

## Qualtrics – Actions (automated emails)

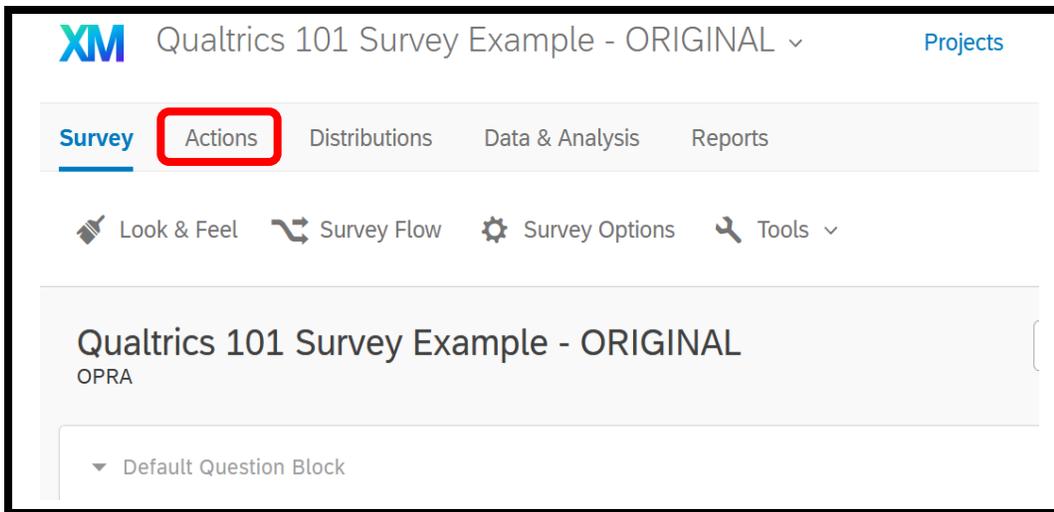
**Actions** allow you to set up emails to be sent out based on the response given in the survey. Examples of common Action Emails include:

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

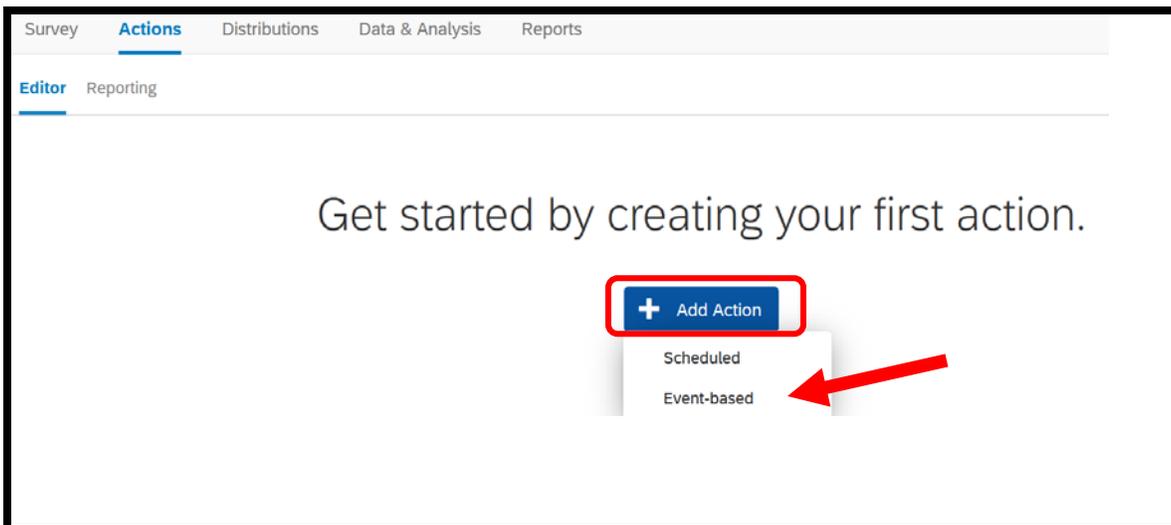
Previously, this was done using Triggers, but Qualtrics is phasing out the Trigger emails and we have had several instances where current Trigger Emails stop working, so it is important to move any current Triggers to Actions as soon as possible.

### Setting up an Action Email:

1. Navigate to the **Action tab**.



2. Click on **Add Action** and select **Event-based**



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

New Action 0 Tasks

Select what starts the action [Change](#)

**Choose Event**

Perform the following

[+ Add Task](#)

Select how you want the action to take place

 <b>Survey response</b> When a response is received or updated	 <b>Ticket Event</b> When a ticket is updated, deleted, and more	 <b>JSON Event</b> POST JSON data to a Qualtrics endpoint
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[Close](#)

 What do you want to look for?

Response created

Response updated

[← Back](#) [Cancel](#) [Finish](#)

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).

Perform the following

Any of the following are true ▾

Question ▾ Q6 Who is your academic advisor? ▾ John Doe ▾ is Selected ▾ 🗑️

+ Condition + Condition group

✓ Done Editing Cancel

+ Add Task

5. **Add Task- Select Email**

Add Task

**Tickets**  
By Qualtrics  
Create a ticket in Qualtrics

**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.

**Notifications**  
By Qualtrics  
Create a new desktop and mobile notification

**Update Ticket Task**  
By Qualtrics  
Update an existing ticket.

**Extract data from SFTP files**  
By Qualtrics  
Take data from a file in a SFTP location, and send it to Qualtrics

Cancel

## 6. Set up your email

- **To:** You can “pipe in” email address that were entered into the form as a survey question or that were captured as part of the SSO (Single Sign On embedded data) by clicking on the {a} v -- Or – you can type in one or more emails. Multiple emails must be separated by a comma (,) and **not** a semi-colon ( ;)
- **From:** You cannot change the From Address
- **From Name:** You can make the From Name anything you chose
- **Reply-To-Email:** This will default to your email as the owner of the project. You cannot change this either.
- **Subject:** You can enter anything you want here and can pipe in survey responses or embedded data as well. (Tip: Pipe in the respondent name from a question or the embedded data as part of the subject line, so it is easy to know who the email is about).
- **Options – Include Response Report:** If you select this option, the email will include the entire survey response report. Normally you do not want to do this, but it is useful if you using the Action Email as a notification to someone else who needs to act on the submission OR if you are using it for an approval.
- **When:** You can specify when you want the email to be sent, from immediately after the response is received to months out.
- **Save As:** you can save your message in your library for future use by clicking Save As. Then when you want to use it again, you can click on Load Message.
- **Save:** Click Save to finalize your Action Email setup.

# Default View

## ✉ Send Email

To:  {a} ▾

From: From Address:  @  ▾ From Name:  Reply-To Email:  @  ▾

Subject:  ▾

When:  ▾

Message:  ▾ [Save As](#)

{a}

**I**  ▾  ▾ **B** **I** U ~~X~~ ~~X~~

Options:  Include Response Report

When:  ▾

Message:  ▾ [Save As](#)

{a}

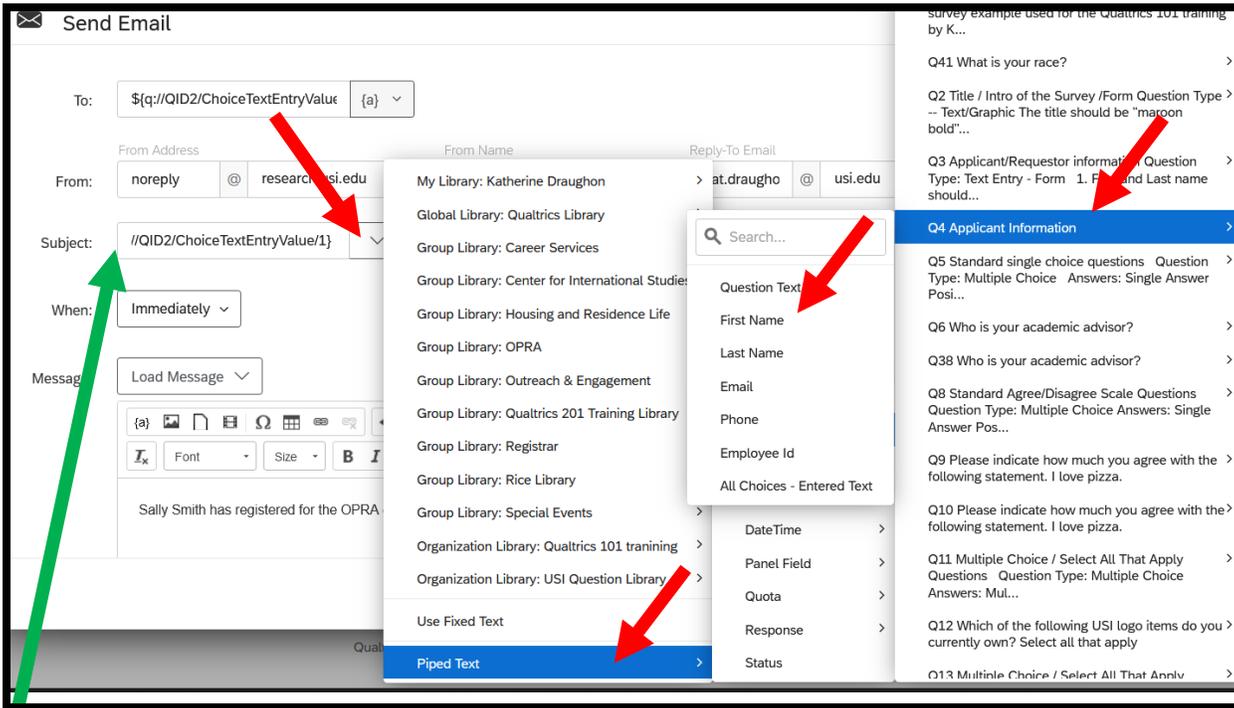
**I**  ▾  ▾ **B** **I** U ~~X~~ ~~X~~

Sally Smith has registered for the OPRA conference.

Options:  Include Response Report

Close [Save](#)

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.



End result is "piped text code" that looks like this.

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.

Click here to change name of action

Click here to copy Action

