

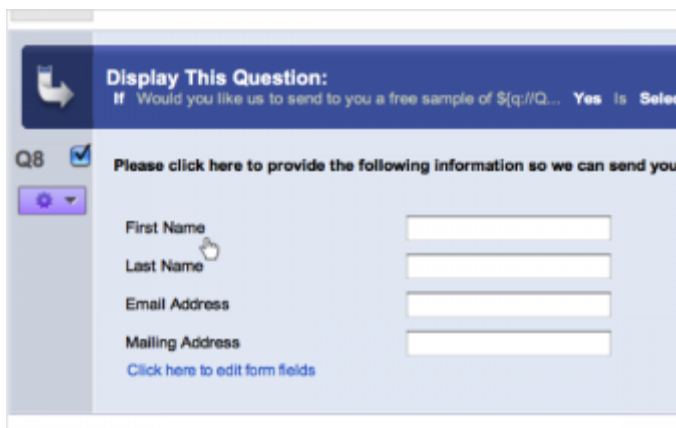
Qualtrics – Panel Triggers Advanced

<https://siue.qualtrics.com>

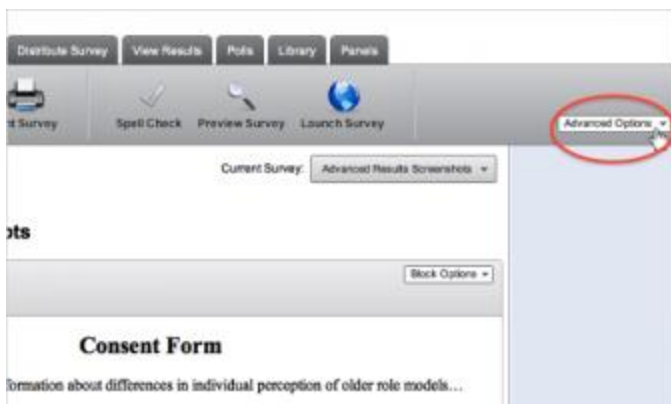
With Panel Triggers, Qualtrics can use answers given in your survey and automatically add or update individuals to a Qualtrics panel based off of the logic you specify. This is especially useful in scenarios where you want to allow participants to opt-in to a panel you've created.

To create a Panel Trigger:

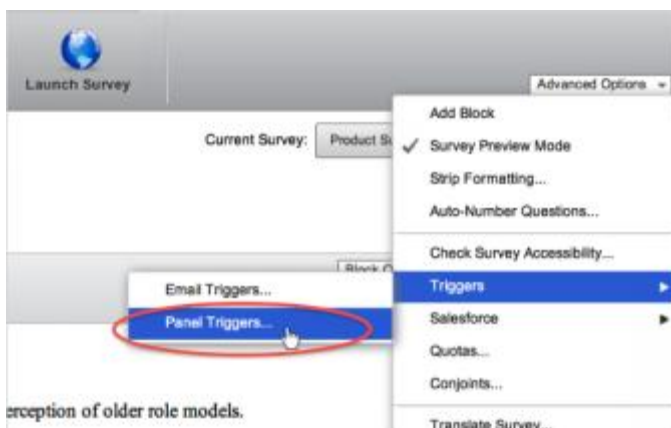
1. Include a question in your survey that asks for the participant's name, email address, and any other information you would like included in the panel.



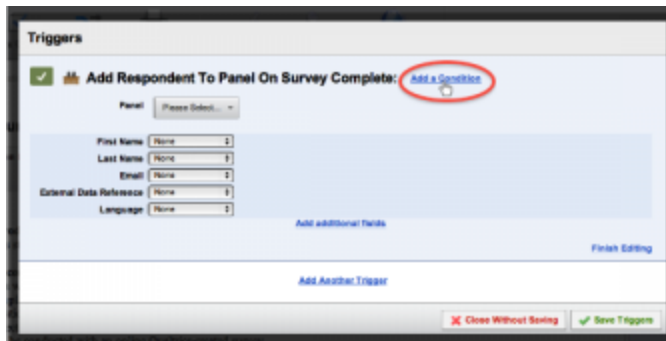
2. On the gray navigation bar, select the **Advanced Options** drop-down.



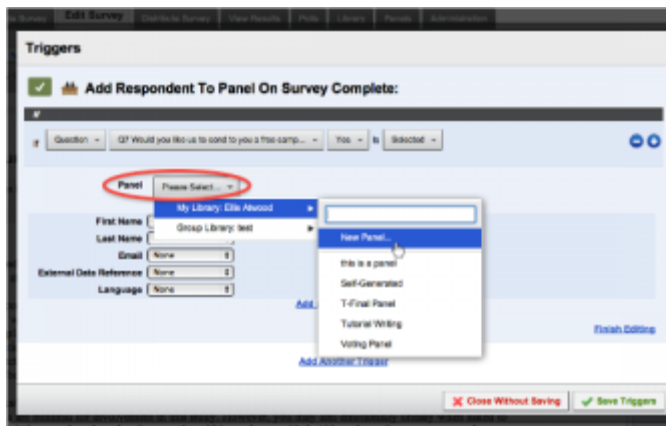
3. Select **Triggers**, and choose **Panel Triggers**.



- By default, all participants will be added to the panel. If desired, **Add a Condition** that must be met for the participant to be added to the panel.



- Select the Panel to which you would like to add the respondents by clicking **Please Select**, choosing **My Library** or a **Group Library**, and choosing which panel to use.



- Choose the field from the survey that will be saved as the participant's **First Name**.
- Choose the field from the survey that will be saved as the participant's **Last Name**.
- Choose the field from the survey that will be saved as the participant's **Email Address**.



9. If desired, choose fields to be saved as the participant's **External Data Reference** and **Language**.
10. If needed, select to **Add additional fields** and specify the Embedded Data field you would like created and the question that will populate the value of the Embedded Data field.

The screenshot shows the 'Triggers' configuration interface. At the top, it says 'Add Respondent To Panel On Survey Complete:'. Below this, there's a 'Panel' dropdown set to 'Please Select...'. A table lists fields: 'First Name' (linked to 'Q1 Please click here'), 'Last Name' (linked to 'Q1 Please click here'), 'Email' (linked to 'Q1 Please click here'), 'External Data Reference' (set to 'None'), and 'Language' (set to 'None'). A red circle highlights the 'Add additional fields' link below the table. At the bottom right, there's a 'Finish Editing' link. At the very bottom, there are two buttons: 'Close Without Saving' and 'Save Triggers'.

11. Click **Finish Editing**, and **Save Triggers**.

This screenshot shows a closer view of the configuration options. It includes links for 'Add additional fields', 'Finish Editing', and 'Add Another Trigger'. At the bottom, the 'Close Without Saving' and 'Save Triggers' buttons are visible, with the 'Save Triggers' button circled in red.