Setting Up Quotas In Your Qualtrics Survey

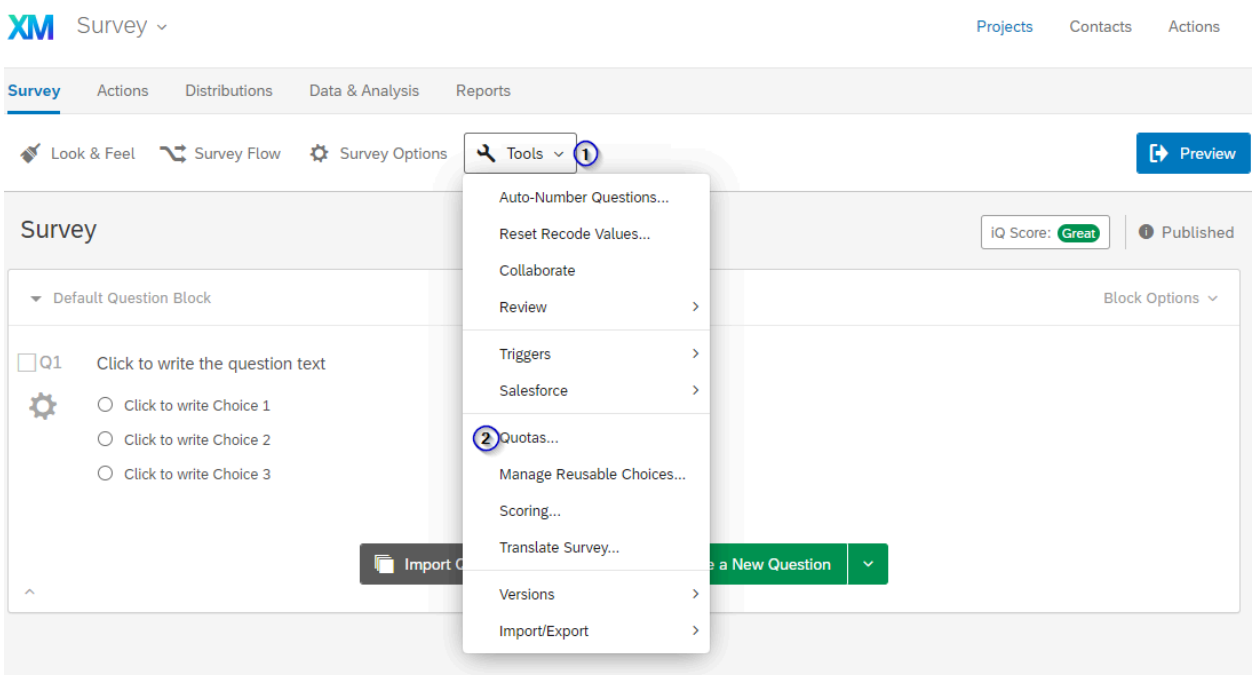
If the study you are launching has any quota requirements, then we strongly recommend having these quotas set up in your Qualtrics survey in addition to having CloudResearch target for your demographic specifications. There are several reasons why this is important:

1. CloudResearch targets participants based on pre-profiled data, but some demographics change over time, e.g. work status, relationship status, etc. Having quotas set up in your Qualtrics survey will allow you to target participants with the highest precision because their demographic information is being submitted in real time through your quotas.
2. Using quotas in your survey will also enable you to gather data on unprofiled characteristics. For example, if you would like no more than 20% of your sample to be pet owners that eat fast food once per week, but you don't see this targeting in CloudResearch's panel options, then you can set it up in your own survey.
3. Having quotas in your Qualtrics survey will provide you with the ability to see the progress of reaching your desired quota goals in real time. This will allow you to have a better sense of your study health as well as providing you with the ability to make any adjustments that may be needed.

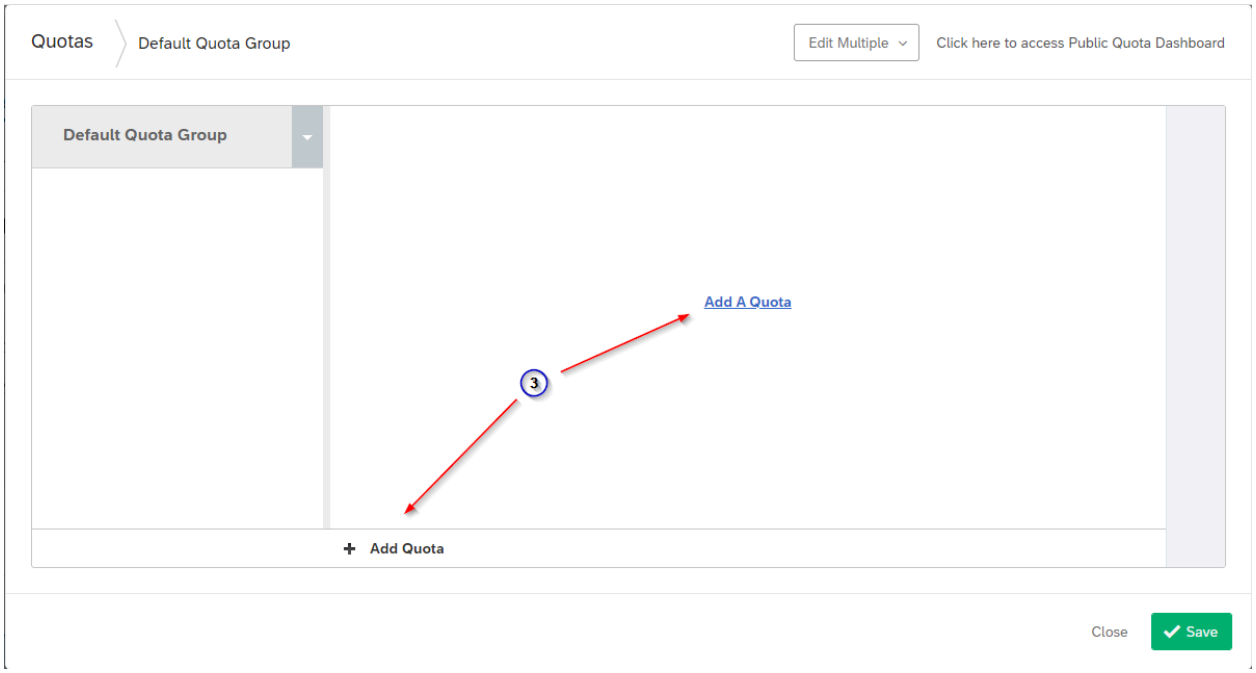
The following guide will provide step by step instructions for setting up basic quotas on Qualtrics.
If your study has many quotas and requires a more involved setup, you can visit the Qualtrics quota support page for more options and instructions on setting up *Cross Logic Quotas*.

Generating a Quota

1. Click *Tools.*
2. Choose *Quotas.*

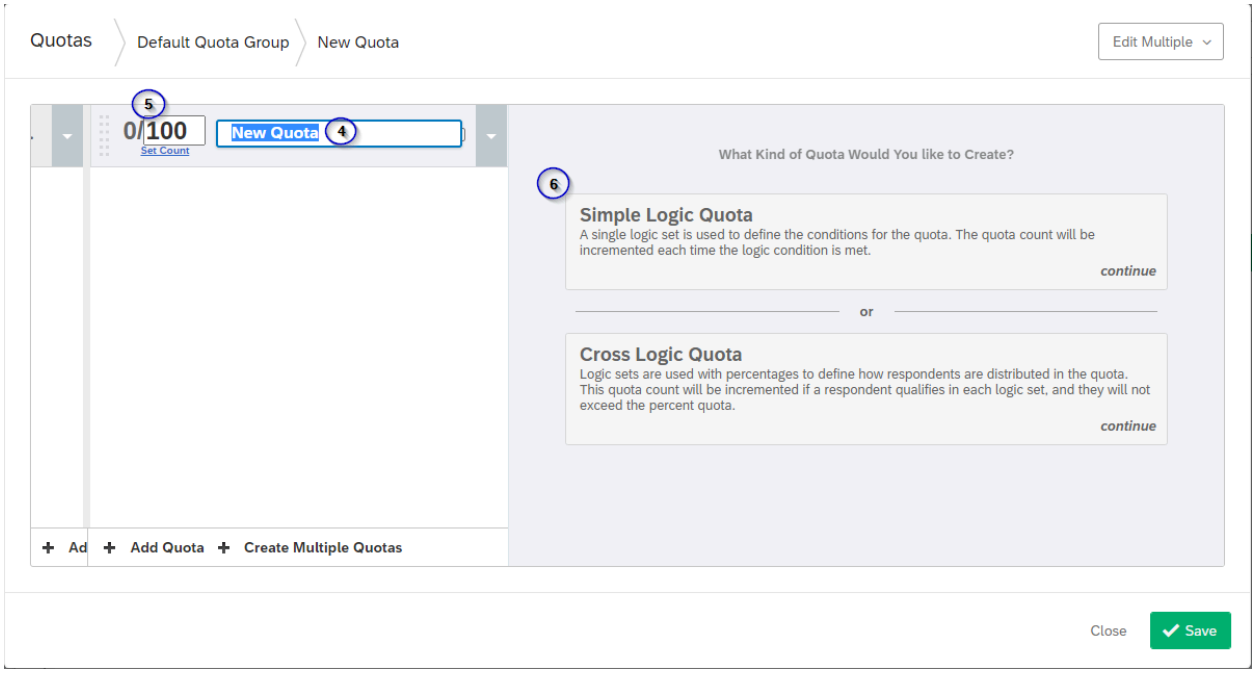


3. Select either *Add Quota* or *Add A Quota.*

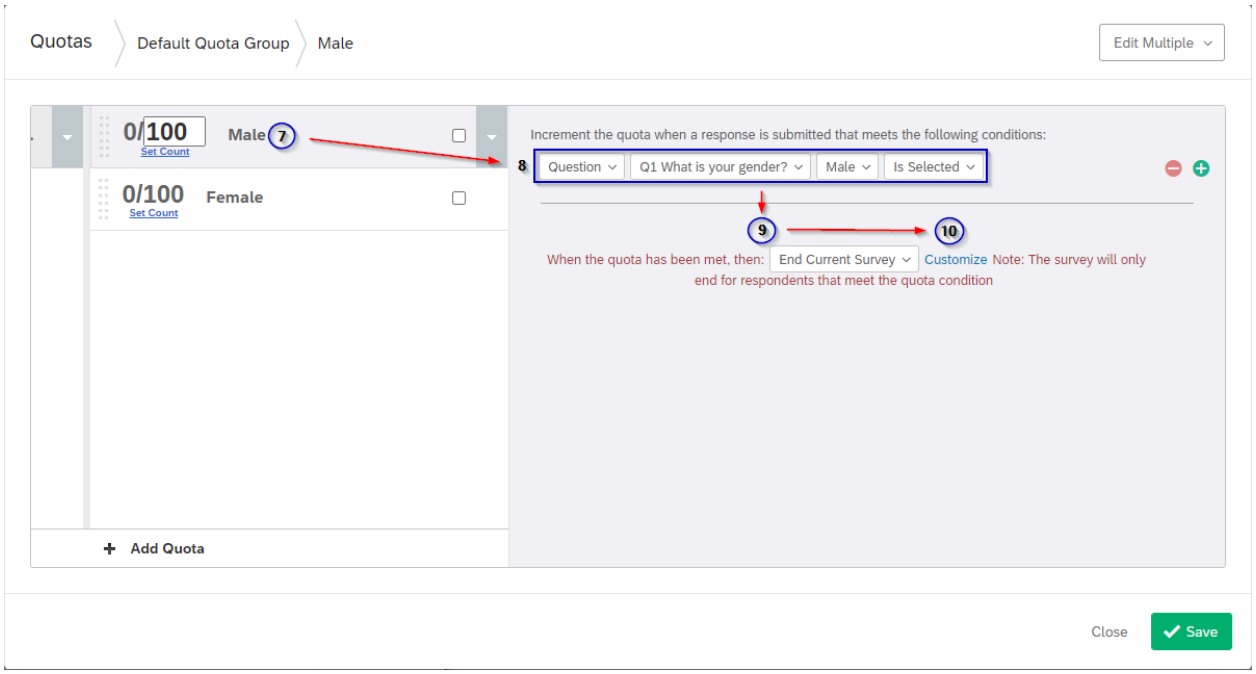


4. Name your quota by clicking on *New Quota.*
5. Set your quota limit i.e. when this number is reached the participants in this quota category will no longer be able to enter the study.
6. Select *Simple Logic Quota.* If your study has many demographic quotas and you need a more complex setup, then you can select *Cross Logic Quotas* and follow this link for instructions.

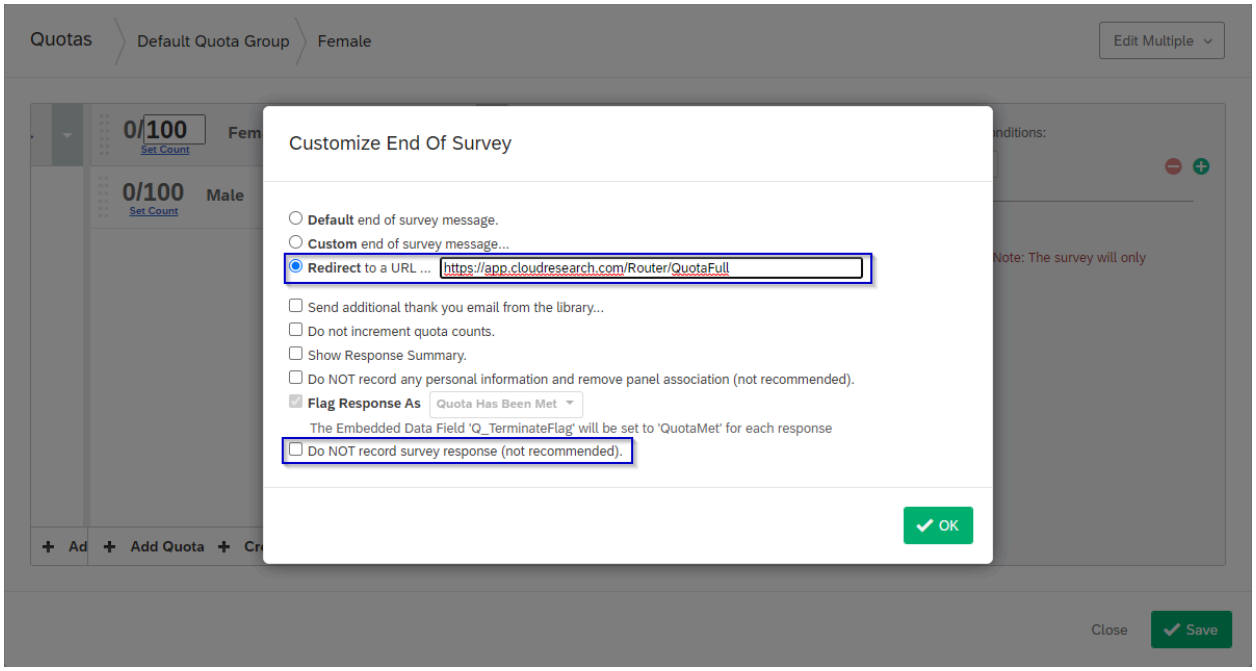
a. You can also click *Set Count* to artificially adjust the number of responses that are being counted towards the overall quota limit. This is useful if any data was collected prior to the quota being set up.



7. Select the first quota you would like to set up. In this case, *Male.*
8. Set the conditions and logic to match the question that the quota is based on.
9. Set the drop down menu to *End Current Survey* in order to terminate any participants that are entering after the quota is reached.



10. After clicking *Customize* adjust the redirect to the following URL: https://app.cloudresearch.com/Router/QuotaFull
    a. Select *Do NOT record survey response* If you don't want survey responses that meet the quota to be recorded

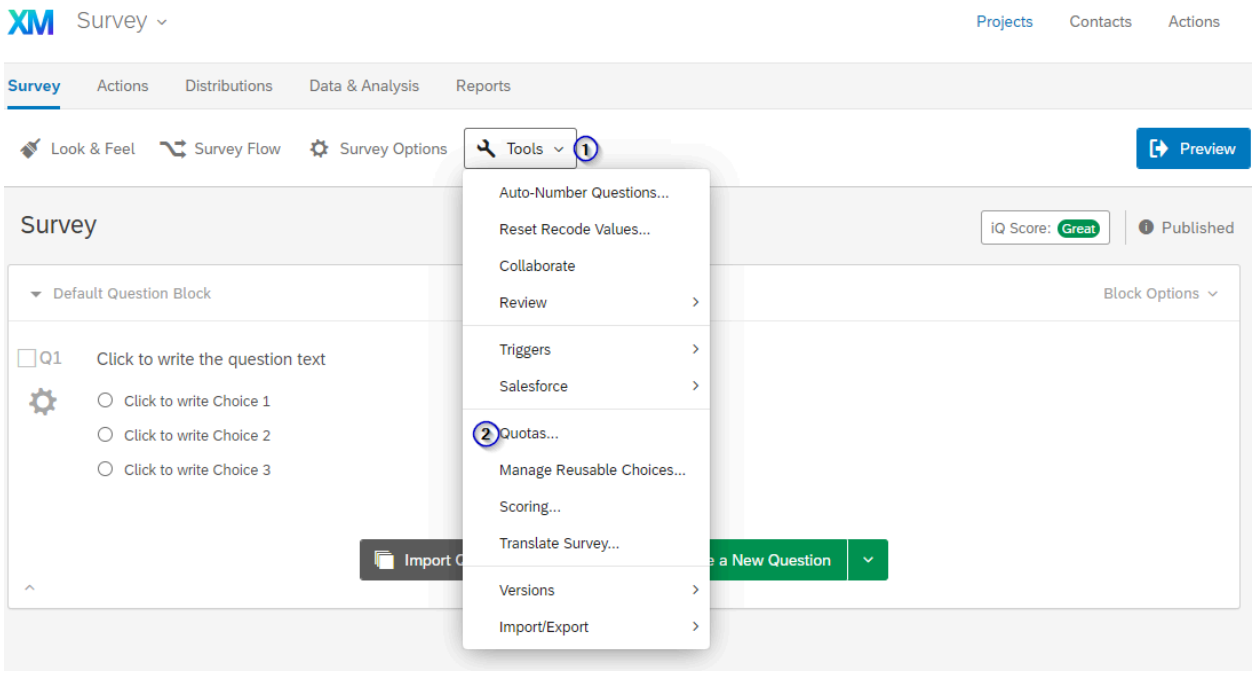


11. Repeat this process for the *Female* quota.

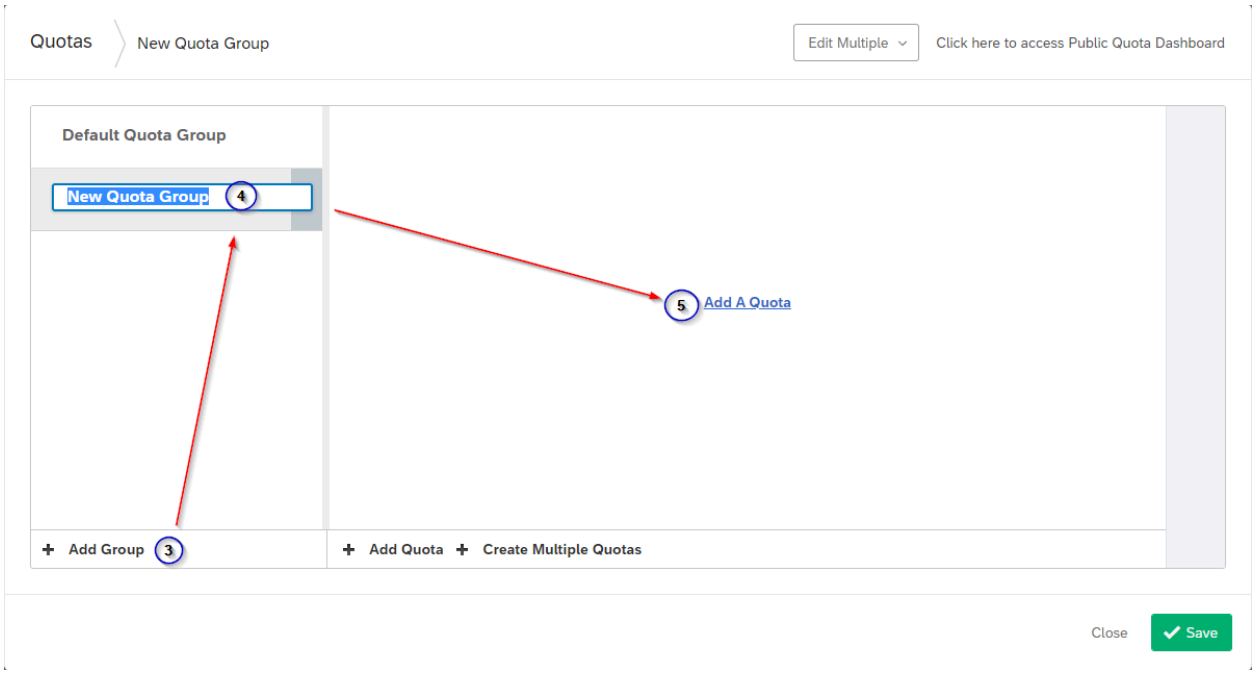
Creating a Quota Group

Use quota groups to keep your quotas organized.

1. Click *Tools.*
2. Choose *Quotas.*



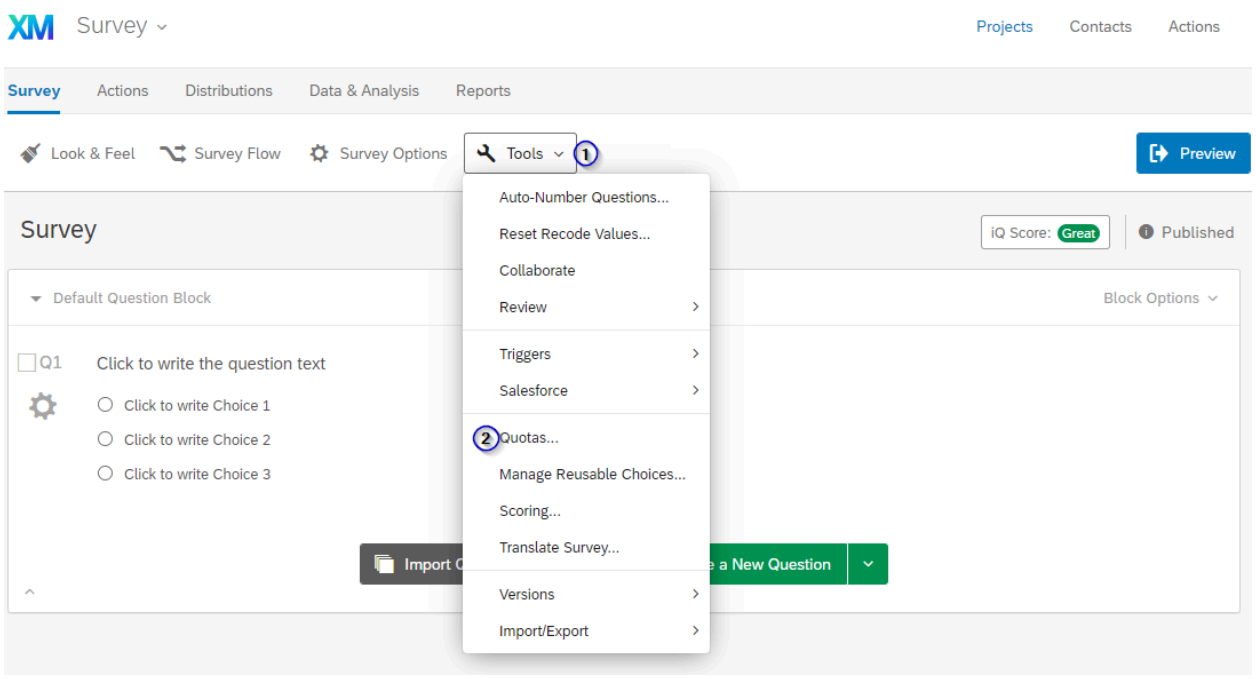
3. Click *Add Group.*
4. Click on *New Quota Group* to name your group, e.g. *Gender*.
5. Select *Add A Quota.*
6. Complete steps 4 - 10 as shown above in order to create a quota within the group.



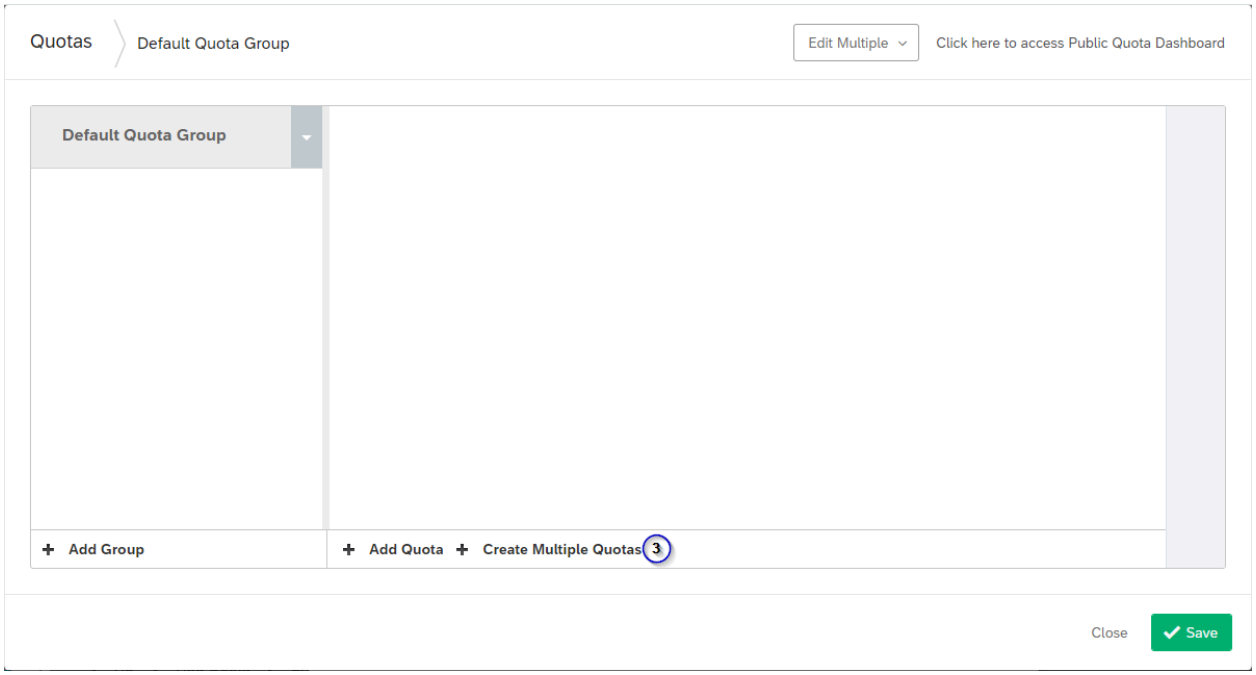
Creating Multiple Quotas

Create multiple quotas simultaneously instead of needing to create them 1 by 1.

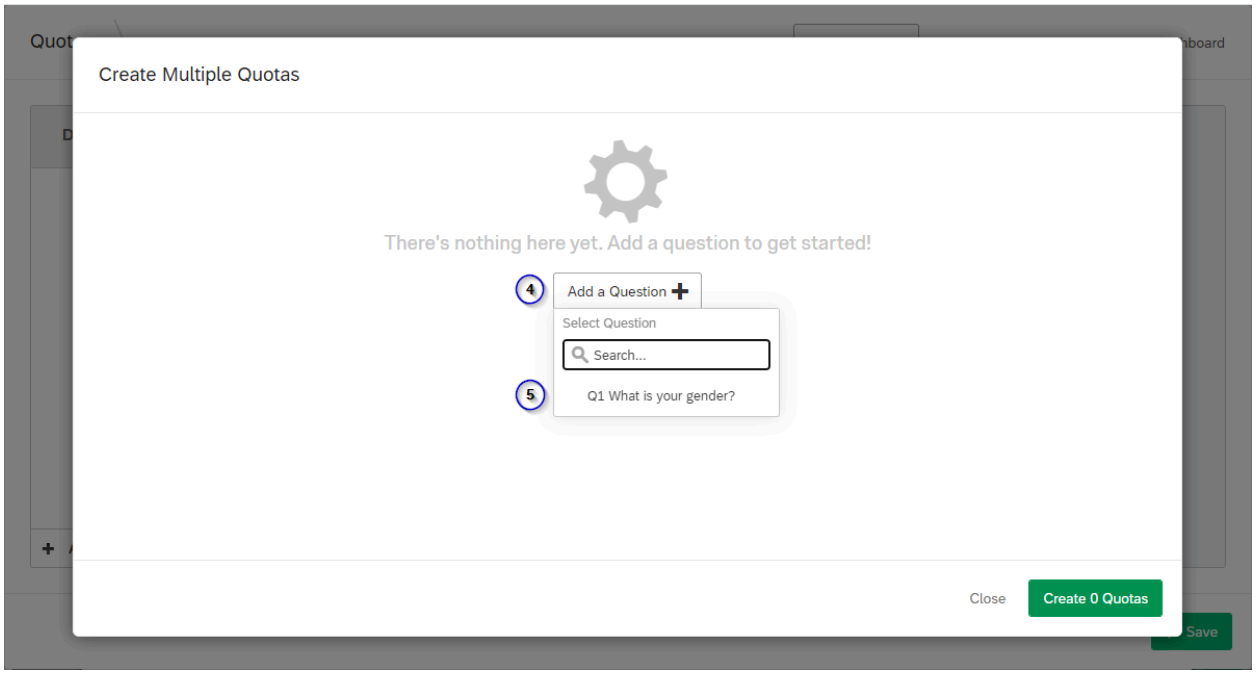
1. Click *Tools.*
2. Choose *Quotas.*



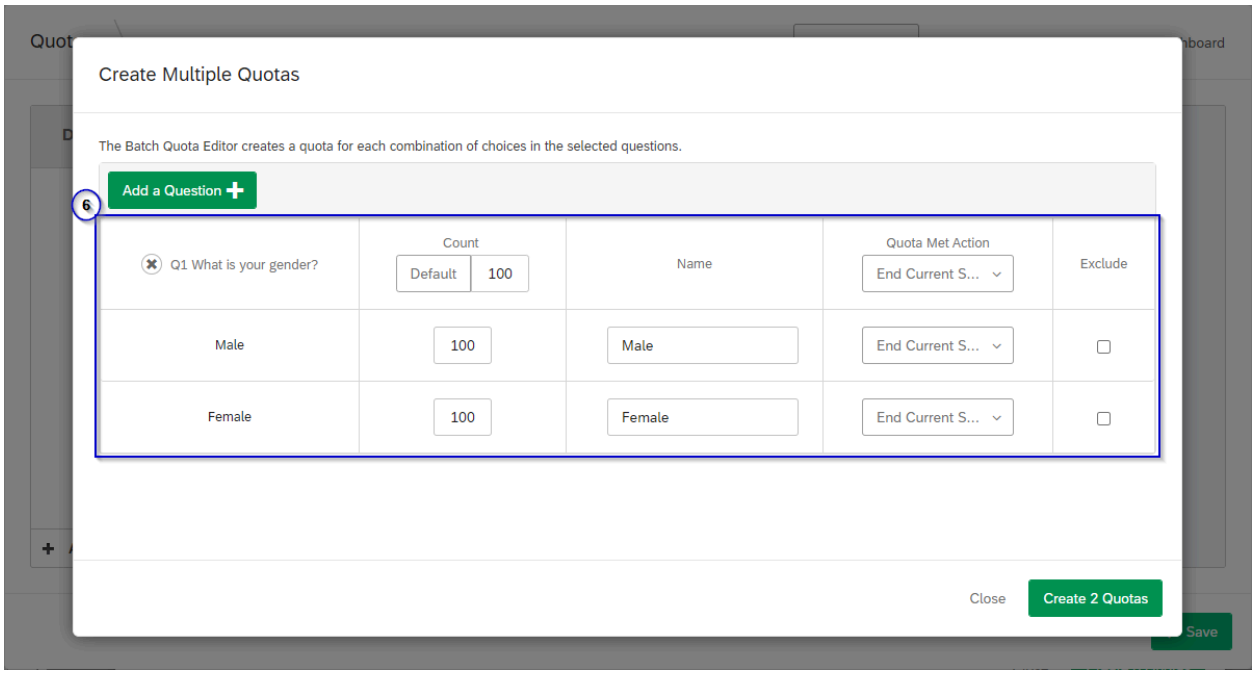
3. Select *Create Multiple Quotas.*



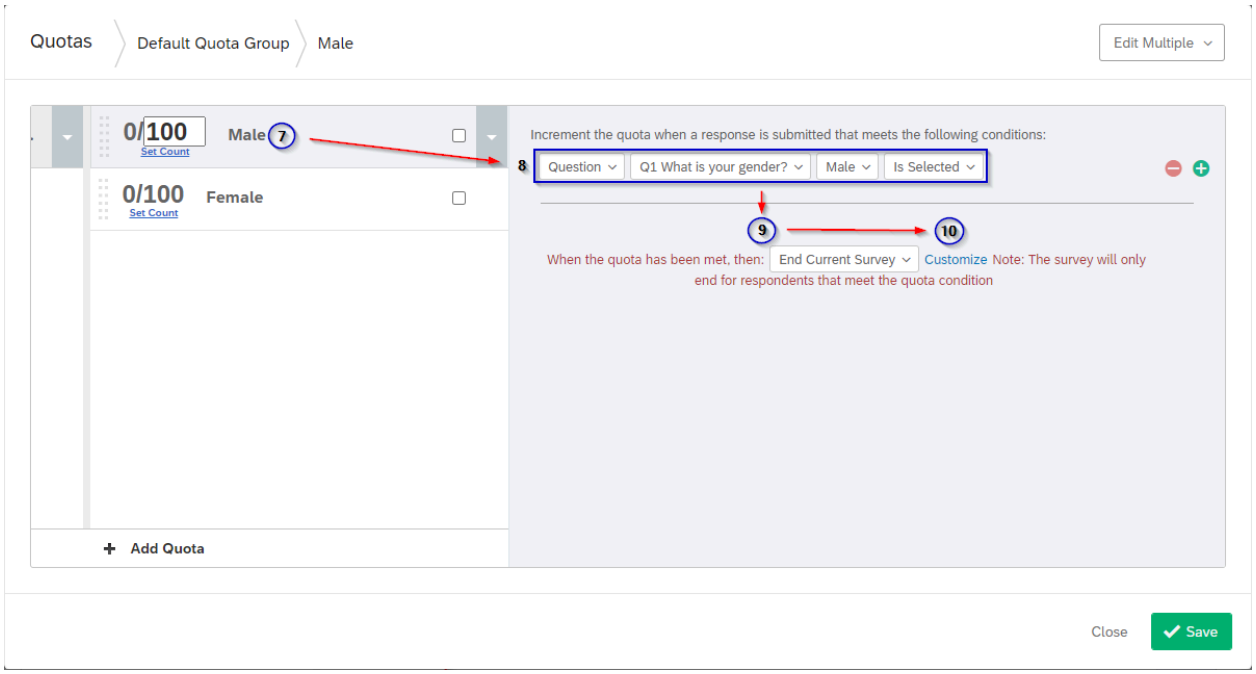
4. Click *Add a Question.*
5. Select the question you will be using to control your quota. For example, *What is your Gender?*



6. Set the conditions and logic according to your specifications.



7. Select the first quota you would like to set up. In this case, *Male.*
8. Set the conditions and logic to match the question that the quota is based on.
9. Set the drop down menu to *End Current Survey* in order to terminate any participants that are entering after the quota is reached.



10. After clicking *Customize* adjust the redirect to the following URL: https://app.cloudresearch.com/Router/QuotaFull
    a. Select *Do NOT record survey response* If you would like for survey responses that meet the quota to not be recorded

