[HOW] Automated data flow to and from a survey in Questback Essentials

	FILE BASED	URL BASED		API BASED
QUESTBACK SOLUTION	**INTEGRATION UTILITY** Windows based utility, to be installed on a customer server, to import file based data about invitees.	**DYNAMIC LINKS** Survey URL enhanced with extra parameters to capture and include data from an external source system.	**QUESTION & ANSWER TAGS** Re-direction URL in the survey, enhanced with Question & Answer Tags to include and pass on selected survey/feedback data.	**API INTEGRATION (*)** Flexible data flow via the Questback API, based on extensive library of integation calls, with standard Webservices/SOAP technology. (*) API based connectors available for specific workflows.
DATA FLOW	**TWO-WAY** to and/or from a survey in Questback Essentials	**ONE-WAY** to a survey in Questback Essentials	**ONE-WAY** from a survey in Questback Essentials	**TWO-WAY** to and from a survey in Questback Essentials .
TRIGGER	To be defined in the **INTEGRATION UTILITY**, for the data flow to and/or from a survey in Questback Essentials.	To be defined in the **SOURCE SYSTEM** where the survey URL is embedded, for the data flow to a survey in Questback Essentials.	To be defined in the **SURVEY** where the re-direction URL activated, for the data flow from a survey in Questback Essentials.	To be defined in the **MIDDLE LAYER** on the customer side of the API that links the source/target system with a survey in Questback Essentials.
USE CASES	**AUTOMATED INVITATIONS** to a survey, via email or SMS. **AUTOMATED EXPORT** of raw data of a selected survey, to a folder on the server where the utility is installed.	**AUTOMATED INVITATIONS** to a survey, via email or SMS. **DIRECT FORWARDING** to a survey, from an external source system	**AUTOMATED EXPORT** of selected survey data, to an external target system (e.g. CRM), or to another survey in Questback Essentials.	**AUTOMATION INVITATIONS** to a survey, via email or SMS. **AUTOMATED EXPORT** of selected feedback or activity data to external target system (e.g. CRM).
EXECUTION	**PERIODICALLY** Files with selected data get generated in the source system and loaded to a folder for automated import, according to defined schedule (e.g. overnight). The same applies for scheduled raw data exports from a survey.	**REAL-TIME** Instant, with generation of invitation or direct forwarding of respondent to a survey, incl. selected data from source system.	**REAL-TIME** Instant, with forwarding of a respondent from one survey to another, or to an external target system, incl. selected feedback data	**REAL-TIME** or **PERIODICALLY** Automated data flow to Questback Essentials, with selected data from external source system, and/or from Questback Essentials to external target system, with selected feedback data.
REQUIRE MENTS	The customer has a **Windows** server to install the Integration Utility, and can generate files with invitees data for imports, or receive files with raw data exportd. The customer has feedback scenarios where periodic file-based import and/or exports are the preferred, with **no need for instant execution** of invitations/exports.	The customer has a source system that allows embedded survey URLs to capture and pass on data. The customer has feedback scenarios with the need for **instant execution**.	The customer has a target system that can process and store data received via parameters in a re-direction URL. The customer has feedback scenarios with the need **instand (CRM) updates.**	The customer has the capability to link their source and/or target system to the Questback API, with all necessary work to build and maintain the middle layer. The customer has feedback scenarios that require **flexible and extensive** ways for data to flow to/from Questback.

[EXAMPLE] Automate Survey Invitations (File-Based)

A	B	C	D	E
Email	Full Name	Company	Date	Sales Rep
dag.hasvold@questback.com	Dag Hasvold	Questback	01/11/2016	Tobias Rosenfeld

The files with all the data about the invitees need to stored in a pre-defined folder for the INTEGRATION UTILITY to find and process them:

| | Input | 31.10.2016 15:30 | File folder |
| | Processed | 31.10.2016 15:30 | File folder |

Once the files are processed and imported to Questback Essentials, the INTEGRATION UTILITY stores them in a separate folder.

Data flow to Questback Essentias with

INTEGRATION UTILITY
(file based import)

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Sales Pulse

Dear **Dag Hasvold**

Thank you for agreeing to complete this short survey with regard to your meeting on **01/11/2016** with our key account manager **Tobias Rosenfeld**.

We value your feedback and will use the results to improve our service to you and your company **Questback**.

Best regards

Nils Stangnes
SEVP Global Execution

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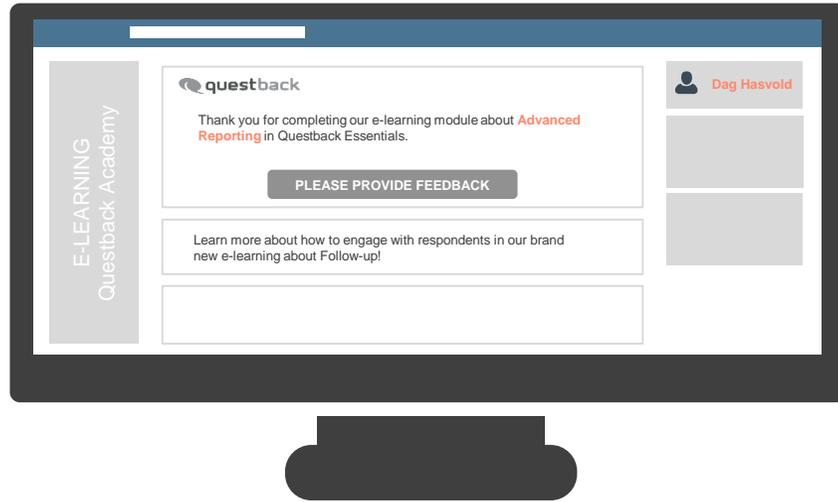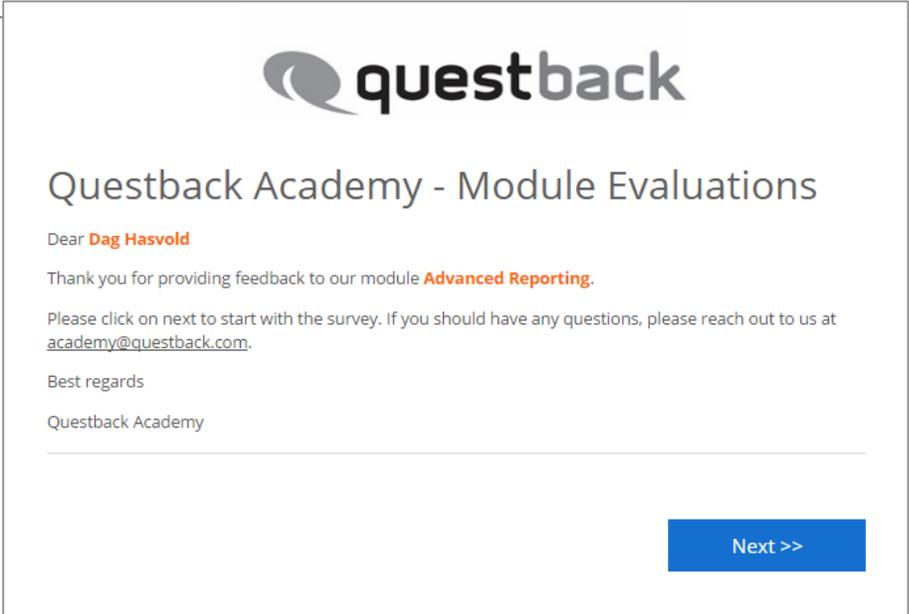| HOW DOES IT WORK	STRENGTHS	HOW TO GET STARTED	TYPICAL USE CASES
With "File-Based" import of invitees, the source system of the customers creates files with all relevant data about the invitees, and stores them in a pre-defined folder on their server. The INTEGRATION UTILITY installed on the customer server checks for new files in that folder in pre-defined intervals (e.g. once a day overnight, each hour or each week), and imports the file to a pre-defined survey in Questback Essentials, to generate invitations via email or SMS. Once the file is imported and processed, the INTEGRATION UTILITY stores the file in a separate folder.	The INTEGRATION UTILITY an easy-to-setup and low-threshold way to automate data flow to Questback Essentials. The INTEGRATION UTILITY does not require direct access to the data in the source system of the customer, and is often preferred by customers with strict security settings that rule out direct API integration. The customers can handle the file generation internally and completely disconnnected from Questback Essential, and only need to store the file in the pre-defined folder on their own server once they are generated.	1. Define the overall feedback scenario, and verify that the customer can create files and has a Windows server to install the INTEGRATION UTILITY . 2. Create the survey, define which data should be transferred to the survey. Prepare the filter structure and install the INTEGRATION UTILITY. 3. Test and verify the entire workflow. 4. Launch the the survey.	The INTEGRATION UTILITY is the solution of choice for all feedback scenarios where the customer system can generate files with invitees data, and can store the files on their server for the INTEGRATION UTILITY to pick them up and import them.

[EXAMPLE] Embed Feedback in Workflows

E-LEARNING
Questback Academy

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Thank you for completing our e-learning module about **Advanced Reporting** in Questback Essentials.

PLEASE PROVIDE FEEDBACK

Learn more about how to engage with respondents in our brand new e-learning about Follow-up!

Dag Hasvold

Data flow to Questback Essentials with

DYNAMIC LINKS

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Questback Academy - Module Evaluations

Dear **Dag Hasvold**

Thank you for providing feedback to our module **Advanced Reporting**.

Please click on next to start with the survey. If you should have any questions, please reach out to us at academy@questback.com.

Best regards

Questback Academy

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HOW DOES IT WORK

With Dynamic Links, one can embed a survey as part of a workflow in an external system, and capture and include data from that system as part of the survey response.

In the example above, a survey link is embedded behind the "Please provide feedback" button in an e-learning system, enhanced with two extra parameters to capture and include the following data:

- Name of the respondent (**Dag Hasvold**)
- Name of the module (**Advanced Reporting**)

STRENGTHS

Dynamic Links is an easy-to-setup and low-threshold way to automate data flow to a survey **in** Questback Essentials

The URL parameters used with Dynamic Links are a standard way of transferring data between IT systems, and does not require any Questback specific coding on the customer side.

HOW TO GET STARTED

1. Define the overall feedback scenario, with the survey and the trigger criteria in the source system.

2. Create the survey, define which data should be transferred from the source system to Questback Essentials, and prepare the survey URL with the respective parameters.

3. Test and verify the entire workflow.

4. Launch the survey, with the survey URL enhanced with the respective parameters.

OTHER TYPICAL USE CASES

Dynamic Links support all feedback scenarios where persons first work or are processed in a source system, and where they should get the offer to provide feedback as part of the workflow there.

Other typical use cases for an automated data flow to Questback Essentials include **touch-point tracking**, where respondents are offered to provide from a specific touch-point (website, point-of-sale, etc.) or feedback embedded in external **reservation/booking/CRM** systems.

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[EXAMPLE] Connect two Surveys for Sign-up Solution

Register your Sales Meetings

ABOUT THE MEETING
Please select the date of the meeting

01/11/2016

ABOUT THE PERSON
Please provide the relevant details about the person you had the sales meeting with:

* Name   Dag Hasvold
* Email   dag.hasvold@questback.com

ABOUT THE ORGANIZATION
Please provide the relevant details of the organization you had the meeting with

* Name   Questback
* Location (City) Oslo
* Country   Norway

ABOUT YOU
Please provide the relevant details

* Your name   Tobias Rosenfeld
* Your email tobias.rosenfeld@questback.com

Data flow from one survey to another survey in Questback Essentials with

QUESTION & ANSWER TAGS
and
DYNAMIC LINKS

questback

Sales Pulse

Dear **Dag Hasvold**

Thank you for agreeing to complete this short survey with regard to your meeting on **01/11/2016** with our key account manager **Tobias Rosenfeld**.

We value your feedback and will use the results to improve our service to you and your company **Questback**.

Best regards

Nils Stangnes
SEVP Global Execution

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HOW DOES IT WORK	STRENGTHS	HOW TO GET STARTED	OTHER TYPICAL USE CASES
Connecting two surveys for such a sign-up solution combines two elements: 1. Re-direction URL in the first sign-up survey, enhanced with Question & Answer Tags. 2. Dynamic Link in the second survey. The dynamic link of the second survey is defined as re-direction URL in the first survey, and enhanced with Question & Answer tags from the first survey, to pass on selected feedback from the first to the second survey. In this example: date of the meeting, name and organization of the meeting participant, and name of the sales person.	Such a combination of a re-direction URL and a Dynamic Link enhanced with Question & Answer Tag(s) is an easy-to-setup and low-threshold way to automate data flow between two surveys in Questback Essentials. Sign-up solutions like this one are straight-forward way to collect key data initially, and to include them in further feedback work. The Dynamic Link offering of Questback allows to invite respondents in addition to forwarding them directly to a survey, allowing to utilize all distribution functionality with reminders, quarantines, delays and distribution logs.	1. Define the overall feedback scenario. 2. Create the two surveys, define which data should be transferred from the first to the second survey, and prepare the survey URL with the respective parameters. 3. Test and verify the entire workflow. 4. Launch the two surveys, with the re-direction URL in the first survey being the dynamic link of the second survey, enhanced with the respective parameter and Question & Answer tags.	Connecting two surveys support wide range of sign-up scenarios, including: ▪ Education: sign-up for exams or evaluations. ▪ B2B: sign-up for ambassor programs, with upfront evaluations. ▪ VoC: registration of complaints, with indepth follow-up with a second survey. ▪ VoE: suggestion box, with indepth follow-up with a second survey. ▪ Etc. Sign-ups are end-to-end feedback solutions in Questback Essentials, and do not require external source or target systems.

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[EXAMPLE] Enhance CRM Data with Feedback

Customer Survey

How satisfied are you with …
1 = not at all and 6 = very much

	1	2	3	4	5	6
Service					●	
Product				●		
Sales					●	
R&D				●		

How likely is it that you would recommend Questback to a friend or colleague?

0 1 2 3 4 5 6 7 8 9 10

Data flow from Questback Essentias with

QUESTION & ANSWER TAGS

CRM

Customer A

Service Score: 5

NPS: 9

HOW DOES IT WORK

Upon completion of a survey, the respondents get forwarded to a re-direction URL, which is enhanced with Question & Answer Tags to include selected survey data.

The re-direction URL points to the CRM system of choice, and needs to be set up so that it can receive, process and store selected data to specific CRM fields.

The data flow happens from Questback Essentials to the CRM system happens as part of the re-direction.

STRENGTHS

The combination of a re-direction URL enhanced with Question & Answer Tags is an easy-to-setup and low-threshold way to automate data flow from Questback Essentials to an external target system.

The only requirement is that the CRM system supports such "receiving" URLs and that it can process and store data received via such URLs enhanced with extra parameters for the respective data fields.

HOW TO GET STARTED

1. Define the overall feedback scenario.

2. Create the survey, define which data should be transferred from the survey to the CRM system, and prepare the re-direction URL with the respective parameters and Question & Answer tags.

3. Test and verify the entire workflow.

4. Launch the the surveys.

OTHER TYPICAL USE CASES

Connecting a survey to a third-party system via re-direction URL supports wide range of scenarios, including:

- "Close-the-loop": external data received as input to a survey can be passed back to the same system, to close the loop, and register that feedback was store under a certain ID. Example include external panel databases, or embedded feedback with dynamic links.

- VoE: selected survey data from employee surveys are automatically added to the employee master file in the respective HR admin system.

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[EXAMPLE] Automate Data Flow with API Integration

1. HOW DOES IT WORK

"API Integration" is Questback's most **extensive and flexible integration offering**, allowing automated data flow from any source system, and to any target system that supports data flow via our **WebServices API**.

Questback provides **extensive technical documentation** about its API and all supported integration calls, and makes sure that Questback Essentials is linked to the API. **The customers on the other hand need to take care of "their side" of the API**, and link their source and/or target system themselves to the API. This work might often require some level of coding at the customer side, either in-house or with external assistance with experience in this field.

TRIGGER(s) for the data flow to be initiated are to be defined in **middle layer on the customer side of the API** that links the **source/target system** with Questback Essentials.

2. TYPICAL USE CASES

Typical use cases of an "API Integration" include all cases where customers wish a **deep and close integration** of their source/target system with Questback Essentials, and where the other integration options are not applicable or do not offer enough flexibility.

"API Integration" is typically used for more **complex feedback scenarios**, where a lot of data is to be transferred to and from a survey in Questback Essentials, and where the customer would like to have full flexibility to define the triggers for the data flow in their own middle layer.

"API Integration" also allows automated data flows that go beyond automated invitation processes and data updates in target system. The integration library includes calls to review and see the status of surveys in Questback Essentials.

3. STRENGTHS

"API Integration" is Questback's most **extensive and flexible integration offering**, allowing extensive automated data flow from any source system, and to any target system that supports data flow via our **WebServices API**.

The customers have **full flexibility to build and customize** the integration according to their needs, based on the extensive list of integration calls that we support in the integration library.

Questback has a **proven track record** of successful integrations with 100+ customers in different countries, working with API integration and data flow back and forth and to and from Questback Essentials on a daily basis.

4. HOW TO GET STARTED

As with any integration project that includes automated data flow between different IT systems, also the work with "API Integration" and Questback Essentials starts on the drawing board with scetching out the overall feedback scenario first:

- Which data from which source system should flow to which survey in Questback Essentials, based on which triggers and in which form, and ...

- Which data should then flow back from Questback Essentials to which target system and add/create/update which data records there.

Questback's professional services and customer success teams will work closely with our customers, and assist in all stages of projects with "API Integration".