How-to Guide for Integrating Salesforce with Qualtrics

Introduction: This guide explains how to integrate Salesforce with Qualtrics to automate the collection and synchronization of survey data. By integrating the two platforms, you can create, send, and analyze surveys directly in Qualtrics while automatically updating Salesforce records based on survey responses.

Prerequisites:

- Access to Salesforce with API capabilities enabled.
- Qualtrics account with API access.
- Basic knowledge of Salesforce and Qualtrics data structures.

Step 1: Set Up Salesforce Object and Fields for Survey Data

Before connecting Salesforce with Qualtrics, you need to define where the survey data will be stored in Salesforce.

1. Create a custom object in Salesforce:

- Navigate to **Setup → Object Manager**.
- Click on **Create → Custom Object**.
- Define the object, such as Survey_Response, and create custom fields like Survey_ID, Response_Date, and Customer_Satisfaction_Score.

2. Set up relationships:

- Define relationships between Survey_Response and existing Salesforce objects like Contact or Account to link responses with customer records.

Step 2: Enable Salesforce Integration in Qualtrics

1. **Go to Qualtrics** and log into your account.
2. In the navigation bar, click on **Directories → Contacts → Salesforce Integrations**.
3. Select **Add Integration**, and choose the Salesforce environment you wish to integrate (Production or Sandbox).
4. **Authenticate** using your Salesforce credentials:

- Enter your Salesforce username, password, and security token.
- Qualtrics will now have access to your Salesforce environment.

Step 3: Create and Configure a Survey in Qualtrics

1. **Create a survey** in Qualtrics or choose an existing survey that you want to send to customers.
2. Once the survey is created, go to **Survey Flow** and add an **Embedded Data** block to capture any relevant Salesforce fields. For example:

- Contact_ID
- Account_ID

3. **Embed the data into your survey** to associate survey responses with Salesforce records.

Step 4: Set Up Workflow Automation in Qualtrics

1. Go to **Actions** in Qualtrics and select **Add a New Action**.
2. Choose **Salesforce** as the action type.
3. In the action settings, configure how survey responses should update or create Salesforce records:

   - Select **Create a Record** or **Update a Record** based on the survey response.
   - Map survey fields (e.g., Customer_Satisfaction_Score, Comments) to Salesforce fields in the Survey_Response object.

Step 5: Test and Verify the Integration

1. **Send a test survey** to a small group of users.
2. After responses are received, check Salesforce to ensure that new survey records are being created or updated in the Survey_Response object.
3. Verify that the data (such as satisfaction score, comments, and response date) is correctly mapped to the corresponding fields in Salesforce.

Step 6: Automate Data Flow with Workflows and Triggers in Salesforce

1. In Salesforce, create a **Workflow Rule** to trigger actions based on new survey responses.

   - Navigate to **Setup → Workflow Rules → Create New Rule**.
   - Set the rule to trigger when a new Survey_Response record is created.

2. **Create a workflow action** that sends an email alert or updates a related record (e.g., Contact or Account) based on the response data.

For example, you can set a rule to notify a customer service team when a survey response has a low satisfaction score.

Conclusion: By integrating Salesforce with Qualtrics, you can streamline your customer feedback process. Survey responses are automatically captured and linked to Salesforce records, allowing you to analyze customer satisfaction and take action based on real-time data. This integration ensures that your team can respond quickly to feedback, improving customer satisfaction and service quality.