

### Engagement is Easier with Our Qualtrics Integration

Reward Qualtrics respondents easily with Virtual Incentives. You can now simplify incentive payouts and instantly send incentives upon survey completion. Choose from brands including Amazon, Visa & 1050+ global egiftcards.



### 4 Things You Should Know



Use Virtual Incentives to add your customized rewards to your Qualtrics survey.



Increase your survey participation and response rates by providing recipients with instant rewards.



Eliminate the need for recipients to share personally identifiable information.



Implementation in your surveys is quick and easy.

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Respondents are the lifeblood of research, and Virtual Incentives delivers the best possible platform to keep them engaged and happy with relevant incentive options on a global scale."

Leonard Murphy EDITOR IN CHIEF, GREENBOOK



### **Get Started**

virtualincentives.com/integr ation/qualtrics +1-646-736-1910



The Virtual Incentives Extension is a code that allows reward integration into a qualtrics survey to simplify incentive payouts. The parameters on how to integrate Virtual Incentives digital rewards are shown below.

#### Installing the VI extension

Log into Qualtrics XM, select admin extensions & select Virtual Incentives - install.

Reports Users User Types Groups Group Types Coupon Codes Security Data Pri	rivacy Usage tags Themes Organization Settings Divisions 2
Extensions	Q Search
All exercisions cullently added in this orand.	

### **Connecting to VI credentials**

Clients will receive API credentials from Virtual Incentives that consist of client account name, username and password. Follow the steps below after the VI extension has been installed.

Step 1:

XM	Projects Directories Actions Library Admin Help 🌲 😩
Reports Users User Types Groups Group Types Coupon Codes Security Data Privacy	Usage tags Themes Organization Settings Divisions Extensions
Extensions All extensions currently added in this brand Click here	Q Search
Virtual Incentives By Virtual Incentives Version 1.0.1	>

Step 2:

XM							F	Projects	Directories	Actions	Library	Admin	Help	۰	٢
Reports Use	ers User Types	Groups	Group Types	Coupon Codes	Security	Data Privacy	Usage tags	Themes	Organiza	ation Settings	Division	s Exte	nsions		
← Back															
Virtual	Incentives														
Details			Global acco	ounts											
Created by Version	Virtual Incentives 1.0.1			2								click h	ere		
Terms and Condit Privacy Policy	tions		Setup accour	nts that can be used	by other Qua	Itrics users.					De	lete Selecte	ed 4	dd Acc	ount



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Step 3: Enter the VI API credentials on this screen to connect the client account to the VI extension on Qualtrics. Once the VI extension is connected on Qualtrics you can now use it on surveys created under the projects tab in Qualtrics XM.

Name	1	
This name will only be used inte	matly to refer to this account	
Username	2	
Password	3	
		4

### **Building the survey**

Create your survey as you normally do on qualtrics. Identify if screened and completed respondents will be rewarded. Setup rewards with Virtual Incentives and gather the reward information such as program\_id, sku and amount. Additional information can be accessed from embedded data or contact list or metadata. Once the survey is programmed and tested, you can set the VI task from the actions tab.

### Creating an action in a survey

After a survey is programmed and tested, the action tab has to be set up for a rewards task. This task can be *direct* or *conditional*. A direct task will be enforced after a survey response is recorded on Qualtrics. A conditional response will ensure the task is executed only if a criteria based on survey question response or panel data points or other sample data is met. To editing an action, follow the steps to add an action, create an event and perform a task.

Step 1: Select the Actions tab on the menu bar.

Survey Actions Distributions Data & Analysis Reports	
Editor Reporting	3
	+ Add Action
4	Scheduled
	Event-based



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Step 2: Choose the event and select the survey response type of action.



Step 3: Select when this action should take place. Typically we want this to happen when a survey response is created.

New Action(1)	0 Tasks	
Select what starts the action Change	What do you want to look for?	
Survey response Someone responded to TestVIUseCase1	Response created     Response updated	
Perform the following	← Back	Cancel Finish
+ Add conditions + Add Task		

Step 4: At this step you can add a direct VI task by selecting Add Task.





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Step 5: Add task opens a task panel as shown below. Select the Virtual Incentives task.

	Tickets By Qualtrics	Email By Qualtrics	Web Service	XM Directory
Select what star	Create a ticket in Qualtrics	Send an email	Make a request to an external API.	Add contact info or distribute a survey.
Perform the foll	₹ 🕑 📍	٥ ب	•	<b>^</b>
+ Add condit	Virtual Incentives	Notifications	Update Ticket Task	Load data into XM
	Deliver Digital Rewards to Survey Participants	Create a new desktop and mobile notification	Update an existing ticket.	By Qualtrics Map your directory data from a

Step 6: Select the account that was set up in step 3 of connecting to VI credentials.

New Action(1)		0 Tasks	
(	Choose account		Add user account
Select what sta	Account name	Connection type Owner	
Someon	Mithila Nadkarni	Basic Me	*
Perform the foll			
+ Add condit			13
New Action			Cancel Next

Step 7: Your VI task is added in your action tab. Perform Step 8-9 if you want to add a condition that needs to be fulfilled to generate a reward, otherwise skip to configuring VI information.

New Action	1 Tasks 火	4		1	Ŭ
Select what starts the action Change					
Survey response Someone responded to TestVIUseCase1			Edit		
Perform the following					
+ Add conditions					
Virtual Incentives Deliver Digital Rewards to Survey Participants		т1 .			



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Step 8: Select Add conditions to open a condition builder.



Step 9: Conditions can be built using questions, embedded data, contact list data, panel data and reserved metadata. You can add multiple conditions. Follow the steps shown below to build the condition based on the survey question and click **Done Editing**.



Based on the example above VI rewards task will be performed only if at Q2 respondent answered "Yes".



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### **Configuring VI information**

Information is grouped in three categories: Reward, Respondent and User Defined Fields (UDF's). All required fields have an asterisk (\*) notation.

**Reward Information**: All information on this "Reward Information" screen is required. The Client ID has to be unique. Besides reserved metadata SurveyID and ResponseID, you can append unique fields such as PaneIID or SampleID.

Vi Reward				
Provide configur	ation options for	the rewa	ard you want to ser	nd to your respondents
Reward Infor	mation			
				provide a unique identifier for this reward
	Client ID	*	\${rm://Field/Survey	ID}_\${rm://Field/ResponseID} { a }
Pr	ogram ID	*	50356	{a}
	cl	*	11001/171	provide the VI product sku for this reward
	SKU		UGC-V-AZI	{a}
	Amount	*	1.00	

**Respondent Information**: The next set of variables make up the respondent information. Email, First Name and Last Name are required fields. These variables can be mapped from panel, contact list, meta data or embedded data source. Or, if there are changes to the values other than what's defaulted they can be overridden manually. All other fields are optional.

Email	*	provide a	a variable that passes first na	me	{a}	Click to
First Name	*	provide	a variable that passes last r	ame	{a}	data so such a panel
Last Name	*	/			{a}	list, me or emb
Address 1	~				{a}	
Address 2	~				{a}	-
City	~				{a}	Ā



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#### **Configuring VI information**

**User Defined Fields**: In addition to the rewards and respondent information additional udf's have been built to pass information the client deems fit to pass to the VI task. Please follow GDPR guidelines when passing additional information through the UDF's. All UDF's are optional. The image below shows UDF 1-3 used to pass embedded information.

User Defined Fields	(	Optional fields available to client	to pass any additional data variables	
User Defined 1	~		{a}	-
User Defined 2	~		{a}	-
User Defined 3	~		{a}	-
+ ~				
< Back			Ca	incel

**Example below:** Passing information to VI tasks can be from multiple sources in Qualtrics. Information can be text, reserved metadata, contact list, embedded data, panel data etc.

Reward Information	- one revial	d you want to send to your responden	11.5						
reserved metadata									
Client ID	*	\${rm://Field/SurveyID}_\${rm://Field/Respon	nseID}_\${e://Field/SampleID}	{a} Source					
Program ID	*	50356 (text data)		A					
Sku	*	UGC-V-AZ1	Pipe text from a						
Amount	*	1.00	Survey Question	>					
			GeoIP Location	>					
annousiant Information	ſ	Question response da	ata DateTime	>					
Respondent Information	C	Question response da	DateTime Panel Field	> >					
Respondent Information		Question response da \${q://QID33/ChoiceTextEntryValue/3}	DateTime Panel Field Quota	> > >					
Email First Name	( * *	Question response da \${q://QID33/ChoiceTextEntryValue/3} \${m://FirstName}	Date Time Panel Field Quota Response Status	> > >					
Email First Name	( 	Question response da \$(q://QID33/ChoiceTextEntryValue/3) \$(m://FirstName} \$(m://LastName)	DateTime Panel Field Quota Response Status	> > > {a}					
Respondent Information Email First Name Last Name + ~	* * *	Question response da \$(q://QID33/ChoiceTextEntryValue/3) \$(m://FirstName) \$(m://LastName) Panel data	DateTime Panel Field Quota Response Status	> > > (a)					
Respondent Information Email First Name Last Name + ~		Question response da \$(q://QID33/ChoiceTextEntryValue/3) \$(m://FirstName) \$(m://LastName) Panel data	DateTime Panel Field Quota Response Status	> > > (a)					
Respondent Information          Email         First Name         Last Name         + ~         User Defined Fields	( ` `	Question response da \$(q://QID33/ChoiceTextEntryValue/3) \$(m://FirstName) \$(m://LastName) Panel data embedded	DateTime Panel Field Quota Response Status	> > > (a)					
Respondent Information          Email         First Name         Last Name         + ~         Jser Defined Fields         User Defined 1		Question response da s(q://0ID33/ChoiceTextEntryValue/3) s(m://FirstName) s(m://LastName) Panel data embedded s(e://Field/RefID)	DateTime Panel Field Quota Response Status	(a)					



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### **Reporting an Action**

Once the reward information is set up on VI task, survey is launched and data collections begins. Use the Actions -Reporting tab to check on the status of a completed record.

Survey Actions Data & Ana	alysis Reports			
Editor Reporting Status: All ~ Action: All ~ Tasks: A	ll v	Until	Q Search Event ID.	
Action Name	What start:	ts the action	ction	
New Action New Action	Survi	Survey response (TestVIUseCase2): response created  Survey response (TestVIUseCase2): response created  Survey response (TestVIUseCase2): response created		

**View #4** below shows the data capture details sent to the Virtual Incentives API. Client programmer can use this for debugging.



The Virtual Incentives Extension is a seamless task that enhances with survey respondents experience. At the end of the respondents receive an email with a link to redeem their digital reward.