Qualtrics Sample Survey – RSVP and Lunch Order

We are going to use a Qualtrics survey I created to simulate an RSVP survey. First, you will need to save and upload the prescribed Qualtrics Survey. The ***"RSVP -Qualtrics Workshop #2"*** can be accessed through the QR located at the end of this document.

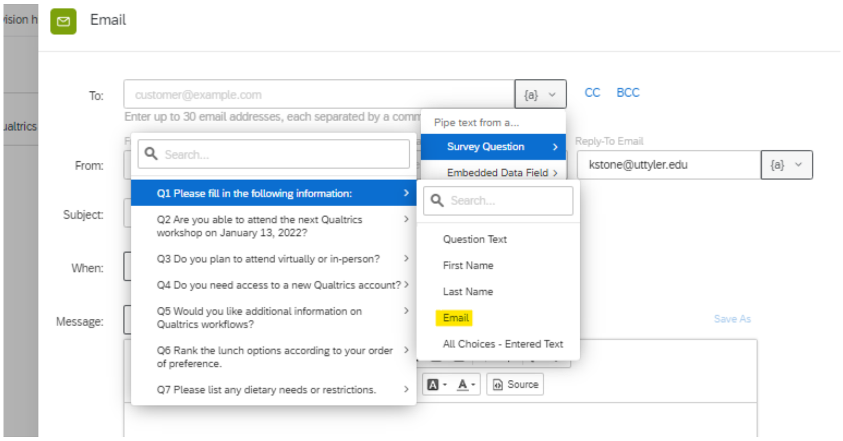
1. First download the Qualtrics survey (Titled, *"**RSVP -Qualtrics Workshop #2**"*) and save somewhere on your computer that it is easily accessible. Yes, the file is in an odd format
2. Log into your Qualtrics Account
3. Click on the blue "Create a New Project" on the bottom left-hand corner
4. Under the "From Scratch" category click on "Survey" button and hit the blue "Get started" button on the right-hand side
5. Title the project **Qualtrics Workshop RSVP and Lunch Order**
6. Under the "How do you want to start your survey" hit "Import a QSF file"
7. Click "choose file" and choose the ***RSVP -Qualtrics Workshop #2*** you saved earlier and click the blue button "Create Project"
8. You should see a survey with 6 questions across 3 blocks that ends with Q6

Adding in Workflows

Let's say you would like to send a few follow-up emails to those who took your survey and would like to send different emails based on their response. We are going to practice with two different workflows.

Sending a Zoom Link:

1. Within your survey, navigate to the "Workflows" tab on the top right.
2. Click the "Create a workflow" blue button
3. Click "Started by an event" and the "Get started" blue button on the lower right-hand corner
4. Specify the event type by clicking, "Survey response"
5. Click "Newly created responses" and then "Finish"
6. Next, click the plus icon below your newly created workflow and then click "Add a task"
7. You will see a variety of options, click "Email"
8. From here you can customize the email that will be sent when a new survey response is submitted. Please add in the following:
    a. To: piped text -> survey question -> Q3 ->Email



Email
To:
customer@example.com
{a}
CC
BCC
Enter up to 30 email addresses, each separated by a comm
Pipe text from a...
Survey Question
Embedded Data Field
From:
Subject:
When:
Message:
Search...
Q1 Please fill in the following information:
Q2 Are you able to attend the next Qualtrics workshop on January 13, 2022?
Q3 Do you plan to attend virtually or in-person?
Q4 Do you need access to a new Qualtrics account?
Q5 Would you like additional information on Qualtrics workflows?
Q6 Rank the lunch options according to your order of preference.
Q7 Please list any dietary needs or restrictions.
Search...
Question Text
First Name
Last Name
Email
All Choices - Entered Text
Save As
Source

Reply-To Email: kstone@uttyler.edu

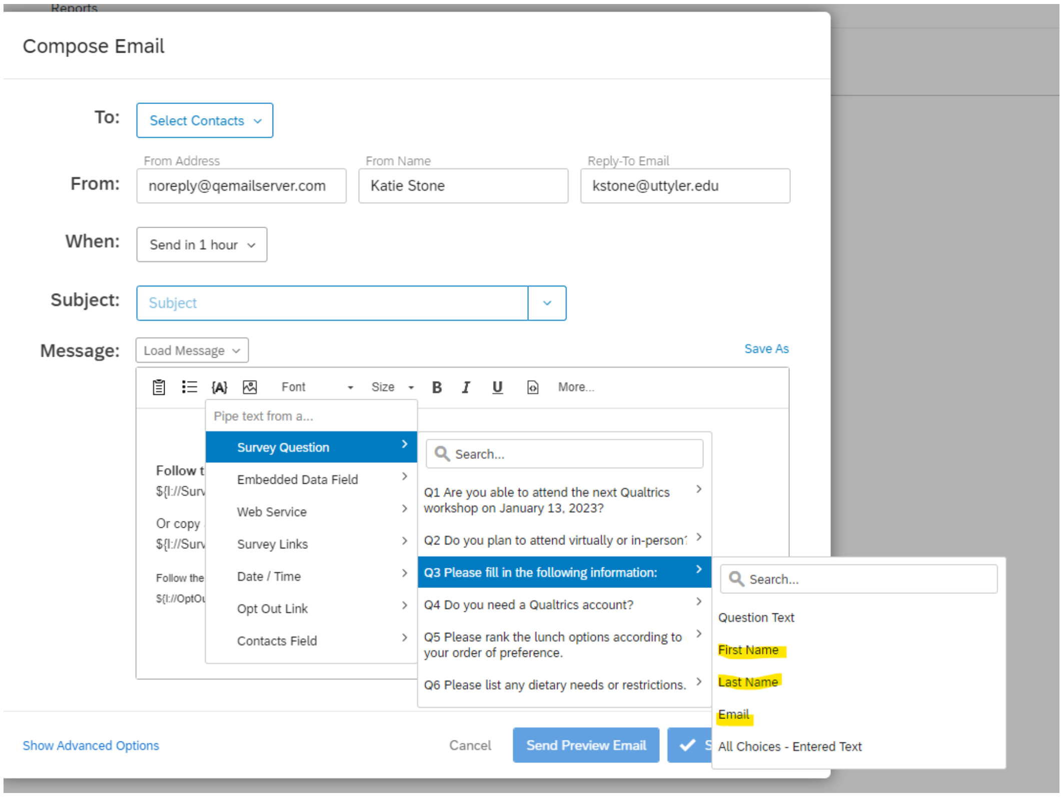
    a. From: Your email and name (could be any working email)
    b. Subject: Zoom link for Qualtrics workshop
9. Message:
    a. Hello,
       Thank you for RSVP for the Qualtrics workshop on January 13, 2023. See below for the Zoom link information (*you would typically insert Zoom info here, but we will not since this is a practice workflow*). We look forward to seeing you virtually at the workshop.
       Thanks!
       (Your name)
10. Then click "Save"

However, we also don't need to send this email to everyone who responds. We only need to send the link to those who indicated they will attend virtually. So, in this case, we need to add a condition to this workflow.

11. So above the task, click the "+" symbol and click "Add a condition"
    b. Click "question", then "Q2 Do you plan to attend virtually or in-person?", then "Virtually", then "Is selected"
    c. Then hit "save condition" and make sure the button "Turn the workflow on" in the top right hand corner is blue.
12. Exit out of workflows using the "x" in the top-right corner

Access to a Qualtrics Account:

1. Within your survey, navigate to the "Workflows" tab on the top right.
2. Click the "Create a workflow" blue button
3. Click "Started by an event" and the "Get started" blue button on the lower right-hand corner
4. Specify the event type by clicking, "Survey response"
5. Click "Newly created responses" and then "Finish"
6. Next, click the plus icon below your newly created workflow and then click "Task"
7. You will see a variety of options, click "Email"
8. From here you can customize the email that will be sent when a new survey response is submitted. Please add in the following:
    a. To: Katie Stone (or you can add your email in to test this function out)
    b. From: Your email and name (any working email)
    c. Subject: Individual needs Qualtrics access
9. Message:
    a. Hello Katie,
    b. This person (***) needs access to Qualtrics. Can you please help? Thanks! "Your name"
    c. *** You will use piped text to add in the respondents' name and email address (hint: piped text is icon with the lowercase "a" in brackets)



Compose Email

To: Select Contacts

From: From Address noreply@qemailserver.com | From Name Katie Stone | Reply-To Email kstone@uttyler.edu

When: Send in 1 hour

Subject: Subject

Message: Load Message

Reports
Save As
Font
Size
B
I
U
More...
Follow t
${l://Surv
Or copy
${l://Surv
Follow the
${l://OptOu
Pipe text from a...
Survey Question
Embedded Data Field
Web Service
Survey Links
Date / Time
Opt Out Link
Contacts Field
Search...
Q1 Are you able to attend the next Qualtrics workshop on January 13, 2023?
Q2 Do you plan to attend virtually or in-person?
Q3 Please fill in the following information:
Q4 Do you need a Qualtrics account?
Q5 Please rank the lunch options according to your order of preference.
Q6 Please list any dietary needs or restrictions.
Search...
Question Text
First Name
Last Name
Email
All Choices - Entered Text
Show Advanced Options
Cancel
Send Preview Email

10. Then click “Save”

However, we only need to send this email when someone responds that they need access to Qualtrics.. Therefore, we need to add a condition to this workflow.

13. So above the task, click the “+” symbol and click “Add a condition”
    d. Click “question”, then “Q4 Do you need a Qualtrics account?”, then “yes”, then “Is selected”
    e. Then hit “save condition” and make sure the button “Turn the workflow on” in the top right hand corner is blue.
14. Exit out of workflows using the “x” in the top-right corner

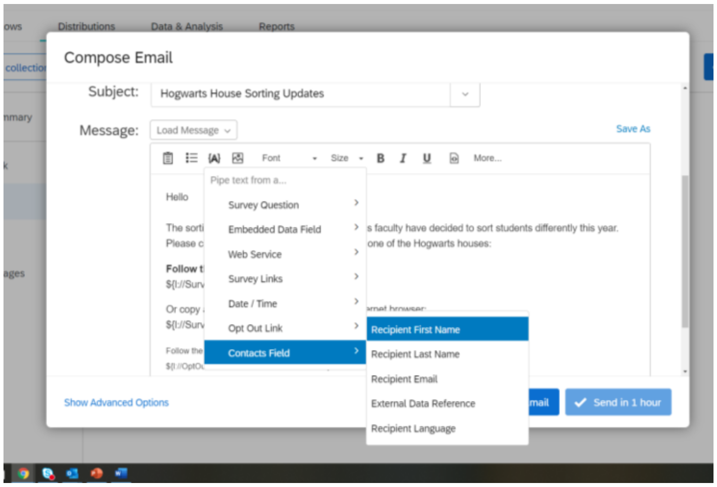
Check your Work

- Preview the survey to check for display logic and overall flow.
- Check for typos and spelling mistakes.
- Review your workflow tab to ensure your workflows have been saved.
- Test your survey to ensure workflows work.

Distributing A Survey

You have been appointed the project manager for this Qualtrics survey project, to create and distribute the survey. In this role, you need to distribute the survey to collect data. (Note. Your survey must be published before you can distribute your survey. Clicking the blue “publish” button on the top left activates your survey).

1. On the top left, hit the button with three lines and then click on “Directories”
2. Click on “Lists” on the left-side column
3. Click on the blue “Create a List” button
4. Name it “***RSVP -Qualtrics Workshop #2***” and click “Confirm”
5. Click “Manual Input” and add in your own email address, first name, and last name (remember, punctuation matters here) and click the blue “Next” button
6. Navigate back to your ***RSVP -Qualtrics Workshop #2*** and go to the Distributions tab
7. Click on Compose Email
8. Fill/Adjust the following information:
    a. To: (select your “***RSVP -Qualtrics Workshop #2***” from your library)
    b. From:
    c. From Name:
    d. Reply to Email
    e. When:
    f. Subject:
9. Within the message body, please include the following information:
10. Piped Text First Name

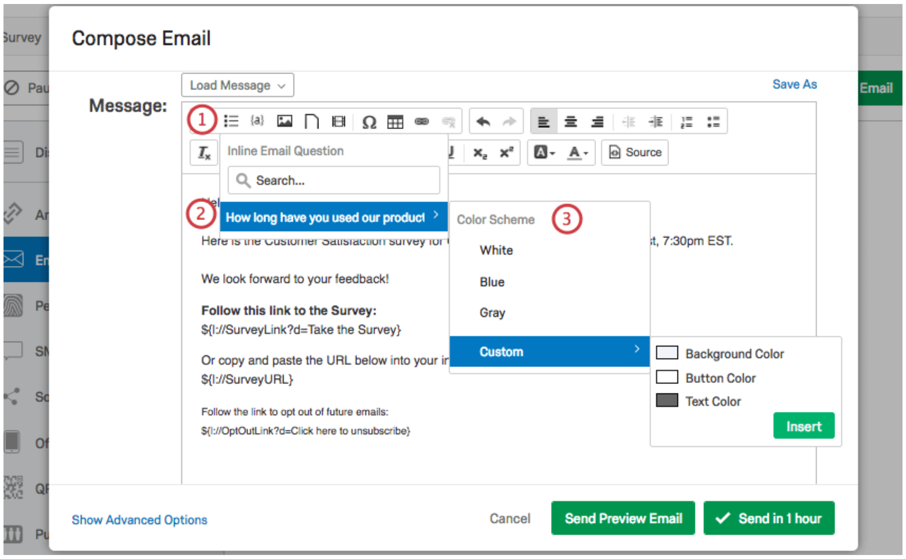


Compose Email

Subject: Hogwarts House Sorting Updates

ows
Distributions
Data & Analysis
Reports
collectio
nmary
k
ages
Message:
Load Message
Save As
Font
Size
B
I
U
More...
Pipe text from a...
Survey Question
Embedded Data Field
Web Service
Survey Links
Date / Time
Opt Out Link
Contacts Field
Recipient First Name
Recipient Last Name
Recipient Email
External Data Reference
Recipient Language
Hello
The sorti
s faculty have decided to sort students differently this year.
Please c
one of the Hogwarts houses:
Follow t
${l://Surv
Or copy
${l://Surv
Follow the
${l://OptOu
Show Advanced Options
mail
Send in 1 hour

11. Message about the purpose of the survey
12. We are going to create an in-line question to boost survey responses:
    a. I suggest we use the question “Are you able to attend the next Qualtrics workshop…?”
    b. Including a survey question in your email message can enhance your survey invitation. When your participants receive the email, they’ll be able to click an answer to your inline question right from the body of the email. Clicking on an answer will immediately launch the survey in another tab, with their chosen answer already selected for them.


Compose Email
Message:
Load Message
Save As
Email
Source
Inline Email Question
Search...
How long have you used our product
Color Scheme
White
Blue
Gray
Custom
Background Color
Button Color
Text Color
Insert
Show Advanced Options
Cancel
Send Preview Email
Send in 1 hour
1
2
3

Here is the Customer Satisfaction survey for … t, 7:30pm EST.

We look forward to your feedback!

Follow this link to the Survey:
${l://SurveyLink?d=Take the Survey}

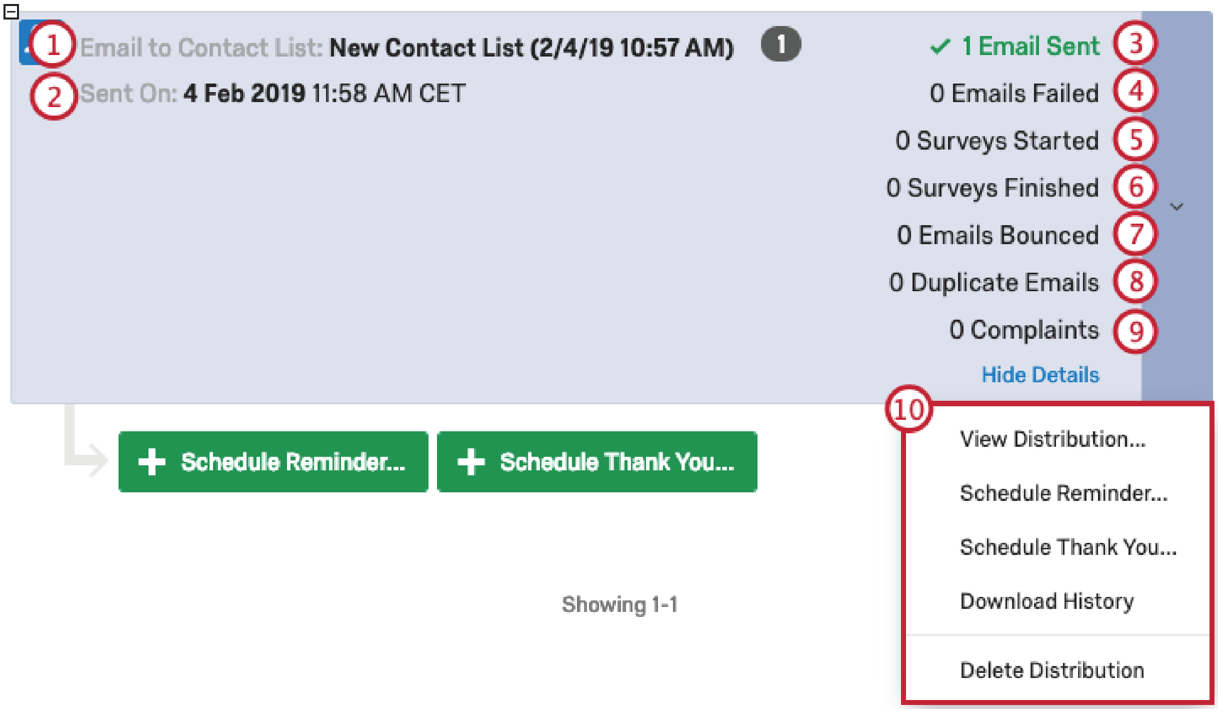
Or copy and paste the URL below into your i…
${l://SurveyURL}

Follow the link to opt out of future emails:
${l://OptOutLink?d=Click here to unsubscribe}

13. Once you are satisfied with the email message and subject, you can click “send.”

Track Responses (taken from Qualtrics Support)

Each time an email distribution is scheduled to be sent, it is recorded as a separate distribution block in the Emails section. Within each distribution block, you’ll find relevant information about the status of the distributed emails and surveys.


Email to Contact List: **New Contact List (2/4/19 10:57 AM)** 1
Sent On: **4 Feb 2019** 11:58 AM CET

✓ 1 Email Sent
0 Emails Failed
0 Surveys Started
0 Surveys Finished
0 Emails Bounced
0 Duplicate Emails
0 Complaints

1
2
3
4
5
6
7
8
9
10
Hide Details
Schedule Reminder...
Schedule Thank You...
Showing 1-1
View Distribution...
Schedule Reminder...
Schedule Thank You...
Download History
Delete Distribution

1. **Email to Contact List**: The individual or contact list your distribution was sent to and the total number of contacts in the distribution.
    a. Qtip: In this example, the contact list has the date it was created in the name. This is unrelated to the date the distribution was sent / scheduled for.
2. **Sent On / Scheduled For:** The date and time the distribution was sent. If the distribution has not yet been sent, the scheduled time will be listed in blue. The timezone will match the one set for your account.
3. **Emails Sent:** The current number of emails delivered out of the total distribution.
    a. Attention: Occasionally, the distribution will show a larger number of Emails Sent than what shows up in the downloaded email history. This will happen when members of the contact list that were originally recipients have been deleted. Deleted contacts will not appear in the download, but deleting contacts has no effect on the Emails Sent statistic.
4. **Emails Failed:** The number of emails that did not leave our servers. The most common cause of a failed email is an incorrectly formatted email address, such as a missing @. This number does not include bouncebacks.
5. **Surveys Started:** The number of surveys where the recipient has at least clicked on the link. This includes the number of people who have submitted the survey.
6. **Surveys Finished**: The number of surveys sent out in the distribution that have been submitted.
7. **Emails Bounced**: The number of emails that were rejected by the recipient server.
    a. Qtip: There are two types of bounces: hard bounces and soft bounces. Hard bounces are emails that can’t be delivered due to a permanent reason. This could include the email address not existing, the recipient server not accepting emails, or the domain not being a real email domain. Soft bounces are emails that can’t be delivered due to temporary reasons. The recipient email inbox could be full, the email could be too large, or the recipient email server could be temporarily down. Qualtrics automatically retries sending soft bounces after a period of time.
8. **Duplicate Emails**: The number of duplicate emails prevented from sending. Duplicate emails are emails with the exact same message and recipient as another email that went out. For example, if your contact list has the same email address on it multiple times, this will be seen as a duplicate, and to prevent your entire distribution from being flagged as spam, the Qualtrics mailer will not send these out. See the Editing Contacts in a List page for help consolidating duplicates in your contact list.
9. **Complaints**: The number of notifications Qualtrics servers receive from the email provider when a recipient clicks ‘Report Spam’ (or equivalent) for a Qualtrics originated email. See the Avoid Being Marked as Spam page for more details.

Reminder and Thank you Emails (taken from Qualtrics Support)

After you’ve invited respondents to take your survey, Qualtrics allows you to send special emails reminding these respondents to finish, or thanking them for finishing. The system will recognize who’s finished for you, so you don’t have to worry about setting up a special contact list! **Note: Reminder and thank you emails can only be sent to distributions using the individual link! (Individual links are generally the default for emailed surveys.)*

TO SEND A REMINDER EMAIL

1. Expand the appropriate distribution block by clicking on the plus sign in the top left corner.
2. Click Schedule Reminder underneath the distribution block.
3. Schedule the time of your distribution in the When dropdown (by default, your mailing will be sent one hour from when you schedule the mailing, but you can choose from a range of common times or schedule a custom time).
4. Include a message in the body.
5. Click send.

TO SEND A THANK YOU EMAIL

1. Expand the appropriate distribution block by clicking on the plus sign in the top left corner.
2. Click Schedule Thank You Message.
3. Schedule the time of your distribution in the When dropdown (by default, your mailing will be sent one hour from when you schedule the mailing, but you can choose from a range of common times or schedule a custom time).
4. Enter a subject for the email.
5. Create an email message.
6. Click Send.

Additional Tools/Features when Distributing a Survey

Anonymous Link

Social Media

Personal Links

QR Code

Set a password for your survey

1. Navigate to the “Survey Options” tab on the left-hand navigation bar
2. Under “Security” turn on password protection

Ensure respondents cannot take the survey more than once via the anonymous link

1. Under the “Security” tab, turn on “Prevent multiple submissions”

Allow respondents to leave your survey and then re-enter where they left off when they click on the survey link again.

1. Under the “Responses” tab, turn on “Allow respondents to finish later”

To access the files used in today’s workshop: