Use the Salesforce integration tool to connect Qualtrics with your Salesforce account. Through Salesforce integration you can easily record and update leads, map responses, and set up email triggers.

Getting Started with Salesforce Integration

Link your Qualtrics Survey with your Salesforce account:

1. Go to the **Edit Survey** tab in Qualtrics.
2. Click on the **Advanced Options** drop-down menu on the right-hand side of the page.
3. Select the **Salesforce** option, then click **Setup Link to Salesforce Account**.
4. Type in your Salesforce **User Name**, **Password**, and **security token**.

To get your security token:

1. Log in to Salesforce.com.
2. Within Salesforce, click on Setup, then My Personal Information, then Reset My Security Token.
3. Click the Reset Security Token button and wait for the email to arrive at your Salesforce email address.
4. Copy and paste the security token into the Set Up window in Qualtrics.

Qualtrics on the App Exchange:

App exchange enables you to access your Qualtrics account and all of its functionalities within the Salesforce dashboard. It's a free app for all Qualtrics users. For more information on Qualtrics for Salesforce app exchange, click here.

Web to Lead

The Salesforce Web to Lead feature allows you to automatically insert information from your Qualtrics survey into the Lead object of your Salesforce account. Conditions can be set using advanced logic to identify specifically which respondents will be saved into Salesforce and which ones will not. These conditions can be based off of question responses, embedded data fields, or survey quotas. To Use the Salesforce Web to Lead feature,

1. Go to the **Edit Survey** tab in Qualtrics.
2. Click on the **Advanced Options** drop-down menu on the right-hand side of the page.
3. Select the **Salesforce** option, then click **Web to Lead**.
4. You'll need to identify the Salesforce.com organization ID so Qualtrics knows where the lead information should be stored. (The steps to find this information can be found by clicking on the small blue question mark to the right).
    1. Log in to Salesforce.com
    2. Within Salesforce, click on Setup>Administrative Setup>Company Profile>Company Information.
    3. Look under **Organization Detail**. In the second column towards the bottom, you will find a 15 character alphanumeric value for the Salesforce.com Organization ID.
    4. Copy and paste this value into the trigger.
5. At the top of the window, you'll notice that you can create a condition for when you'd like the lead to be triggered. Leave it blank if you'd like it to be triggered every time the survey is completed. Conditions can be based off of questions, embedded data fields, or quotas. You can use the blue plus and minus signs to the right to add or remove additional "and if" or "or if" conditions to your logic.
6. You can use the drop-down arrows to identify the fields in Salesforce that you'd like to populate and the location in the survey from where you'll be pulling in that information. You can continue to add fields into your Salesforce account by using the blue plus and minus signs to the right. Note that this feature limits you to the standard 'Lead' fields identified by Salesforce. For pulling in additional objects and fields, see the section on Response Mapping.
7. If you need to, you can create additional Salesforce triggers for adding different information into different accounts by using the **Add another lead trigger** option at the bottom of the window.
8. Make sure to save your Salesforce Web to Lead Trigger when you are finished.

Click **Preview Survey** to test the setup of your Salesforce Web to Lead feature in Qualtrics. When you are finished with the survey, the preview will indicate whether or not the lead was successfully saved into your Salesforce account. Also check your Salesforce account for verification that the lead has been saved as desired, but note that the lead may not appear for a few minutes as it needs to pass through the Salesforce Web to Lead system before it can appear.

Response Mapping

The **Response Mapping** feature allows you to automatically insert information from your Qualtrics survey into any object or field of your Salesforce account. Additionally, you'll find the option to update or remove any already existing Salesforce object. Conditions can be set using advanced logic to identify specifically which respondents will be saved, updated or removed. These conditions can be based off of question responses, embedded data fields, or survey quotas.

To begin using the Salesforce Response Mapping feature:

1. Go to the **Edit Survey** tab in Qualtrics and click on the **Advanced Options** drop-down menu on the right-hand side of the page.
2. Select the Salesforce option, then select **Response Mapping**.
3. At the top of the window, you can create a condition for when the lead will be triggered. Leave it blank to have the lead triggered every time the survey is completed. Conditions can be based off of questions, embedded data fields, or quotas. You can use the blue plus and minus signs to the right to add or remove additional "and if" or "or if" conditions to your logic.
4. Identify the action that you would like Qualtrics to take when the condition is met. These include Updating, Inserting, or Deleting objects in your Salesforce account.

To Update or Delete an Object:

1. Select the action to **Update** or **Delete** your object.
2. Identify the Salesforce Object in the drop-down menu.
3. Use the drop-down arrows below to identify the fields in Salesforce to populate and the location in the survey from which the information will be pulled. Continue to add fields into your Salesforce account by using the blue plus and minus signs to the right.
4. The Update option also contains a Key button to the far left side of each field you're looking to update. When updating or deleting a Salesforce object, a unique field is needed to make sure that the correct object is changed. The field that is selected as the 'Key' will be used as the unique identifier to locate the object. If the key is not unique and more than one object is returned the action to update or delete will fail, and no action will occur.

To Insert an Object:

1. Select the action to **Insert** your object.
2. Identify the Salesforce Object in the drop-down menu.
3. Use the the drop-down arrows below to identify the fields in Salesforce that you'd like to populate and the location in the survey from where you'll be pulling in that information. You can continue to add fields into your Salesforce account by using the blue plus and minus signs to the right.

Additional Instructions

If you need to, you can create additional Salesforce triggers for adding different information based on alternate conditions by using the **Add new Salesforce Object Mapping** option at the bottom of the window. Make sure to save your Salesforce Web to Lead Trigger when you are finished.

If you'd like to test the setup of your Salesforce Response Mapping in Qualtrics, use the Preview Survey option in the Edit Survey tab. When you are finished with the survey, it will indicate whether or not the lead was successfully saved into your Salesforce account. Be sure to also check your Salesforce account for verification that the object has been saved.

Trigger and Email Survey Option

The Trigger and Email Survey option allows you to set up an email trigger containing a survey that will go out when a specified object's Workflow rule has been met in Salesforce.

To create a Workflow Rule and Outbound Message in Salesforce:

1. Log into Salesforce.com.
2. Within Salesforce, click on Your Name, then **Setup**.
3. In the left-hand menu, click **Create**, then **Workflow and Approvals**, then Workflow Rule.
4. Click the **New Rule** button.
5. Select the object that you will use for your rule.
6. Click the **Next** button.
7. Enter a name and description for your rule.
8. Set your condition for the rule.
9. Click the **Save and Next** button.
10. Set an action for your rule by selecting **New Outbound Message**.
11. Edit the **Name**, **Description**, and **From name** for the outbound message.
12. Copy the end URL found in the Qualtrics Trigger and Email Survey window and paste it into the outbound URL location in Salesforce.

To use the Salesforce Trigger and Email Survey:

1. Go to the **Edit Survey** tab in Qualtrics.
2. Click on the Advanced Options drop-down menu on the right-hand side of the page.
3. Select the **Salesforce** option, then **Trigger and Email Survey**.
4. When the window appears, you will need to click on the blue text that reads, **Add an Outbound Message**.
5. Once created, you'll see an option to select a Salesforce Object and Email Field.
6. The Object's rule is what triggers the outbound message.
7. The **Email Field** is the email address the message will be sent to.
8. The **Store** email in Panel Option allows you to store that person's information into a panel for future use or for using Embedded Data. This is optional, but it is required if you want to use embedded data to pass information from Salesforce into your survey or results.
9. Once a panel is selected, you can click on the blue text which reads, 'Show available embedded data.' The listed fields are the fields you can pass into your survey and use as piped text and save into your results.
10. Enter the **From Name**, **Reply-to Email Address**, and **Subject** for the message to be sent.
11. Click on the drop-down menu that says, 'Load a saved message' and either select a message from your library or create a new one by selecting 'New Message' under your library.
12. Copy and paste the **Outbound Message URL** into the endpoint URL for your outbound message in Salesforce that is associated with the workflow rule you for the object you selected above.

Pass Embedded Data from Salesforce to Qualtrics

This option allows you to save the information you're pulling from Salesforce into the results in Qualtrics or to pipe that information into an email or survey question.

To save the information in your results:

1. In the **Edit Survey** tab of Qualtrics, click on the **Advanced Options** drop-down menu on the right-hand side of the page.
2. Select the **Salesforce** option, then **Trigger and Email Survey**.
3. When the window appears, click on **Show available embedded data**.
4. Copy the field IDs from the left column that match the corresponding Salesforce fields you'd like to view in your results.
5. Paste the Field IDs as embedded data into your Survey Flow:
    1. Go to the **Edit Survey** tab and click on the **Survey Flow** icon in the gray toolbar along the top.
    2. Click on **Add a new element here**.
    3. Select the **Embedded Data** element.
    4. Paste the Field IDs from the previous list into the Embedded Data field.

The information will then be pulled automatically into your results from the Salesforce account.

To pipe the Salesforce information into your survey or email message:

1. In the **Edit Survey** tab, click on the **Advanced Options** drop-down menu on the right-hand side of the page.
2. Select the **Salesforce** option, then click **Trigger and Email Survey**.
3. When the window appears, click **Show available embedded data**.
4. Copy the field IDs from the left column that match the corresponding Salesforce fields you'd like to pipe into your message or survey.
5. Use the Pipe Smart Text icon "{a}" to inert the text into the desired location.
6. Paste the field IDs into the embedded data option for the piped text.