Survey Quotas: Set a Limit for the Number of Responses to Collect

> Use caution when using quotas in combination with Data Retention Policy Settings. Learn more.

Quotas are limits you can set for the number of responses your survey collects. They can be set up on the overall survey (see **Overall Response Quota**), on a given question or segment (see **Segmented Quotas**), or, finally, on the survey share link (see **Link-based Response Quotas**).

Alchemer Quota Types Defined

Overall Response Quotas

The Overall Response Quota is the total number of completed responses for the entire survey. If you want to limit the total responses for your survey, this is the type of quota you will want to use. Once that quota is met, your respondents will no longer be permitted to submit a response.

Segmented Quotas

Segmented Quotas come in two varieties:

- **Logic Quota** allow you to collect a limited set of responses for people who match a specific set of logic.
- **Distributed Logic Quotas** allow you to collect an even distribution of responses across a wide set of conditions.

The Segmented Quota is a "question-based" quota. Using the segmented quota you can limit responses based upon fields in your survey, as well as email campaign fields and system data fields such as current date. Segmented quotas are most commonly set up based on how a respondent answers one question or a combination of questions in the survey. Once the segmented quota limit has been reached, you can control the respondent experience via the Quota Complete Settings. (If respondents do not answer the questions used in your segment conditions, they will be allowed to complete the survey.) A Segmented Quota added after collecting responses will include previously submitted responses when determining if the quota has been reached.

Linked Based Quota

The Link-based Quota is, as the name suggests, a quota set for each link sent out. For example, if you have multiple email campaigns set up you can set separate quotas for each email campaign link. Or, you might have shared your survey on Facebook or Twitter, as well as embedded it on your website; you can set separate quotas for these links as well. Once that quota is hit, your respondents will no longer be permitted to submit their response.

How Quotas Work

In high-traffic surveys, quotas are controlled by holding slots for all active responses. A response is considered "active," with respect to quotas, if the respondent has clicked either Next or Back on a survey page in the past 20 minutes.

> If you anticipate a large volume of responses all at once while using overall quotas, we recommend avoiding one page surveys. Pagination will allow the system to track active sessions more efficiently.
>
> Additionally, if you are paying a panel company for responses, you can work with your panel company regarding what quotas remain open.

Segmented Quotas: How do they work?

If you have multiple segmented quotas in a survey, and one of the quotas disqualifies the response, the other segmented quotas will not increment.

What Responses Count Towards Quotas (Overall and Segmented)?

- **Complete responses** - All complete responses will be counted towards quotas (including complete **Test responses**).
- **Quarantined responses** - If you have used the data cleaning tool to quarantine responses these will count towards your quota. If you wish to free up slots after quarantining responses, you can simply add the number of quarantined responses to your quota!

While, partial responses do not count towards a quota they do count towards the number of in-progress survey respondents.

It is also important to note that for overall quotas and link quotas, deleting a response will free up a slot in your quota.

Understanding the Too-Many-In-Progress Message

If you have an overall quota set, your respondents may receive a message informing them that there are too many survey takers in progress.

When does the too-many-in-progress message display?

If **1)** the number of "active" survey respondents *plus* **2)** the number of complete responses is equal to the quota; any new respondents attempting to access your survey will see the Too-Many-In-Progress Message. This applies to overall, segmented, and link-based quotas.

What is an "active" survey respondent?

A respondent is considered "active," with respect to quotas, if they have clicked the link to open a survey on a survey page in the past 20 minutes.

> 🎓 **Managing Your Respondents' Expectations When Using Quotas**
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> Because quotas slots expire after 20 minutes of inactivity, this can result in a respondent

being unable to finish their response. From a respondent's perspective this is often perceived as getting "kicked out" of the survey. Below are some suggestions for managing respondents' expectations when using survey quotas.

- Keep your survey pages short to ensure that response stays active.
- Use the page timer in order to be completely transparent that the respondent has 20 minutes to complete each page.
- We discourage using Save & Continue with Quotas as respondents' quota slot will not be saved.

Set Up an Overall Response Quota

1. Go to **Tools** > **Quotas**.

2. Click **Create Quota** > **Overall Quota**. Customize the following options:
   a. **Limit** - This is the total response limit for your survey (Overall Response Quota).

   b. **Quota Complete** > **When a Quota has Been Met** - Here, you can determine what action(s) will be taken when the specified quota limit is met. Choose from the following three options:
      i. **Stop collection of responses & show message** - no more responses will be collected and 'disqualify message' will be shown to any respondents attempting to take the survey.
         - **Disqualify Message** - Customize the message that respondents see once the quota limit has been reached.
         - **Too Many In-Progress Message** - Customize the message that respondents see if there are too many respondents in progress. Learn more about this scenario.

      ii. **Stop collection of responses & redirect to a URL** - no more responses will be collected and respondents attempting to take the survey will be redirected to specified URL.

      iii. **Continue collecting responses** - continue to collect responses in excess of the specified limit. *NOTE: The Quota Notification options are not compatible with this option.*

   c. **Quota Complete** > **Quota Notification** - choose to receive notification in the form of email and/or webhookonce the quota limit has been reached.
      i. **Send notification email** - Send a notification to a **user** on your Alchemer account (Limit 5 email addresses).

      Once the specified limit for your overall quota has been met, a notification email will be sent to the email addresses specified in the **Send quota complete notification to** field with a subject line of **You've reached your quota limit** and the following content:

ii. **Webhook -** Once the specified limit for your overall quota has been met, you can trigger a webhooknotification (asynchronous).
    - Check the Webhook checkbox to configure your webhook.
    - Enter a **Name** for your webhook.
    - Choose the **Method** - **POST** or **GET**
    - Specify the **URL** for your endpoint.
    - Enter the **Content** as a Key-Value pair i.e. quota=full (multiple pairs can be included and should be joined with an **&** i.e. quotaname=overall&status=full

3. Once you have finished setting up your Overall Quota, **Save Quota.**

Set Up a Segmented Quota

> Using **and/or logic** in conjunction with quotas may not work as expected. When building Segmented Quotas using logic, Alchemer recommends using Groups in Logic Rules, as opposed to and/or conditional logic. Follow the linked documentation above for more information on building out multiple conditions.

1. Go to **Tools** > **Quotas**.

2. Click **Create Quota** and select the type of Segmented Quota that you want to configure:
    - **Logic Quota** - Collect a limited set of responses for people who match a specific set of logic.
    - **Distributed Logic Quota** - Collect an even distribution of responses across a wide set of conditions.
    - Not sure which type of Segmented Quota you should use? Explore the differences between Logic Quotas and Distributed Logic Quotas.

3. **Customize** the **Name, Limit,** and **Description** fields. The **Limit** will determine number of responses collected by this segment.

4. The **Logic** section is where you configure the logic condition(s) by which you would like to limit responses. You can set conditions based on questions asked within the survey, email campaign fields, system fields, such as current date, etc. This example uses a **Logic Quota** to limit the responses collected for those respondents who identified as female to 50 responses.

5. Next, customize your Quota Complete options. New Logic and Distributed Logic Quotas start with your survey's Default Complete Actions, so you may not need to change anything here. Learn how to set Default Complete Actions.

6. When finished, make sure to **Save Quota** (bottom right).

> The use of the **is not answered** as well as the **is not one of the following answers** logic operators in segmented quotas does not function in conjunction with each other/ We recommend using the **positive logic parameters** available when building out Segmented Quotas.

Manage Logic and Distributed Logic Quotas

Market research studies often need dozens, or even hundreds, of segmented quotas. The Logic Quotas list on **Tools > Quotas** lets you keep them in a meaningful order, update many at once, and copy them without redoing their setup.

These options apply to Logic and Distributed Logic Quotas. Overall Quotas and Link-based Quotas aren't affected.

Reorder Quotas

By default, new quotas are added to the bottom of the list. To put them in the order you plan your study:

1. Go to **Tools > Quotas**.

2. In the Logic Quotas list, hover over a quota and grab its drag handle.

3. Drag the quota to its new position. A line shows where it will land.

4. Release to drop it in place.

To move several quotas together, select them with their checkboxes first, then drag any one of the selected quotas. A label shows how many quotas you're moving (for example, "Move 3 Quotas").

Your order is saved for the survey, and everyone who works on the survey sees the same order. It's also kept when you copy or transfer the survey.

Reordering only changes how the list is displayed. It doesn't change quota logic, limits, Complete Actions, or the order in which quotas are evaluated.

Sort Quotas by Name

Click the **Name** column header to sort quotas alphabetically. Click it again to sort in reverse.

Sorting changes only what you see. Your saved order isn't overwritten. While a sort is applied, drag and drop is turned off. If you try to move a quota, you're prompted to **Cancel** or **Clear sorting**.

To return to your saved order, click **Clear sorting** below the list.

Select Multiple Quotas

Each quota in the Logic Quotas list has a checkbox. Select the quotas you want to work with, or use the checkbox in the table header to select or clear every quota at once.

When at least one quota is selected, a bar above the list shows how many are selected (for example, "9 Selected") along with the actions you can take: **Complete Actions** and **Delete**.

Your selection isn't saved as a group. It clears after you apply a change.

Set Complete Actions for Multiple Quotas

Use this when many quotas should do the same thing once they fill, for example, sending over-quota respondents back to your panel provider.

1. Go to **Tools > Quotas** and select the quotas you want to update.
2. Click **Complete Actions** in the selection bar. A panel opens showing how many quotas you're editing.
3. Choose what happens **When a Quota has Been Met**, and set any **Quota Notification** options. These are the same settings you see when editing a single quota.
4. Click **Update N Quotas**, where N is the number of selected quotas.
5. Review the confirmation, then click **Apply**. Click **Cancel** to go back to the panel without saving.

If the selected quotas are set up differently today, the setting shows **Mixed values**. Every Complete Action setting in the panel is applied to every selected quota.

Only Complete Actions are updated. Quota names, logic, and limits stay as they are.

Set Default Complete Actions for New Quotas

If most of your quotas should behave the same way when they fill, set it once as the survey default. New Logic and Distributed Logic Quotas start with these settings.

1. Go to **Tools** > **Quotas**.
2. Click **Default Complete Actions**.
3. Choose what happens **When a Quota has Been Met**, and set any **Quota Notification** options.
4. Click **Save**.

The default applies to new quotas only. Existing quotas don't change. To update quotas you've already built, use Set Complete Actions for Multiple Quotas.

To go back to Alchemer's standard settings, open **Default Complete Actions**, click **Reset to system default**, then click **Save**.

Copy a Quota

Copying a quota is a quick way to build a similar cell, such as the same segment for a second market. Click the copy icon on the quota's row. The copy appears directly below the original.

The copy keeps the original's logic, limit, and Complete Actions, so there's nothing to set up again. Its response count starts at zero. Rename it and adjust its logic as needed.

Delete Multiple Quotas

1. Select the quotas you want to remove.
2. Click **Delete** in the selection bar.
3. Click **Delete** to confirm, or **Cancel** to keep them.

Deleting a quota removes its logic, limit, and Complete Action settings, and it can't be undone.

Editing Quotas

You can edit all quota types. It can take up to 3 minutes for the following edits to be reflected in your survey: Deleting or adding a quota, deleting or editing a response.

Please note: We highly discourage editing quotas in a live survey. If you must make a change to your quota, close your survey before doing so.

Bulk changes follow the same guidance. If you need to update Complete Actions for many quotas on a live survey, close the survey first.

Changing the order of quotas in the list never changes how they're evaluated, so you can reorder quotas at any time.

Set Up Link-Based Quotas

1. Go to the **Share** tab.
2. Click **Customize** below your Primary Share Link or click on the name of a link from your list of links (on the bottom-half of the share page).
3. Click **Advanced** and set the **Response Quota** for this link.
4. Set your **Closed Message** that will display when the quota is met and **Save**.

Monitoring Your Quotas

Once your survey goes live, you will probably want to keep a close eye on your quotas. There are several places where you can track your quotas' progress.

Explore the Survey Quotas: Monitor Progress documentation to see what's available!

Best Practice Tips: How to Avoid Going Over Quota

- Set your survey's Default Complete Actions before you build segmented quotas. Every new quota picks it up, so you won't need to configure each quota separately.
- We discourage editing quotas in a live survey. If you must make a change to your quota, close your survey before doing so.
- If you anticipate a large volume of responses all at once while using overall quotas, we recommend avoiding one page surveys. Pagination will allow the system to track active sessions more efficiently. Additionally, if you are paying a panel company for responses, you can work with your panel company regarding what quotas remain open.
- We discourage the use of Email Campaign contact fields in your quota logic, particularly in combination with the **is answered** and **is not answered** operators. Instead, we recommend storing this data in Hidden Value Actions using the Hidden Values in your logic conditions.

Compatibility With Other Alchemer Features

Edit Links

Using an edit link can cause you to go over quota as completing a partial response via an edit link will not count towards the quota.

If your quota is met, you will not be able to use partial edit links. If you must make changes to a partial response once the quota has been met, you will need to increase your quota.

Save & Continue

If you are using Save & Continue with Quotas, it is important to note that the respondent's spot will not be saved. When respondents attempt to return to the last page they viewed, they will be able to continue only if the quota has not been reached. If you are using Save & Continue we recommend customizing the Save & Continue message and/or the Save & Continue email message to alert respondents that this is the case.

Convert Response Status

Within Individual Responses if you choose to convert a partial response to complete this will affect quotas. This can lead to in-progress respondents being kicked out of the survey.

Copy a Survey

When you copy a survey and select **Copy Quotas**, each copied Logic and Distributed Logic Quota keeps its own Complete Actions, and the quotas keep their saved order. Page and question logic that depends on those quotas is kept in the copy too.

The survey's Default Complete Actions are copied only if you also select **Copy Default Complete Actions**. This option is off by default. If you leave it off, the new survey uses Alchemer's standard settings for new quotas.

Transfer a Survey to Another Account

When you transfer a survey to another account, its Overall, Logic, and Distributed Logic Quotas transfer with it. Their logic, limits, saved order, and Complete Actions are kept, along with the survey's Default Complete Actions.

Quota settings transfer whether or not you select **Transfer Responses**. If you transfer responses, quota progress is recalculated in the new account from those responses. If you don't, quotas start at zero.

If a quota's logic uses a Question Library question that becomes unlinked during the transfer, the quota's logic and limit are still kept.

Data Import & API Data

When data is imported to Alchemer or collected through API, that information will not be counted towards survey quotas.

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