

Distribute Tab Messages based on criteria

Workforce | EX



| Why?

Problem statement

In EX surveys the challenge for the user is that all the messaging can be scheduled or sent to ALL or SELECTED participants, but not to the participants based on the rules that match the criteria as per the demographics mentioned below.

User Persona



Jane Doe - HR Manager

User Story

Jane has created an EX survey. She needs to send the emails to newly added employees in a particular region and send reminders to employees of a particular manager. Currently due to no filters or criteria based setting in distribute tab she is unable to send the emails.

Solution description

Ability to set up criteria to schedule invites and reminders for participants based on the roster criteria will solve Jane's problem.

1. Email ID/Unique Identifier
2. Name
3. Manager Email Address
4. Start Date
5. End Date
6. Employee Status
7. Location
8. Level
9. Function/department
10. Status
11. Date of birth
12. Tenure
13. Generation
14. Gender
15. Race
16. Veteran status
17. Disability status
18. (New custom fields) Any custom field admin adds to subject can be used as criteria

Final Wireframes

Add Group - Criteria Setting

- Compose
- Sent
- Templates

From : Shruti+1 (shruti.garg+1@questionpro.com)

To : Select email address

Add Group

Email : Default Template

Subject : Share your thoughts

Hello,

We would appreciate your feedback in our online survey. All responses will remain confidential and secure. Thank you in advance for your valuable insights. Your input will be used to ensure that we continue to meet your needs. We appreciate your trust and look forward to serving you in the future.

We have contracted with QuestionPro, an independent research firm, to field your confidential survey responses. Please click on this link to complete the survey:

{SURVEY_LINK}

Please contact {OWNER_EMAIL} with any questions.

Thank You

Set Employee Filter - Save or used saved filter

Workforce Test Sample > Sample Survey

Global search for users, surveys, tickets Admin Upgrade Now ? S

Setup Employee Filter ?

Create New Name

Group 1

IF Name or Email is

+ Add Criteria Group

Members Matched Save

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{SURVEY_LINK}

Please contact {OWNER_EMAIL} with any questions.

Thank You

B I U Font Size A A

Select demographics from roster

The screenshot displays a 'Setup Employee Filter' dialog box in a software application. The dialog features a search bar at the top with the text 'Global search for users, surveys, tickets'. Below the search bar, there are navigation options: 'Edit', 'Send', 'Analytics', and 'Manage Data'. The main area of the dialog is titled 'Setup Employee Filter' and contains a 'Create New' dropdown menu, a 'Name' input field, and a 'Group 1' section with a trash icon. A filter rule is shown: 'IF Name or Email is'. A dropdown menu is open, listing options: 'Name or Email', 'First Name', 'Last Name', 'Start Date', 'End Date', 'Metadata', 'Employee Status', and 'All Employees'. Below the filter rule, there is an 'Add Criteria Group' button and a 'Members Matched' label. A 'Save' button is located at the bottom right of the dialog. The background interface includes a top navigation bar with 'Workforce', 'Test Sample', and 'Sample Survey'. A search bar and 'Admin' dropdown are also visible. The bottom of the screen shows a rich text editor toolbar with options like 'B', 'I', 'U', 'Font', 'Size', and 'Source'.

Criteria based

The screenshot shows a software interface with a 'Setup Employee Filter' dialog box. The dialog has a title bar with a close button. Inside, there is a 'Create New' dropdown menu, a 'Name' field containing 'Test', and a 'Group 1' section with a trash icon. Below this, there is a table-like structure with columns for 'IF', 'Metadata', and a dropdown menu. The dropdown menu is open, showing a list of criteria: '-- Select --', Location, Level, Function/Department, Status, Date of Birth, Tenure, Generation, Gender, Race, Veteran Status, Disability Status, and Unique ID. There are also '+ Add Criteria Group' and '+ Save' buttons. The background shows a blurred view of a survey editor with a toolbar at the bottom.

Workforce Test Sample > Sample Survey

Global search for users, surveys, tickets Admin Upgrade Now ? S

Edit Send Analytics Manage Data

Setup Employee Filter ?

Create New Name Test

Group 1

IF Metadata -- Select -- +

+ Add Criteria Group

Save

Font Size A A

SMS: \$0 (Buy More Credit)

Add Group or add multiple criterias

Workforce Test Sample > Sample Survey

Global search for users, surveys, tickets Admin Upgrade Now ? S

Edit Send Analytics Manage Data

Setup Employee Filter

Create New Name Test

Group 1

IF Metadata Function/Department Business Development/Sales

OR Name or Email is

Group 2 OR

IF Name or Email is

+ Add Criteria Group

Members Matched Save

Thank You

B I U Font Size A A [Rich Text Editor Icons]

SMS: \$0 (Buy More Credit)

Members Matched

Workforce Test Sample > Sample Survey

Global search for users, surveys, tickets Admin Upgrade Now ? S

Edit Send Analytics Manage Data

Setup Employee Filter

Create New Name Test

Group 1

IF All Employees

+ Add Criteria Group

Members Matched Save

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{SURVEY_LINK}

Please contact {OWNER_EMAIL} with any questions.

Thank You

SMS : \$0 (Buy More Credit)

Details of selected Members based on criteria

The screenshot displays a software interface for survey management. A modal window titled "Selected Employees" is open, showing a list of 12 employees. The background interface shows a survey configuration screen with a "Group 1" containing "All Employees".

Selected Employees

Member Count: 24

Employee	Email
Carl Underwood	shruti.garg+9@questionpro.com
Luke Peters	shruti.garg+8@questionpro.com
Tim Bailey	shruti.garg+7@questionpro.com
Dominic Davidson	shruti.garg+6@questionpro.com
Maria Arnold	shruti.garg+5@questionpro.com
Feb Parr	shruti.garg+4@questionpro.com
Eric Slater	shruti.garg+3@questionpro.com
Carl Underwood	shruti.garg+2@questionpro.com
Luke Peters	shruti.garg+1@questionpro.com
Tim Bailey	shruti.garg+16@questionpro.com
Dominic Davidson	shruti.garg+15@questionpro.com
Maria Arnold	shruti.garg+14@questionpro.com

Background interface details:

- Workforce
- Test Sample
- Sample Survey
- Global search for users, surveys, tickets
- Admin
- Upgrade Now
- Group 1
- IF All Employees

Thank You