Select Survey .NET

v5

VIRTUAL INCENTIVES

User Guide

SelectSurvey.NET + Virtual Incentives User Guide

v.5.0 9/2021

Easily send Virtual Rewards to survey recipients with the automated integration with Virtual Incentives reward products.

Contents

Overview of the SelectSurvey + Virtual Incentives Integration

Send virtual rewards to survey recipients automatically using the built-in integration with Virtual Incentives.

Go to https://www.virtualincentives.com for more information on Virtual Incentives.

This document details initial configuration and usage.

How to Use (survey creator)

Paste the ###VI=REWARDURL### in any page of the survey or email to implement.
The token will be replaced with the Virtual Reward URL link upon taking the survey.

What is it for?

Virtual Incentives integration overview:

- Easy, automated, instant incentive payouts for employees, partners, or research participants.
- Increase survey participation and response rates
- Incentives for HR

Optional Advanced Implementation

- Use ActiveLogic to determine reward distribution after survey completion:
    - based on question answers
    - based on score
    - based on user attributes
    - based on email list attributes
- Use page conditions to determine reward during survey:
    - Based on question answers
    - based on score
    - based on user attributes
    - based on email list attributes
- Ability to configure easily per survey
    - Survey Options > API > pick brand, set award amount.
- Ability to control your branding
    - Virtual Incentives can also set up branding

- Automate with email list, survey completion, ActiveLogic
  - Place the piping token where you want the reward link to display

Setting up Initial API Token (admin user)

The below instructions are for the admin and this is a one time setup. Once the initial web service token is setup, survey creators can implement the Rewards on a survey by survey basis.

1) Login to SelectSurvey and click on "Admin Tools" > "Web Service/API Tokens.." as shown in the below screenshot:

2) Add the token by filling in the form as shown below. Your username and password are provided by Virtual Incentives. The URL should remain as shown. The nickname can be whatever you want. This will show on the dropdown of the survey options page so name so survey creators will understand what it is for. Then click "Save" at the bottom of the page.

NET V5.0   🔔 0   👤 Joe User ▾

Click to create a new
web service token

Web Service Tokens Assignment
This page allows assignment of web service tokens (or nicknames) for third party web service/API used in dynamic tokens or databae question types

Create Web Service Token

Delete	API Token Nickname	Web Service Name	Web Service URL	Web Service Method	Edit
☐	country	country	http://www.webservicex.net/country.asmx	GetCountries	🖉
☐	Virtual Incentives		https://rest.virtualincentives.com/v6/JSON/		🖉

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☐ Click here to select or deselect all web service tokens.

Delete Checked

Web Service/API Tokens Assignment

This page allows assignment of web service/API tokens (or nicknames) for third party web service/api used in dynamic tokens or data

Add Web Service/API Token (Nickname):

Web Service Token Nickname:*
Token Nicknames must be unique. No special characters are allowed.

Virtual Incentives   Example: country

Web Service Name (SOAP) or Web Service Contract (WCF)*
No special characters are allowed.

SOAP Example: country
WCF Example: IAdministration

Web Service/API URL (SOAP) or Web Service Endpoint (WCF): *
i.e. http://your.com/yourapi.asmx

https://rest.virtualincentives.com/v6/JSON/
SOAP Example: http://www.webservicex.net/country.asmx
WCF Example: http://webservices.com/webservices/Administration.svc

Web Service/API Method: *
Enter the method for ths API ex: GetCountries() The arguments, if any, are specified on the edit item page.

Example: GetCountries

Optional Additional Configuration:

Web Service/API Credentials Username: *
Enter the username required to access the API.

Example: (leave blank)

Web Service/API Credentials Password:*
Enter the password required to access the API.

Example: (leave blank)

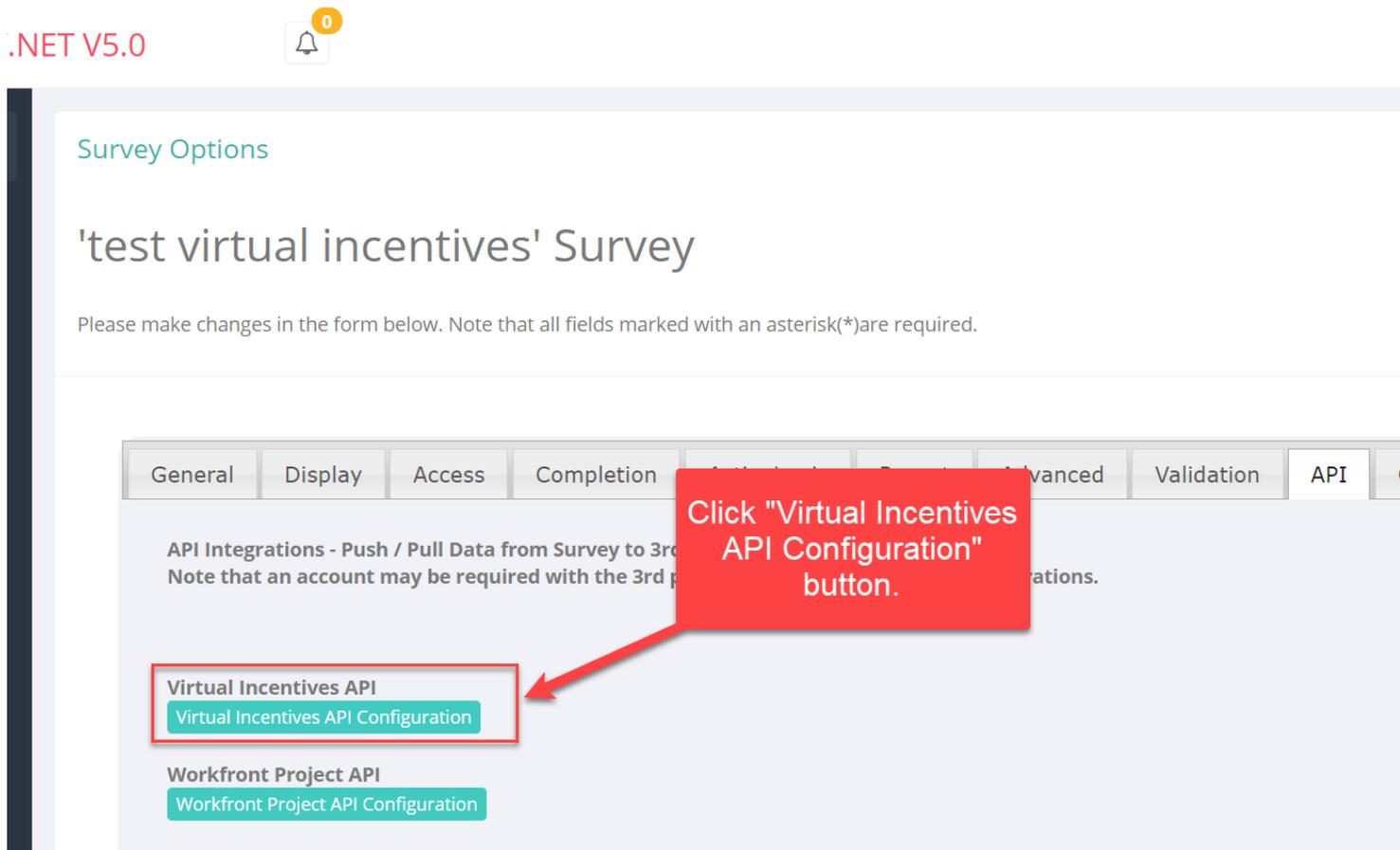**Web Service/API Credentials Encryption Key:***
Must be over 8 characters long, or left empty. Enter the encryption key used by the API to encrypt/decrypt login credentials.

Example: (leave blank)

Add to your survey (create user)

You have created a survey that you want to add a reward URL to the survey completion page. Below are steps:

1) Click "Survey options" > "API" > Click the "Virtual Incentives" green button.

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Survey Options

'test virtual incentives' Survey

Please make changes in the form below. Note that all fields marked with an asterisk(*)are required.

General	Display	Access	Completion			vanced	Validation	API	

API Integrations - Push / Pull Data from Survey to 3rd
Note that an account may be required with the 3rd p   ations.

Click "Virtual Incentives API Configuration" button.

Virtual Incentives API
Virtual Incentives API Configuration

Workfront Project API
Workfront Project API Configuration

2) Select the Virtual Reward Options as desired and click "save". As shown in the screenshot below, you can select what virtual reward under "SKU", what "Program" (this includes your branding), and the amount of the reward and the source for the recipients email address first and last name.

Send Rewards via Virtual Incentives Upon Survey Completion

To place a link to the virtual incentive reward, place the token ###VI=REWARDURL### in the completion message box where desired.

VIRTUAL INCENTIVES

Sign up for a Virtual Incentives account by contacting:
Danny Farkas dfarkas@virtualincentives.com , Virtual Incentives M: +1-973-460-5460 Let's Talk Rewards or Schedule a Call

After your account with VI has been created, enter your credentials in this application in "Admin Tools" > API/Web Service Tokens. Then it will show up in the "Connector" dropdown box below.
Email tech@classapps.com for assistance in setting up your account in Admin Tools.

☑ ✓ Check to Activate

VI Connector*
[Virtual Incentives   ▼]

VI Reward Program*
[SelectSurvey Virtual Visa - USD - Virtual Reward - USD   ▼]

VI Product SKU*
[GVC-V-12M - Virtual Visa® Reward (Global) - 12-Month, 90 Days to Redeem   ▼]

Required Respondent Information:

Source for Recipient Email Address*
[###UD=EMAIL_ADDRESS###   ▼]

Source of Recipient First Name*
[###UD=FIRST_NAME###   ▼]

Source of Recipient Last Name*
[###UD=LAST_NAME###   ▼]

Reward Amount: [$USD ▼] [10   ]

Cancel   Save

As you can see from the dropdowns for "Email Address", "First Name", "Last Name" you have an option for Anonymous users, or to pull the information from their login data (UD for user data) or from the email list (ED for email data) or from a question in the survey.

Required Respondent Information:

Source for Recipient Email Address*

###UD=EMAIL_ADDRESS###

Source of Recipient First Name*

###UD=FIRST_NAME###

Source of Recipient Last Name*

###UD=LAST_NAME###

| Please Select source for Recipient Last Name |
| ###UD=LAST_NAME### |
| ###ED=LAST_NAME### |
| Question in Survey |
| Anonymous |

3) Add the piping token to the completion page as shown in the screenshot below. You can place the token in a completion email, in the completion page that is displayed in the survey, on a survey page, or from ActiveLogic workflow. Simply paste the token where you want it to appear.

Completion Page Header: Page header example: Survey Completed!

Completion Message Enter a message to display to the user after completing the survey. You may use HTML to fo desired.

OPEN TEXT REPLACEMENT TOKEN REFERENCE
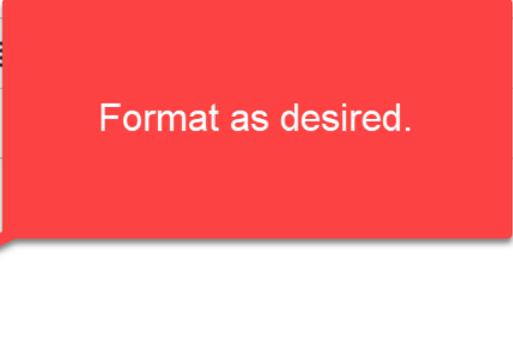
File   Edit   View   Insert   Format   Tools   Table

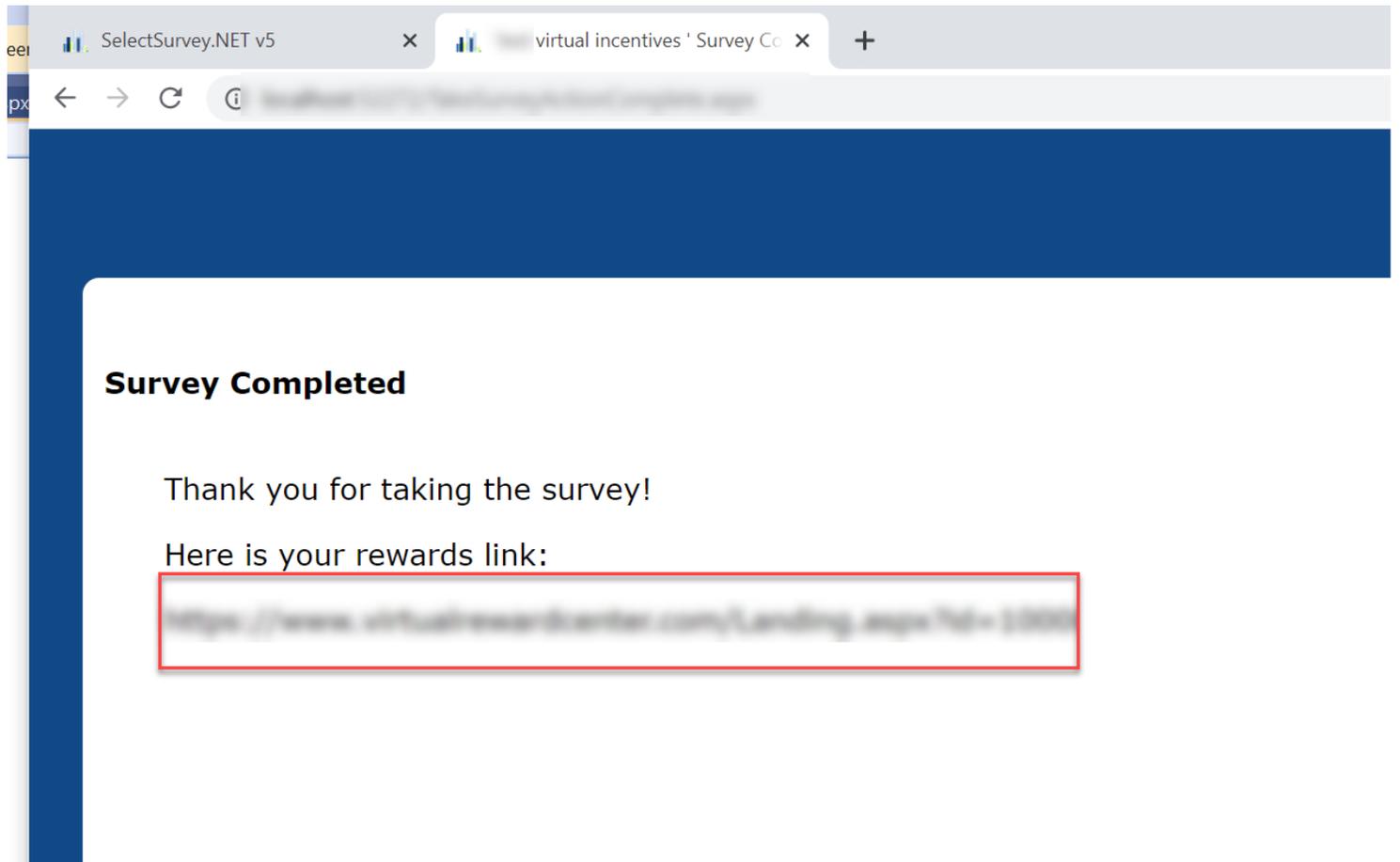A ∨   ✎ ∨   B   I   ≡   ≡   ≡

System Font   ∨   12pt   ∨

Thank you for taking the survey!

Here is your rewards link:

###VI=REWARDURL###

Format as desired.

P

When the respondent takes the survey they will see the reward link where you placed it:

The recipient clicks on the link and is taken to their virtual reward on the virtual incentives web site. The order is logged on Virtual Incentives as well as in SelectSurvey.