QUALTRICS: How to send email when a survey is submitted

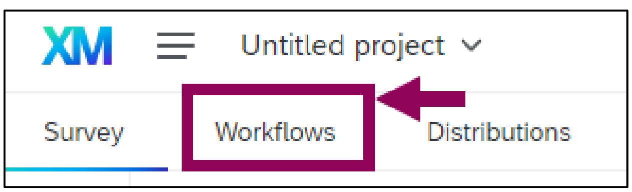
The most reliable way to auto-generate an email based on how a respondent has filled in a survey is to create a “Workflow” rule for the survey. Workflow rules or actions can be set up to carry out many types of actions but only the sending of email is described below. Qualtrics provides online tutorials for setting up both event based and time based workflows.

Workflow rules to send an email after a survey is submitted:

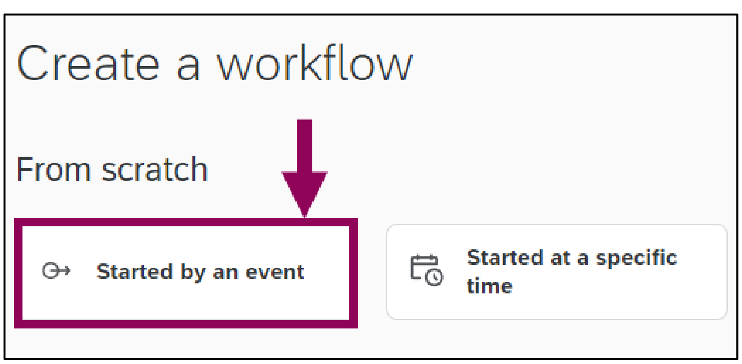
- You can pre-format an email message such that it contains some/all of the responses given by the respondent in an attractive and useful layout, OR you can have Qualtrics automatically add all questions and user responses to the email message.
- You can define one or more responses that must be received from the respondent in order for the Workflow action to be carried out.
    - Example: Only send an email if the respondent has answered a specific screening question, or selected a specific response option.
- The Workflow rule can send email to an email address supplied by the person filling in the form.
    - Example: Email a receipt to the respondent via the email they entered on the form.
- The Workflow rule can send email to a pre-defined address.
    - Example: Send email to the academic advisor of the student’s self-selected major.
- Multiple Workflow rules can be defined for a survey.
    - Example: Send email receipt to the person who filled out the form and to the survey owner.

Steps:

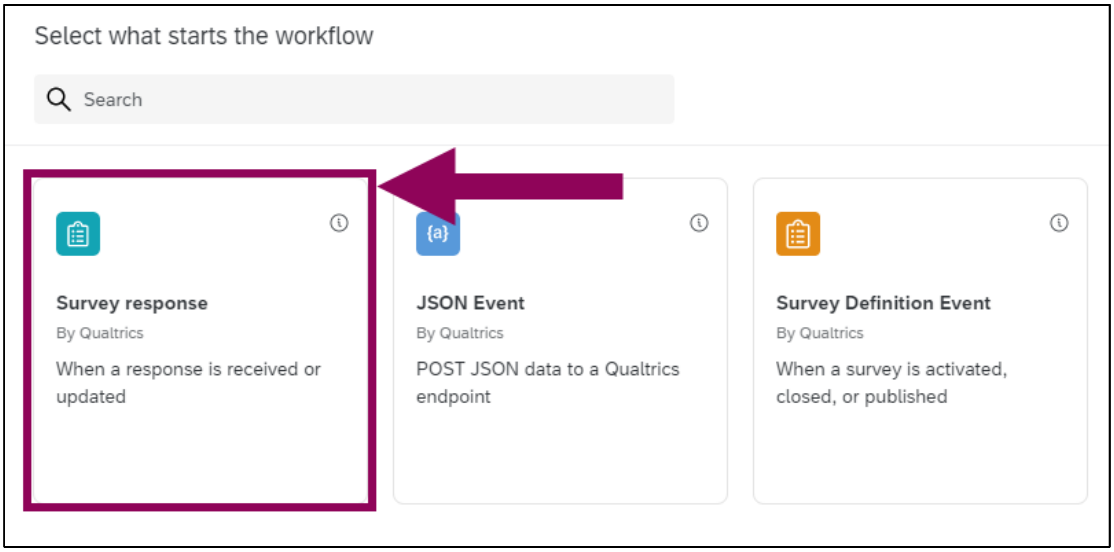
1. After coding your survey, click the “**Workflows**” link at the top of the survey.



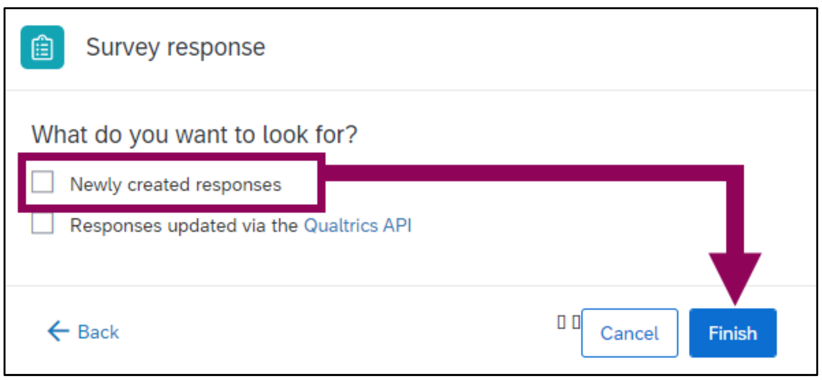
2. Click the blue “**Create a workflow**” button.
3. Select “**Started by an event**”.
4. A panel pops up explaining what the workflow is used for: click the "**Get Started**" button.



5. Select “**Survey response**”.

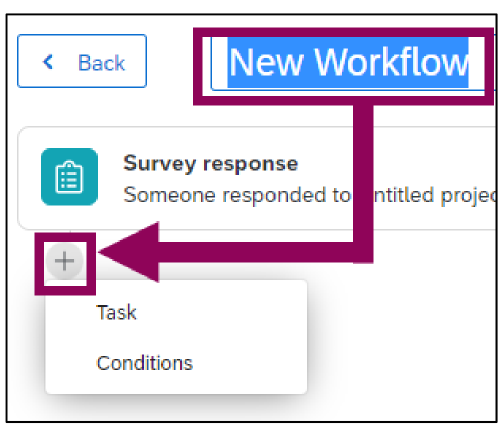


6. On the Survey Response popup window, select “**Newly created responses**”, then click “**Finish**”.



7. A new icon appears on the screen with the label “Survey response”. Click the words “**New Workflow**” and rename the rule. Example: Rename the rule “Email receipt” , “Email advisor”, etc.

8. Next, click the **plus** sign below the words “Survey Response”. You must now define both:
   - a trigger **condition** to cause the action to happen, and
   - a **task** that should be performed when the trigger condition is met.



Conditions:

1. Click the word “Conditions”
2. Use the menu and logic options to define a rule that must be met in order for the planned task to occur. The rule can be based on responses provided to one or more specific questions in the project.
3. Once you have defined a logically valid rule, the "**Done Editing**" button lights up (enabled). Click it to save the rule.

Conditions Example: Build a rule stating that the respondent must have provided their email when asked for it. This is the condition that **must** be met in order for the workflow action to be carried out.

Figure 1: Arrow points to a dulled out "✓Done Editing" button. The rule shown is not logically valid, therefore the button is not lit up (i.e. is not enabled).

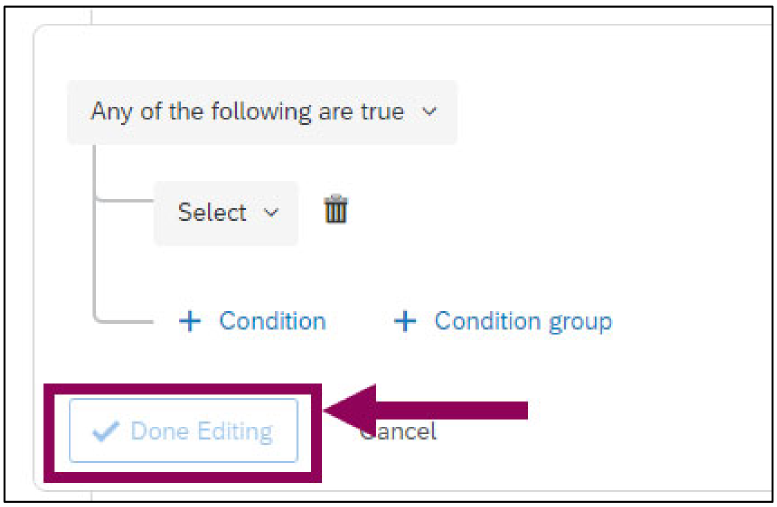
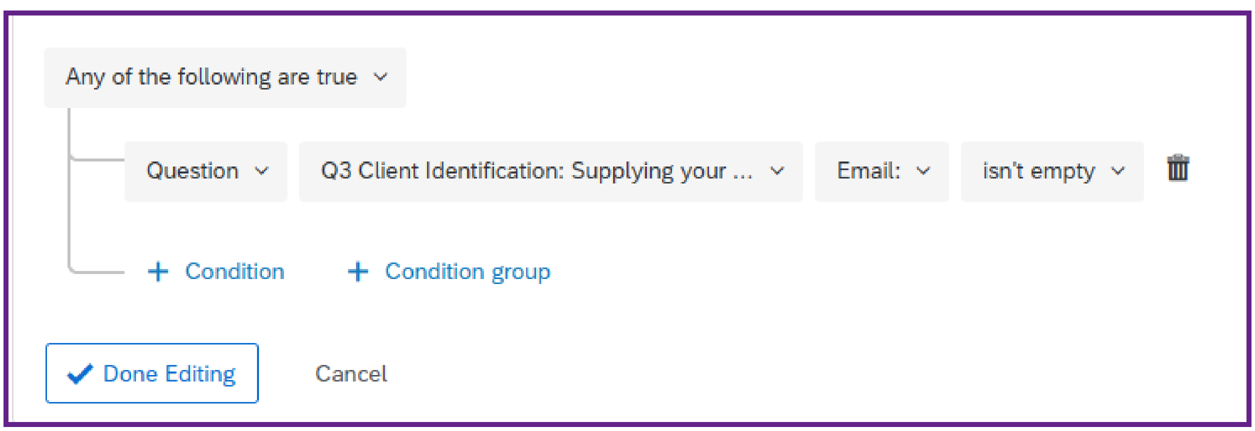


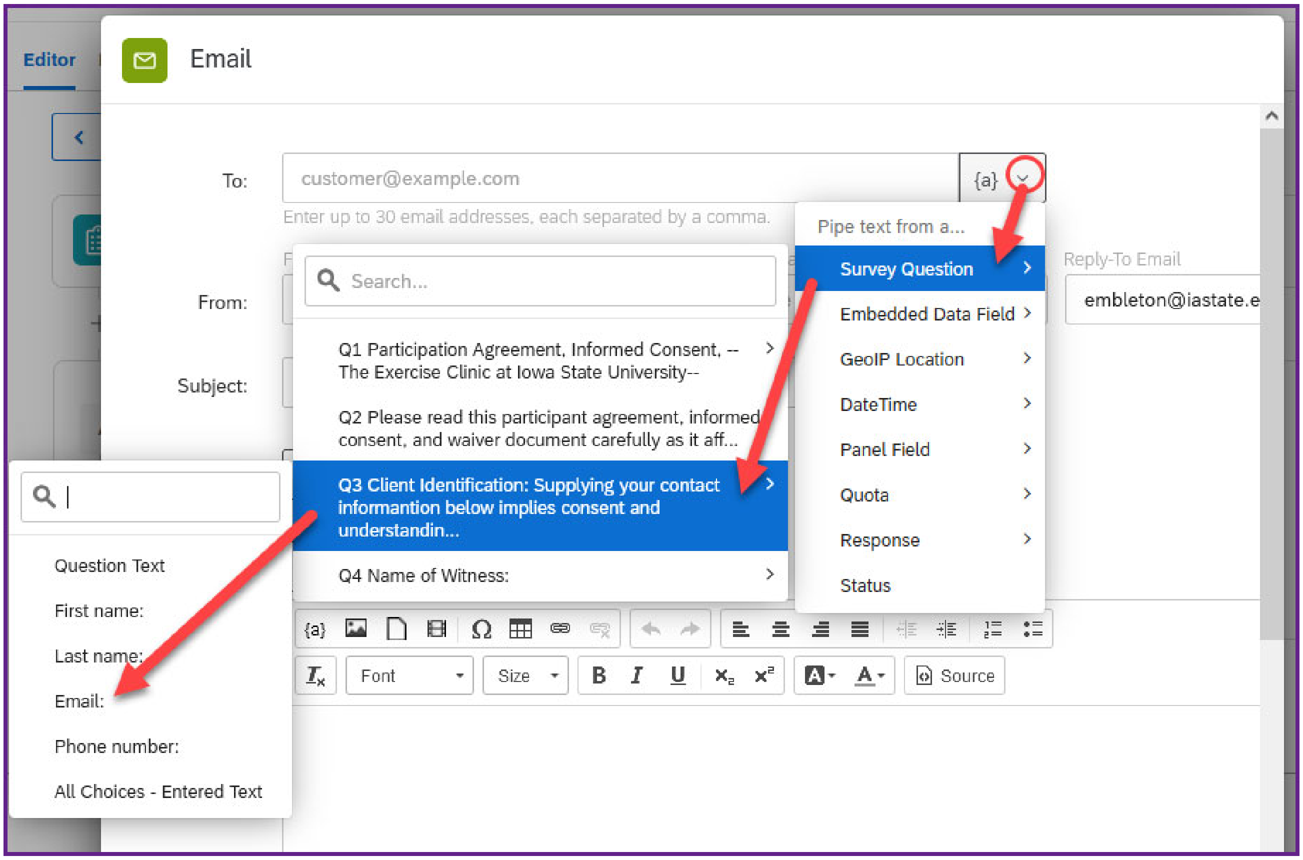
Figure 2: In this case, a logically valid rule is defined, so the "✓Done Editing" button is lit up (enabled) and the rule can be saved by clicking “Done Editing”.



Task:

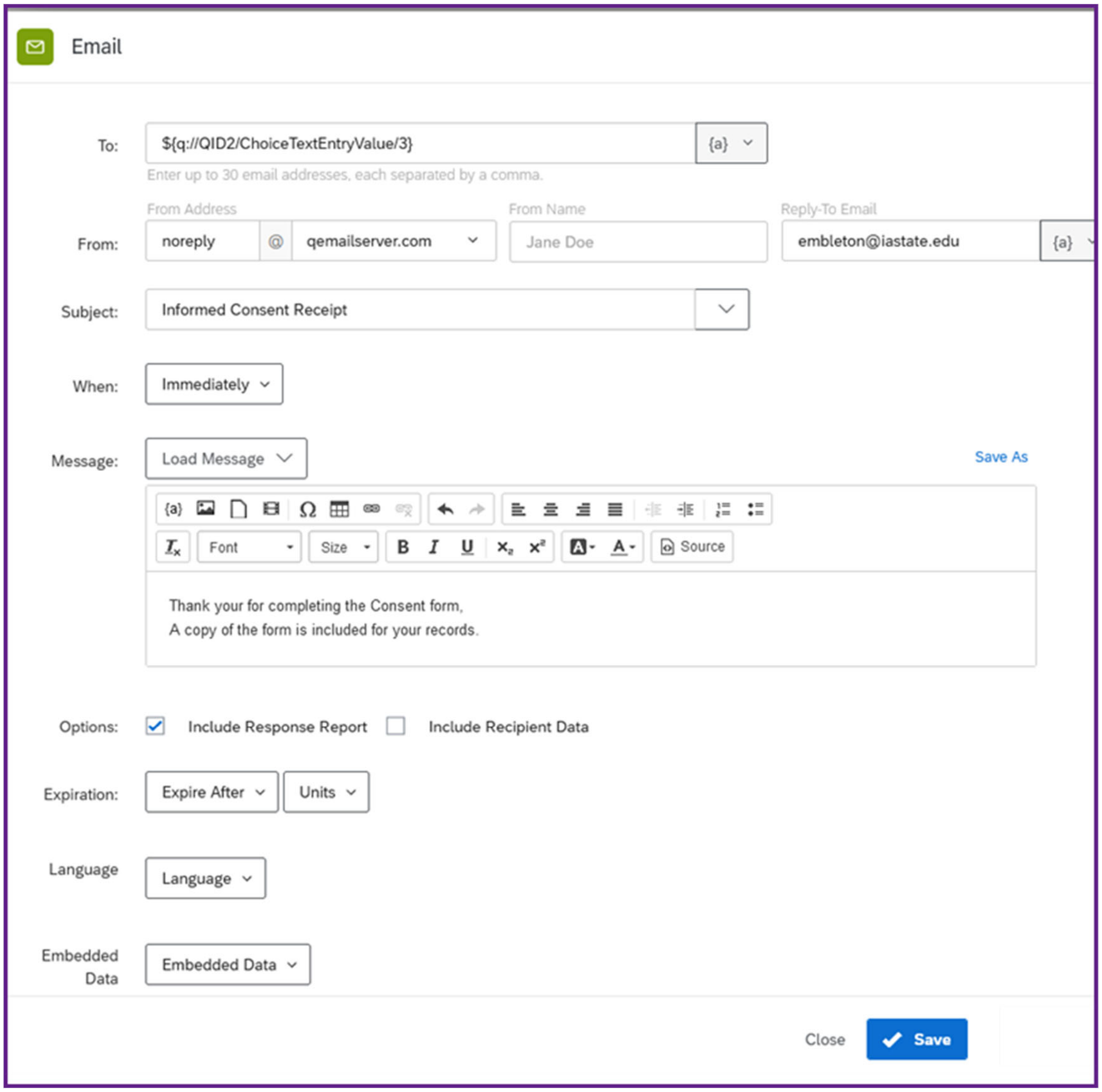
Select **Email** as the desired task, then complete the email template to define what should be included.

- Use the **{a}** tool to pipe in (bring in) any response supplied by the respondent on the project form.



- Indicate when the email should be sent (immediately or with a delay).
- Compose the message body - it can include piped in responses from each respondent.
- You have the option to include a Qualtrics generated Response Report.

Example of a simple completed email template:



Saved Workflow rules are listed and accessible from the Workflows section of your project.
You can make a copy of a Workflow rule, then edit the copy so that it is sent to a different person.