

Qualtrics – Actions (automated emails)

Actions allow you to set up emails to be sent out based on the response given in the survey.

Examples of common Action Emails include:

- x Confirmation email / Follow up information
- x Notification to a department or individual that a survey/form has been completed
- x Reference Checks
- x Approval Chains

Previously, this was done using Triggers, but Qualtrics is phasing out the Trigger emails and we have had several instances where current Trig

3. Choose your Event – Select Survey Response, and check Response Created

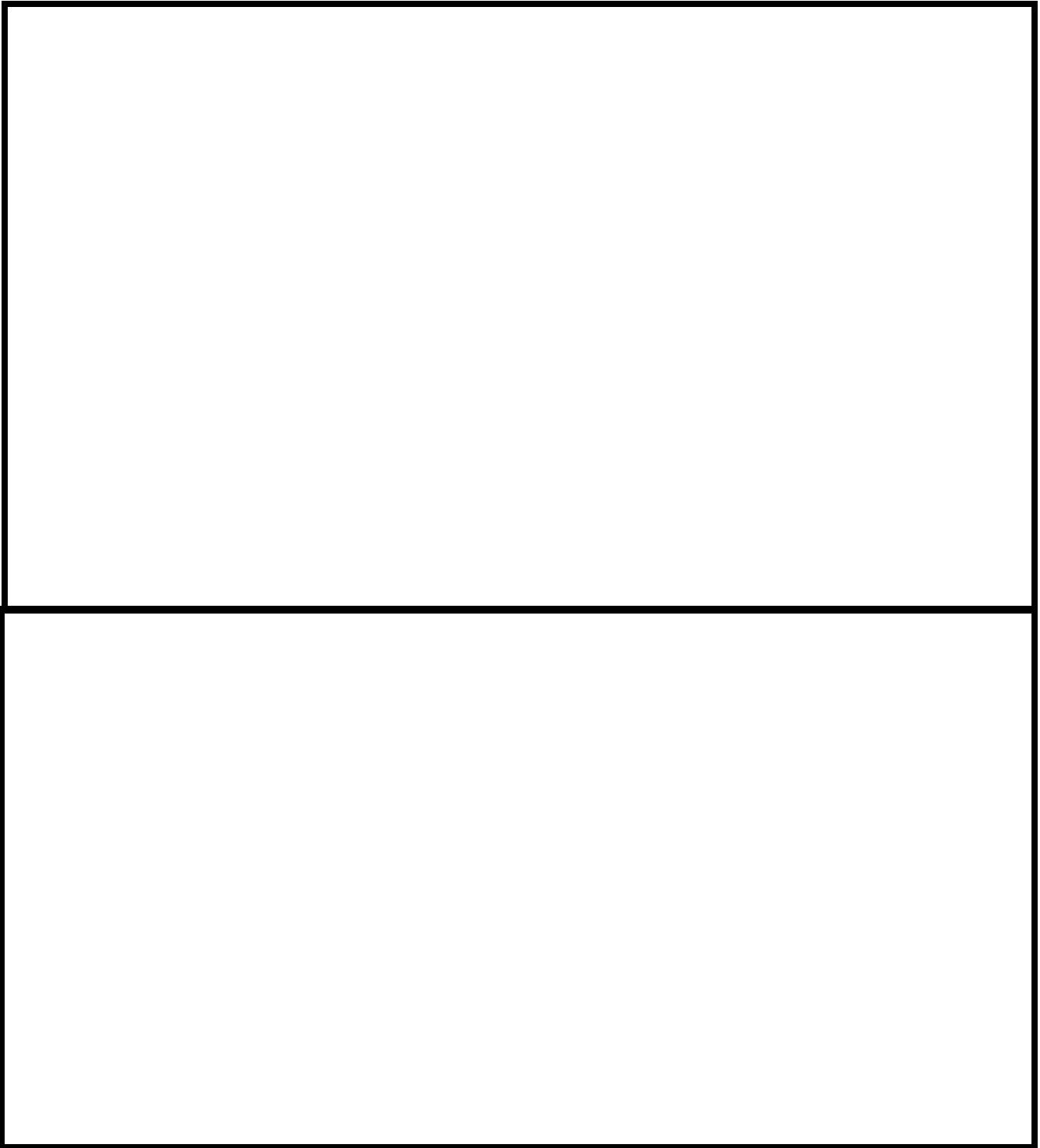
4. Add Conditions – Use this feature when you need the Action Email to be sent to someone based on how they answered a survey question. For example, you may want one version of the Action Email to be sent to students who indicated their academic advisor is John Doe. BE SURE AND CLICK “DONE EDITING” or your Condition statement will not be saved (this is an easy thing to forget to do).



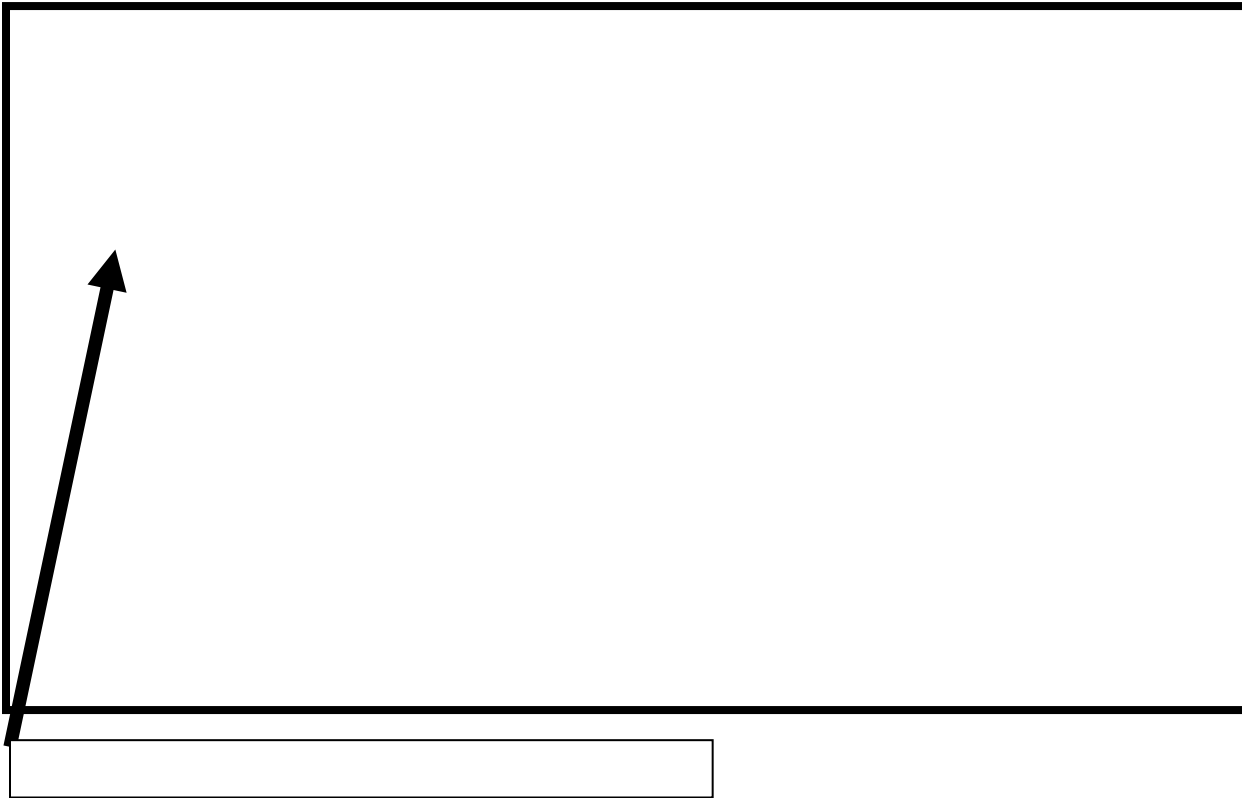
5. Add Task- Select Email



Default View



Here I am piping in the respondent first and last name into the subject line by clicking on the down arrow, then choosing Piped Text – from a survey question, Q4, and selecting the answer category First Name, then repeating it to add Last Name.



Once you have your Action set up, you can add additional tasks based on the same conditions. You can also change the name of the action from “New Action” to something more specific such as “Email notification to Sponsor”. You can also copy the action and change the conditions, etc.

