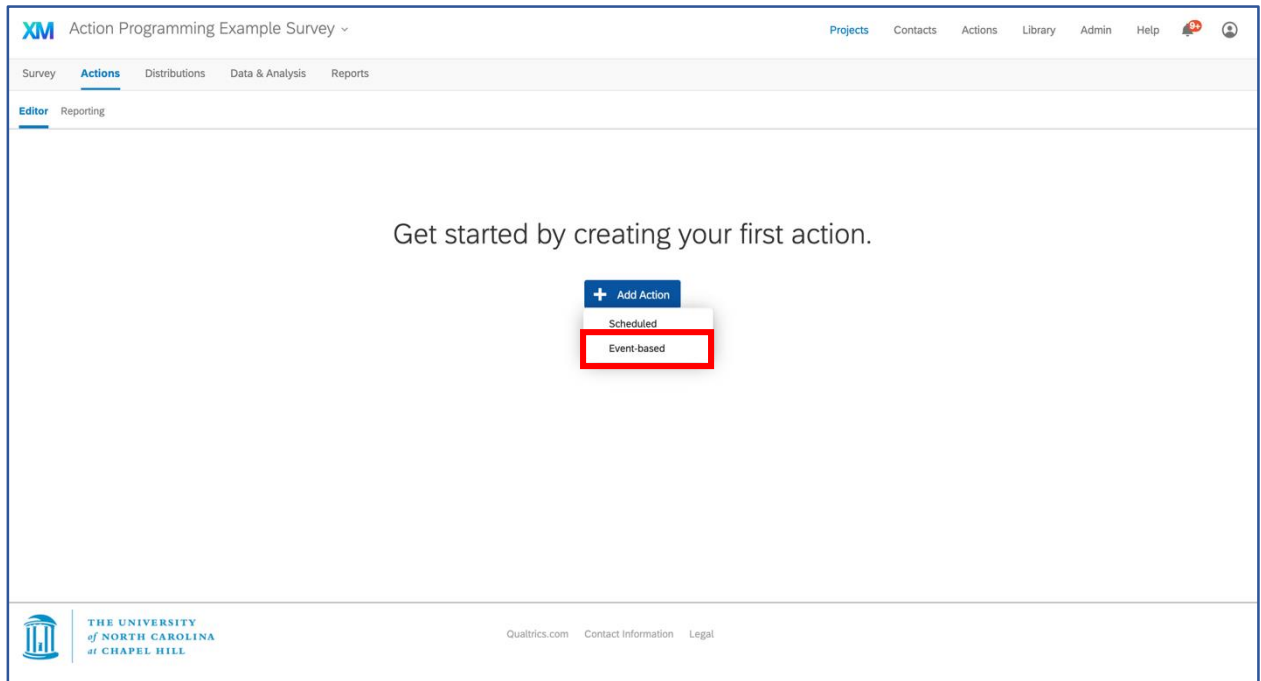
The screenshot shows the 'Action Programming Example Survey' editor. The 'Actions' tab is selected and highlighted with a red box. The main area displays a question block for 'Please type in your email address:'. On the right, the 'Text Entry' question type is selected. Below the question, there are buttons for 'Import Questions From...', 'Create a New Question', and 'Add Block'. At the bottom, there is a blue bar with 'End of Survey' and 'Survey Termination Options...'. The right sidebar contains settings for 'Text Type' (Single Line, Multi Line, Essay Text Box, Form, Password), 'Validation Options' (Force Response), 'Validation Type' (None, Minimum Length, Maximum Length, Character Range, Content Validation, Custom Validation), and 'Content Type' (Email Address, US Phone Number, US State, US Postal Code, Date, Number).

A2. Click “Add Action”

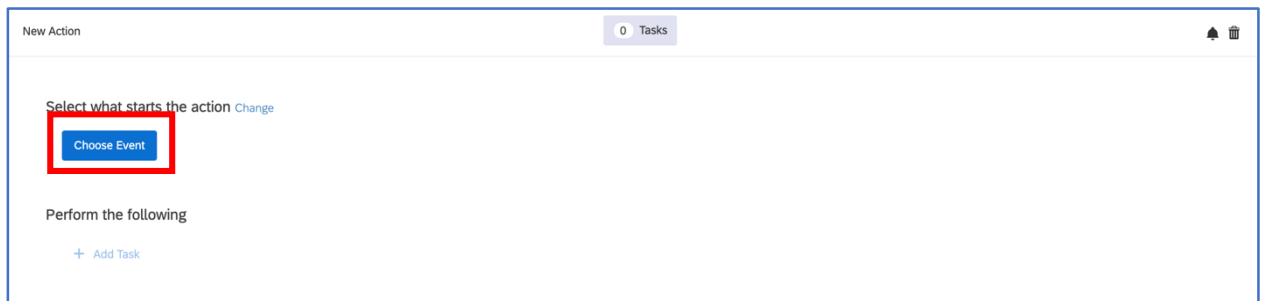


The screenshot shows the 'Add Action' screen. The text 'Get started by creating your first action.' is centered. Below it, a blue button with a plus sign and the text 'Add Action' is highlighted with a red box. The footer includes the University of North Carolina at Chapel Hill logo and the text 'Qualtrics.com Contact Information Legal'.

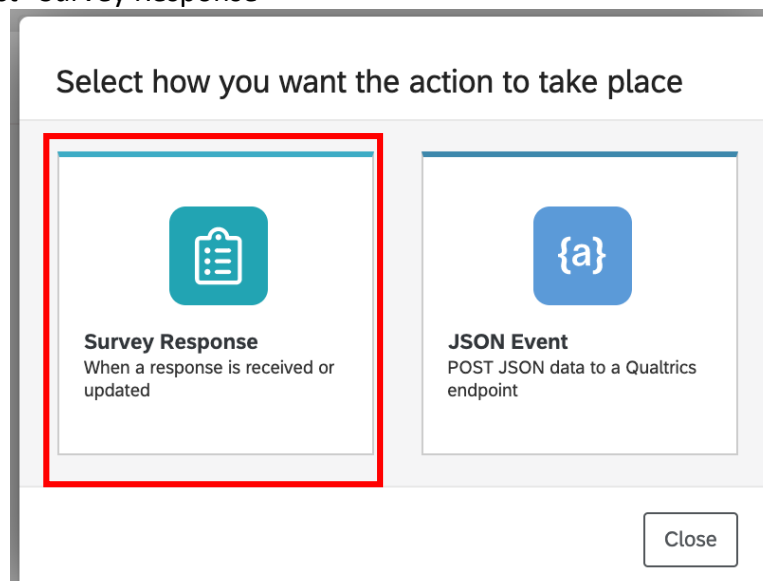
A3. Select “Event Based”



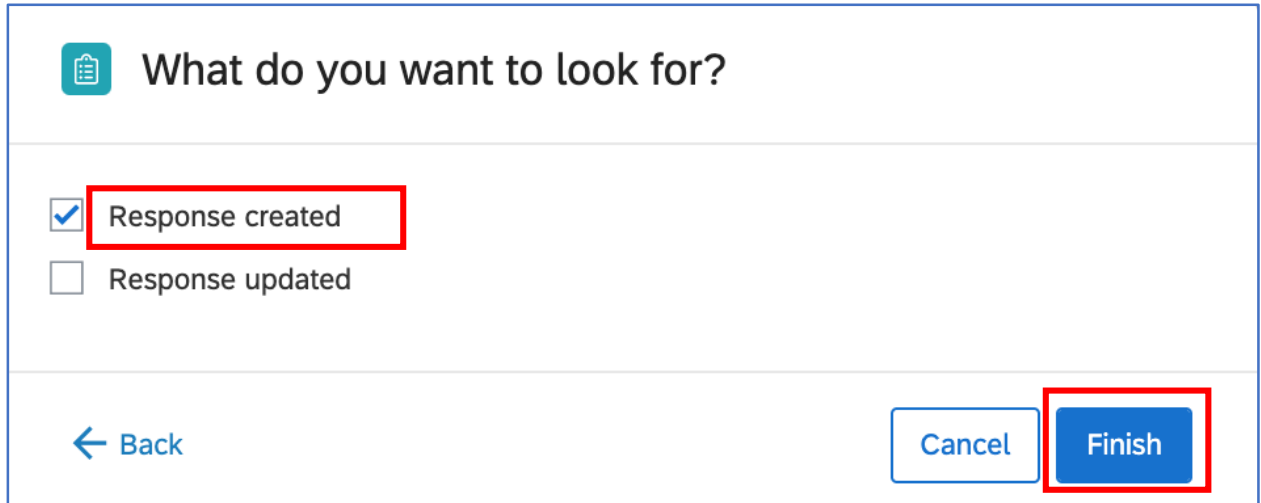
A4. Click “Choose Event”



A5. Select “Survey Response”



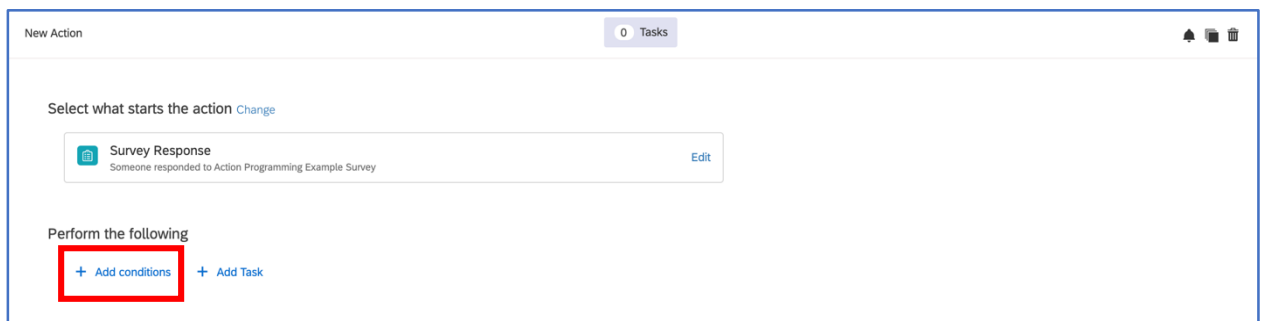
A6. Select “Response Created” and “Finish”



The screenshot shows a dialog box titled "What do you want to look for?". It contains two checkboxes: "Response created" (checked) and "Response updated" (unchecked). The "Response created" checkbox is highlighted with a red rectangle. At the bottom, there are three buttons: "Back" (with a left arrow), "Cancel", and "Finish". The "Finish" button is highlighted with a red rectangle.

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

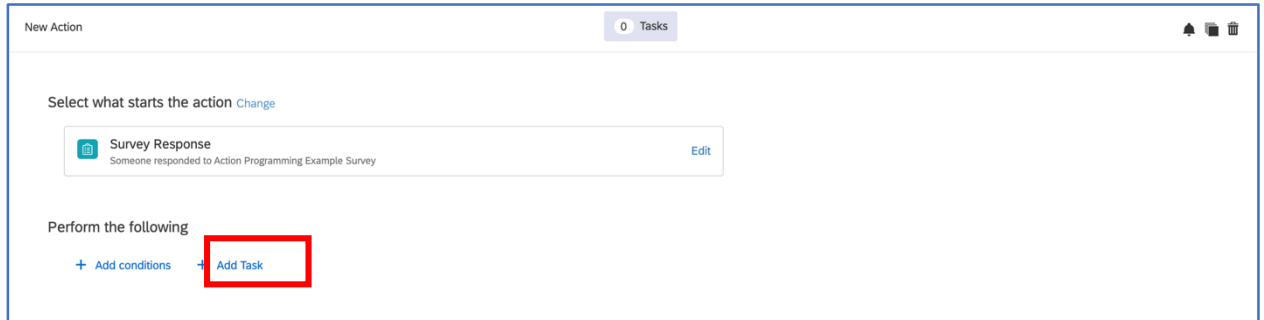
If the action is only to occur under certain conditions (for example, only if respondent answers “yes” to a particular question or indicates that their contact information has changed), click “+ Add condition” and follow the prompts (steps not shown here.) Then proceed to Section B, C, or D.



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

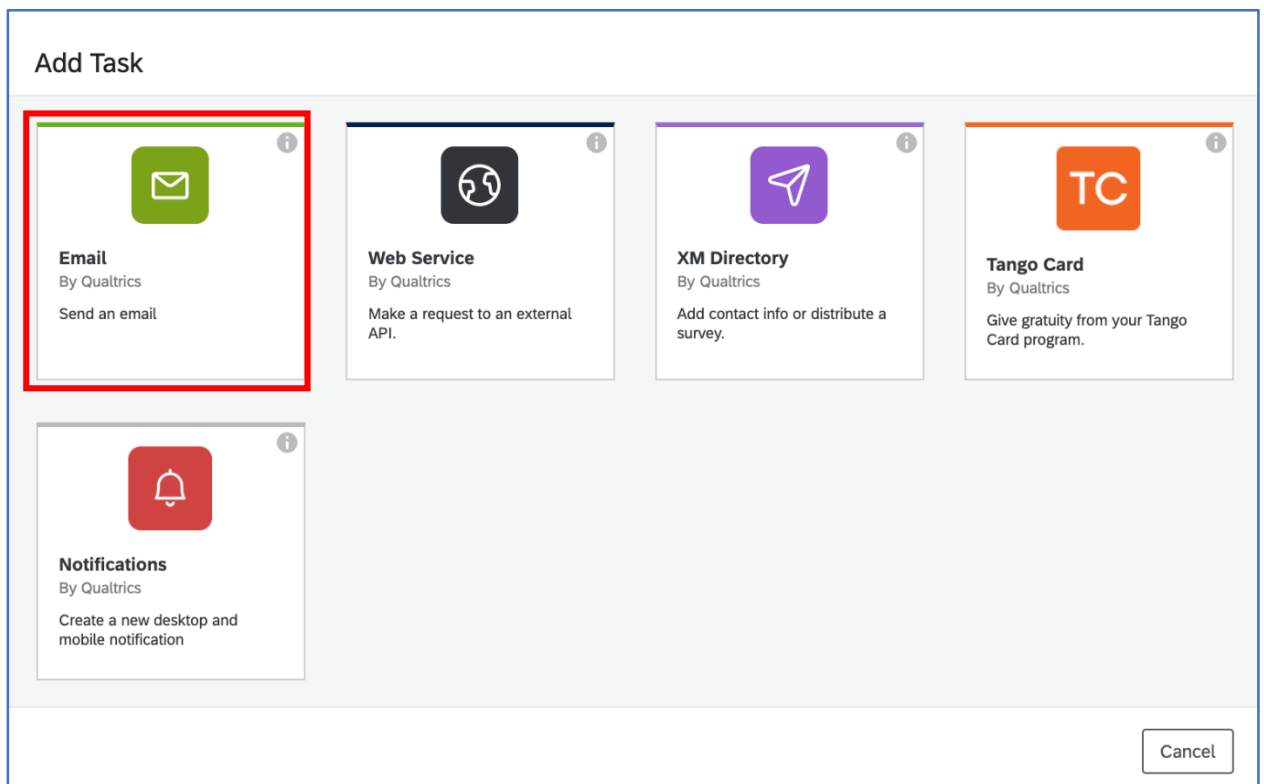
B. Action to Send an Email (formerly Email Trigger)

B1. Click “+ Add Task”



The screenshot shows the 'New Action' configuration window. At the top, it says 'New Action' and '0 Tasks'. Below this, there's a section 'Select what starts the action' with a 'Change' link. A 'Survey Response' trigger is selected, with the description 'Someone responded to Action Programming Example Survey' and an 'Edit' link. Under the heading 'Perform the following', there are two links: '+ Add conditions' and '+ Add Task', which is highlighted with a red rectangle.

B2. Click the Email tile.



The screenshot shows the 'Add Task' dialog. It contains several task tiles, each with an icon, a title, a provider, and a description. The 'Email' tile, which has a green envelope icon and the text 'Email By Qualtrics Send an email', is highlighted with a red rectangle. Other tiles include 'Web Service' (black globe icon), 'XM Directory' (purple paper plane icon), 'Tango Card' (orange 'TC' icon), and 'Notifications' (red bell icon). A 'Cancel' button is located at the bottom right of the dialog.

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

The screenshot shows the 'Send Email' interface. A red rectangular box highlights the 'To' field (containing 'customer@example.com'), the 'From' field (containing 'survey' and '@ qualtrics.unc.edu'), the 'From Name' field (containing 'Jane Doe'), the 'Reply-To Email' field (containing 'tsteelman' and '@ unc.edu'), the 'Subject' field (containing 'Customer needs follow-up'), and the 'When' field (containing 'Immediately'). The 'Message' field is also visible 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 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.

The screenshot shows the 'Send Email' interface with a dropdown menu open for the 'To' field. The dropdown menu lists various survey fields: 'Survey Question', 'Embedded Data Field', 'GeoIP Location', 'DateTime', 'Panel Field', 'Quota', 'Response', and 'Status'. The 'Survey Question' option is highlighted. A search bar is visible next to the dropdown. 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.

The screenshot shows the 'Send Email' configuration window. The 'To' field is set to 'customer@example.com'. A dropdown menu is open, showing various options for piping text into the email. The 'Panel Field' option is highlighted with a red box. The 'From' field is 'survey@qualtrics.unc.edu' and the 'Reply-To' field is 'tsteelman@unc.edu'. The 'Subject' is 'Customer needs follow-up'. The 'When' is set to 'Immediately'. The 'Message' is 'Load Message'. A 'Save As' button is visible on the right. At the bottom, there are 'Close' and 'Save' buttons.

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”


The screenshot shows the 'New Action' configuration window. The 'Select what starts the action' section shows 'Survey Response' as the trigger. The 'Perform the following' section has a red box around the '+ Add Task' button.

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


Add Task




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

☐ **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
Select first name {a} ▾

Last Name Field
Select last name {a} ▾

Email Address
Select email address {a} ▾

Phone Number (optional)
Select phone number {a} ▾

Language Field (optional)
Select language {a} ▾

External Data Field (optional)
Select external data {a} ▾

[Add or remove embedded data fields](#)

☒ Update recipient from survey response
☐ Unsubscribe the contact

Close

✓ Save

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.

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} ▾ Pipe text from a... Survey Question > Embedded Data Field GeoIP Location > DateTime > Panel Field > Quota > Response > Status	Select last name {a} ▾ Select email address {a} ▾
Phone number (optional) Select phone number		External reference ID (optional) Select external data {a} ▾

[Add or remove embedded data fields](#)

☒ Update recipient from survey
☐ Unsubscribe the contact

Close

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". In the "Embedded Data Field" column, the text "age" is entered. In the "Field Value" column, a dropdown menu is open, showing "Pipe text from a..." with a list of options: "Survey Question", "Embedded Data Field", "GeoIP Location", "DateTime", "Panel Field", "Quota", "Response", and "Status". The current selection is "{a}". A red "X" button is located to the right of the dropdown. A blue button with a plus icon and the text "+ Add contact embedded data field" is located at the bottom left. A "Close" button is located at the bottom right.

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.