



# SurveyMethods

Step by step tutorial demonstrating launching of a survey  
remotely using the API

# Introduction

The following presentation describes how to launch a survey remotely using the API included in the SurveyMethods REST API.

There are two types of programming languages which you can use to integrate with SurveyMethods and execute the “Launch a Survey Remotely” API:

1. HTML
2. JavaScript/Jquery

In this presentation, the execution of this API is explained using **HTML**.

# Steps for Integration



**1. Generate an API key**



**2. Trigger a Remote Activation request with an HTML form**



**3. SurveyMethods Processes the Following: API request, Launching of a Survey, and Sending Invitation(s)**



**4. Test the Integration**



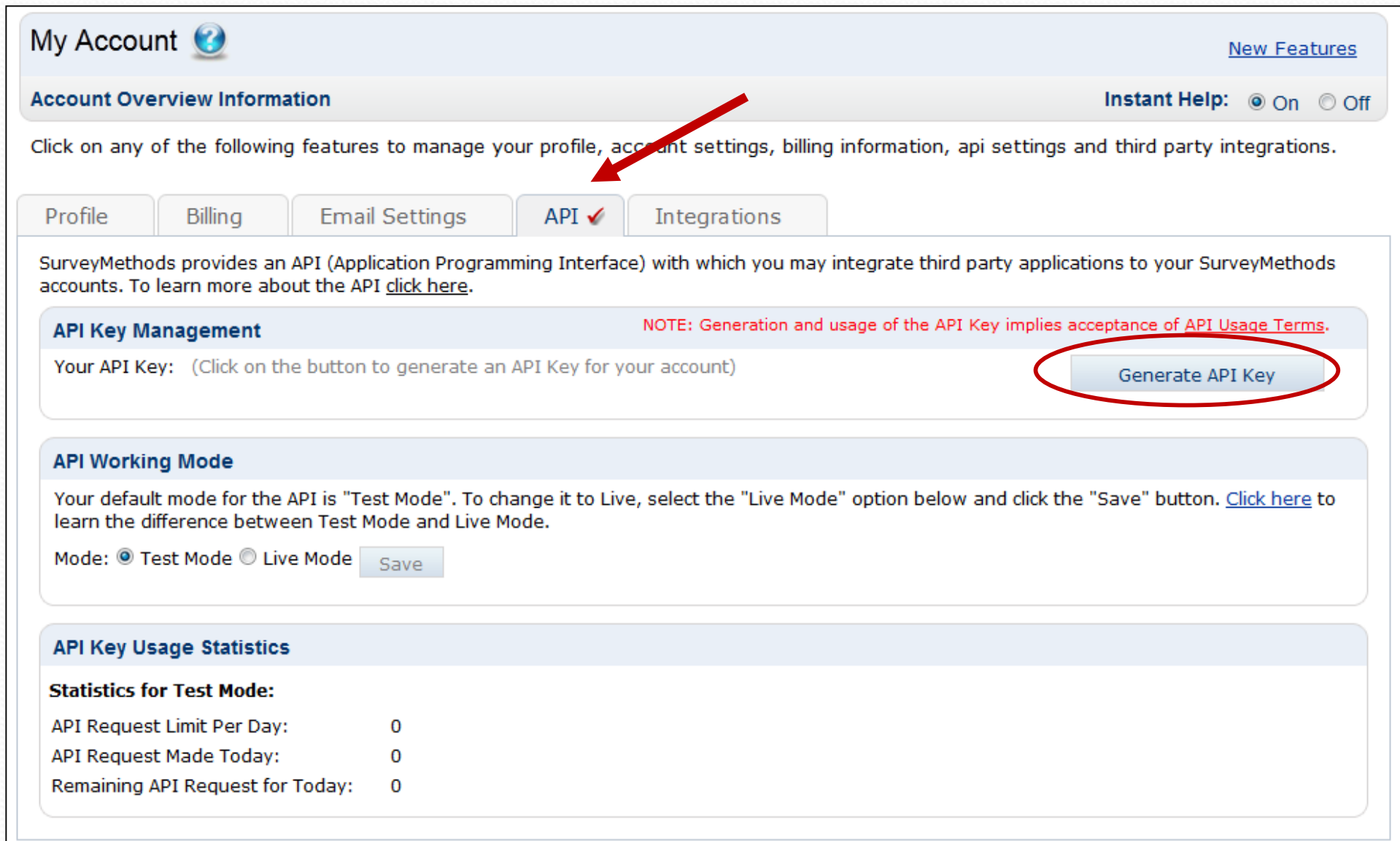
**5. View the API Usage Statistics & Activity Reports**



**6. Change the API mode from Test to Live**

# Step 1: Generate an API Key

- Login to your SurveyMethods account.
- Go to the “My Account” page.
- Click on the “API” tab.
- Copy your API key displayed or generate your API key by clicking on the “Generate API Key” button.



The screenshot shows the 'My Account' page with the 'API' tab selected. A red arrow points to the 'API' tab, and a red circle highlights the 'Generate API Key' button. The page includes sections for API Key Management, API Working Mode, and API Key Usage Statistics.

**My Account** [New Features](#)

**Account Overview Information** **Instant Help:** ☒ On ☐ Off

Click on any of the following features to manage your profile, account settings, billing information, api settings and third party integrations.

Profile Billing Email Settings **API** ✓ Integrations

SurveyMethods provides an API (Application Programming Interface) with which you may integrate third party applications to your SurveyMethods accounts. To learn more about the API [click here](#).

**API Key Management** NOTE: Generation and usage of the API Key implies acceptance of [API Usage Terms](#).

Your API Key: (Click on the button to generate an API Key for your account) **Generate API Key**

**API Working Mode**

Your default mode for the API is "Test Mode". To change it to Live, select the "Live Mode" option below and click the "Save" button. [Click here](#) to learn the difference between Test Mode and Live Mode.

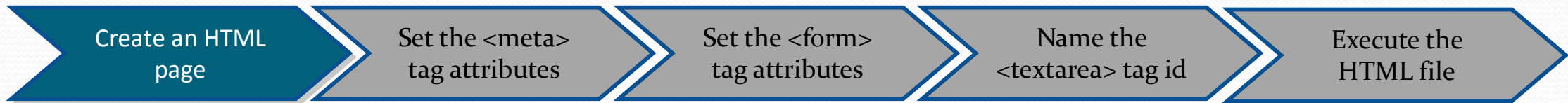
Mode: ☒ Test Mode ☐ Live Mode **Save**

**API Key Usage Statistics**

**Statistics for Test Mode:**

API Request Limit Per Day:	0
API Request Made Today:	0
Remaining API Request for Today:	0

## Step 2: Trigger a Remote Activation request with an HTML form

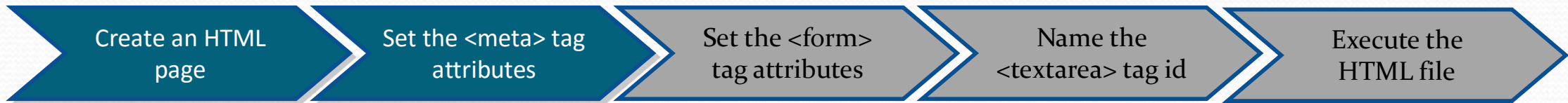


Create an HTML page containing the following elements:

- Form
- Textarea

```
<html>
<head>
  <title></title>
</head>
<body>
  <form>
    <textarea></textarea>
    <input type="submit" value="Submit" />
  </form>
</body>
</html>
```

## Step 2: Trigger a Remote Activation request with an HTML form

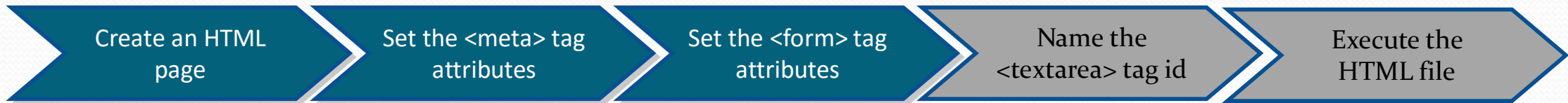


Set the <meta> tag attributes:

- **http-equiv**="Content-Type"
- **content**="application/x-www-form-urlencoded; charset=UTF-8"

```
<html>
<head>
  <title></title>
  <meta http-equiv="Content-Type" content="application/x-www-form-urlencoded;
charset=UTF-8" />
</head>
<body>
  <form>
    <textarea></textarea>
    <input type="submit" value="Submit" />
  </form>
</html>
```

## Step 2: Trigger a Remote Activation request with an HTML form

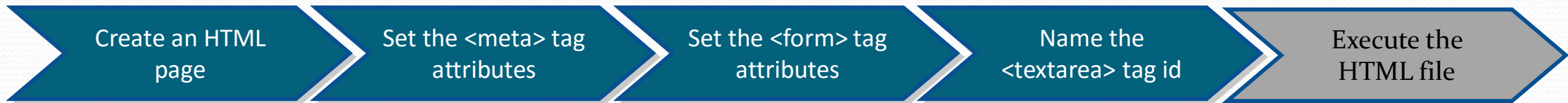


Set the <form> tag attributes:

- **method**="POST"
- **action**= "https://api.surveymethods.com/v1/{ login\_id }/{api\_key} /surveys/{survey\_code}/remotelaunch/"

```
<html>
<head>
  <title></title>
  <meta http-equiv="Content-Type" content="application/x-www-form-urlencoded;
charset=UTF-8"/>
</head>
<body>
  <form id="frmAPIPost" method="post"
action="https://api.surveymethods.com/v1/myloginid@mydomainname.com/ldbnATfDu8Vv2g7
F1HztIQ/surveys/1A05B2RSA7QTSYHB/remotelaunch/">
    <textarea></textarea>
    <input type="submit" value="Submit" />
  </form>
</body>
</html>
```

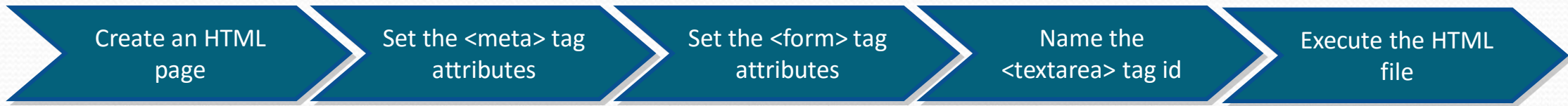
## Step 2: Trigger a Remote Activation request with an HTML form



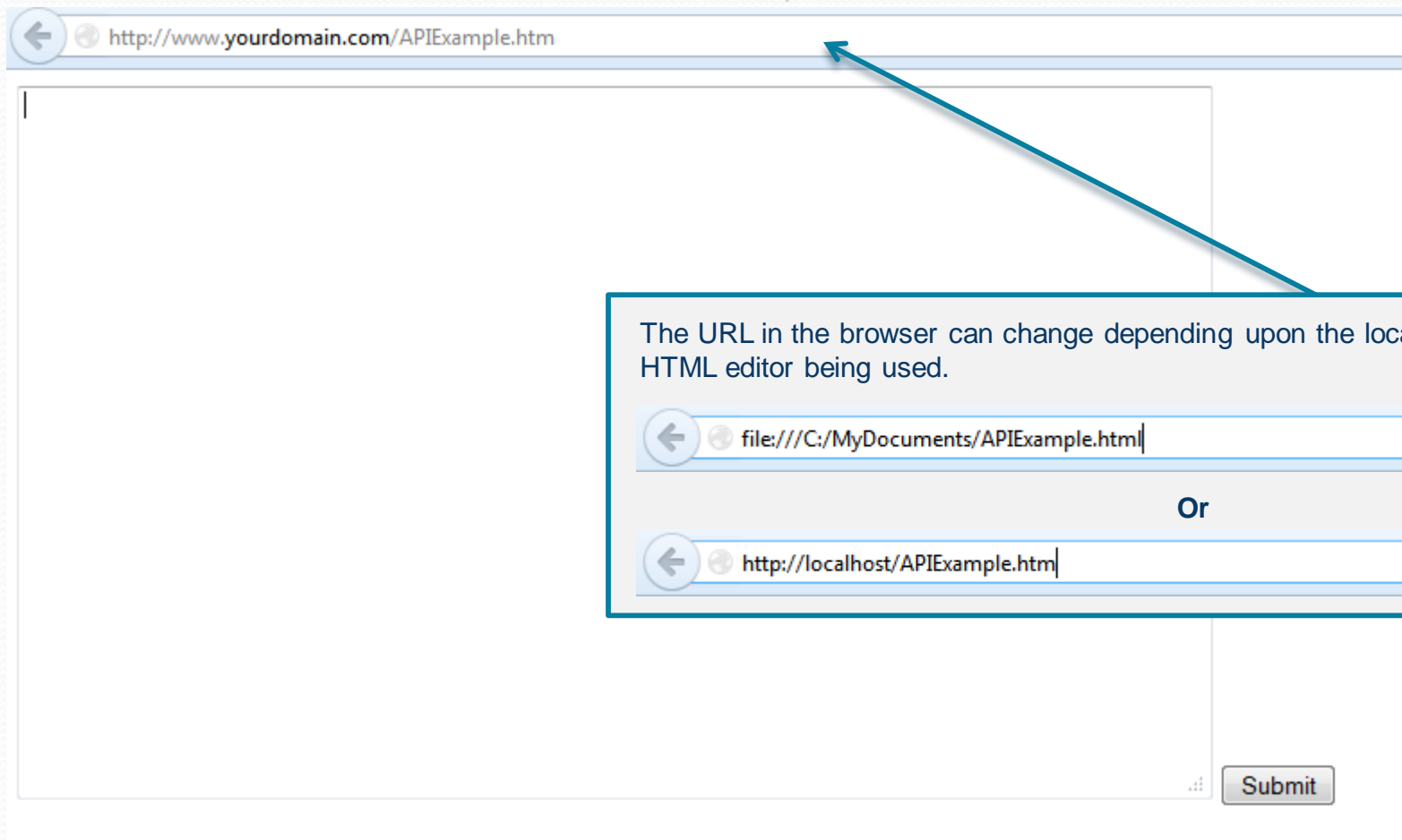
Set the value for id of the <textarea> tag as "RAContent"

```
<html>
<head>
  <title></title>
  <meta http-equiv="Content-Type" content="application/x-www-form-urlencoded;
charset=UTF-8" />
</head>
<body>
  <form id="frmAPIPost" method="post"
action="https://api.surveymethods.com/v1/myloginid@mydomainname.com/ldbnATfDu8Vv2g7
F1HztIQ/surveys/1A05B2RSA7QTSYHB/remotelaunch/">
    <textarea id="RAContent" name="RAContent" rows="25" cols="80"></textarea>
    <input type="submit" value="Submit"/>
  </form>
</body>
</html>
```

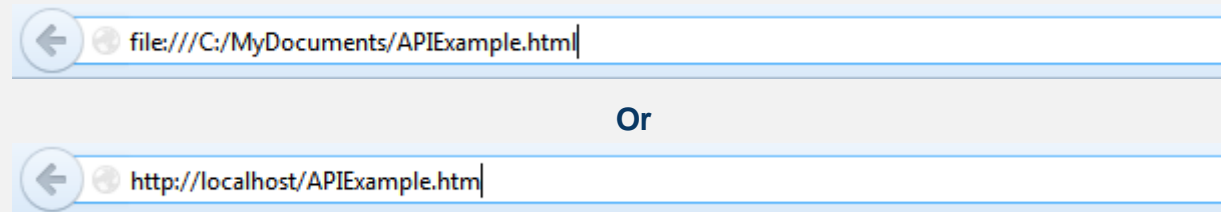
## Step 2: Trigger a Remote Activation request with an HTML form



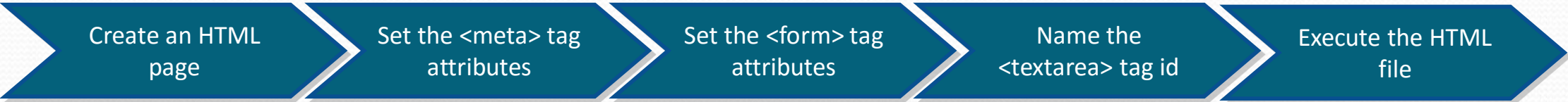
Execute this HTML file by opening it in a browser. The output will be displayed as a text area along with a “Submit” button.



The URL in the browser can change depending upon the location of the HTML file and the HTML editor being used.



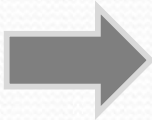
# Step 2: Trigger a Remote Activation request with an HTML form



Enter the remote activation request in the text area in the format as shown on the left hand side below. The **labels** must be specified in the same format as shown. Replace the dummy values of the labels with actual ones:

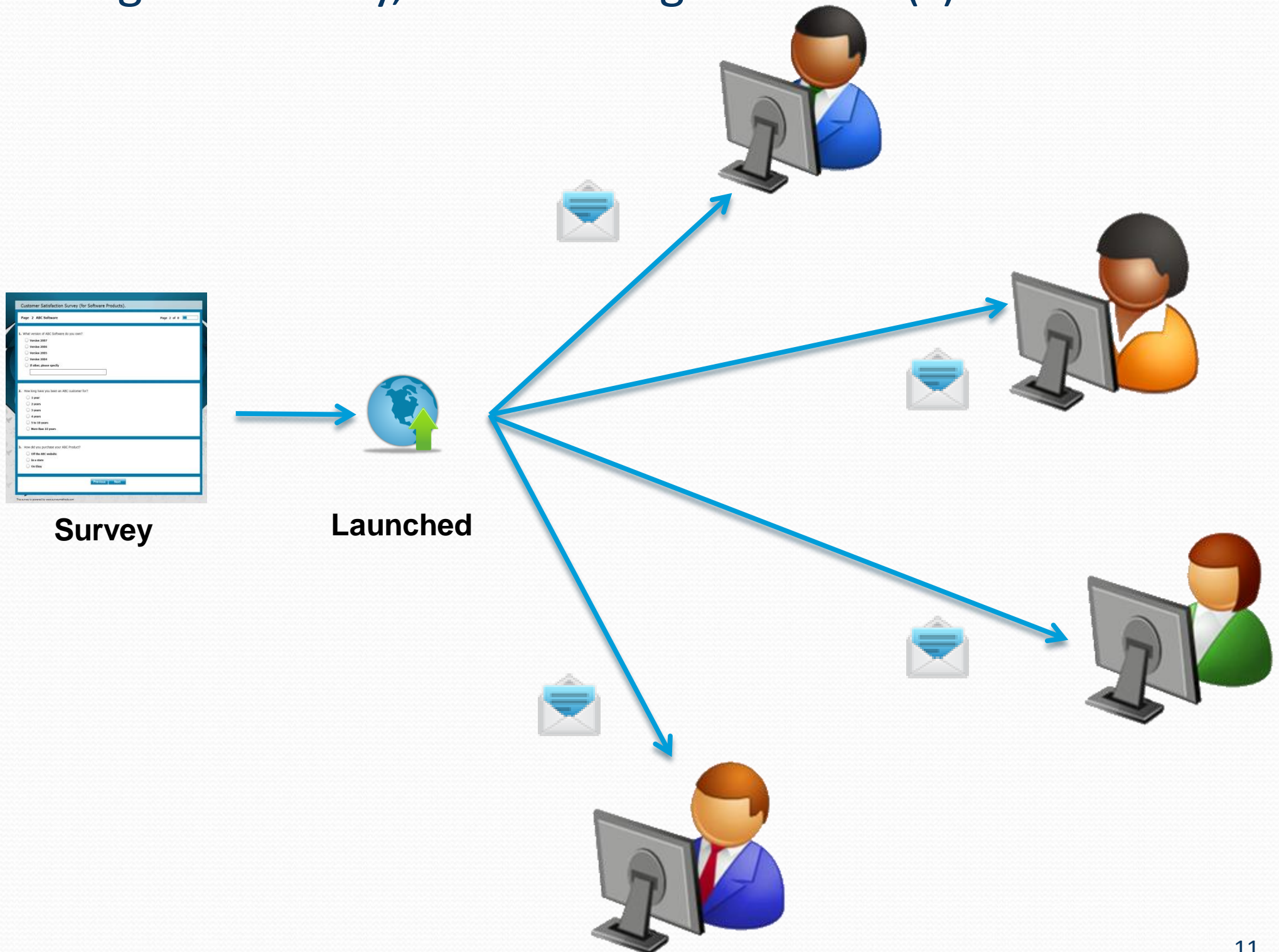


```
[SenderId]sender@gmail.com
[LoginId]smuser@gmail.com
[SurveyCode]ABCDEFGHIJKLM
[SendtoStart]
firstuser@gmail.com,categoryvalue1,categoryvalue2,
categoryvalue3,categoryvalue4, categoryvalue5;
seconduser@gmail.com,categoryvalue1,categoryvalu
e2,categoryvalue3,categoryvalue4, categoryvalue5;
[SendtoEnd]
[Categoryvalue1]Name
[Categoryvalue2]Company
[Categoryvalue3]Incident ID
[Categoryvalue4]Office
[Categoryvalue5]Service Representative
[EOF]
```



Label	Meaning
[SenderId]	Email Address of Remote Launch request initiator or Request Sender user.
[LoginId]	Email Address of registered user with SurveyMethods.
[SurveyCode]	Survey code of the survey linked with [LoginId] for which survey remote activation is to be triggered.
[SendtoStart] & [SendtoEnd]	Comma separated list of recipient email addresses to which the survey will be launched, and custom field values in a predefined format.
[Categoryvalue1] to [Categoryvalue5]	Name of the custom fields.
[EOF]	Defines the end of Remote Activation input.

## Step 3: SurveyMethods Processes the Following: API request, Launching of a Survey, and Sending Invitation(s)



## Step 4: Test the Integration

- In this step you need to test for the following points:
  - ✓ Successful integration of your application with SurveyMethods with the use of the REST API.
  - ✓ After executing the function call, ensure all your recipients have received the survey invitation email and they are able to take the survey.
  - ✓ After your recipients have taken the survey, ensure that their responses are shown in the Analyze section.

For help with getting your API to work, please [click here](#) to contact our support team.

# Step 5: View the API Usage Statistics & Activity Reports

- Go to the [My Account Page](#) and API tab to view the API requests usage limits and statistics.

API Key Usage Statistics	
<b>Statistics for Live Mode:</b>	
API Request Limit Per Day:	15
API Requests Made Today:	5
Remaining API Requests for Today:	10

- Go to the [Survey Settings Page](#) to view the [Survey Remote Launch Activity](#) report.

**Survey Communication Properties**

[View/Edit Survey Web Greeting Options](#)  
[View/Edit Survey Completion Options](#)  
[View/Edit Survey Invitation Email](#) (if you launch the survey by email)  
[Setup Automatic Reminders](#)  
[Receive Survey Results Via Email](#) NEW

**Publish Survey Results Onto the Internet**

[Publish Survey Results Settings](#)

**Navigation and Numbering**

[Edit Navigation and Numbering Properties](#)

**Trigger Your Survey Remotely from your ERP or CRM Systems:**

**Remote Survey Launch Using Email:**  
Configure your application to launch a survey from your SurveyMethods account using the code specified. [Click here](#) for more details.

**Remote Survey Launch Using SurveyMethods API:**  
Integrate your application with SurveyMethods to launch your survey remotely using our API and the code specified.  
[API Key Management](#)

**Survey Code:** 1A05B2RSA7QTSYHB

**Survey Remote Launch Activity Report:**  
[Click here](#) to view your survey remote launch activity report.

**Web Deployment Options**

[Additional Survey Distribution Methods](#) ( Facebook, Twitter, etc. )

**Survey Web URL:**  
Your survey may be taken by accessing the following URL:  
<http://surveymethods.com/EndUser.aspx?B631QCTH1JRS1ERT3>  
[Click here](#) to learn more about using the differences between launching surveys through a Web URL vs. email

**Survey Settings - Survey Remote Launch Report** New Features

**Customer Satisfaction Survey** Instant Help: ☒ On ☐ Off

View the activity report for your survey remote launch activity. Select the start date and the end date for which you want to view the survey remote launch activity report. All fields with an asterisk (\*) are required.

**Survey Remote Launch Details**

**Survey Code:** 1A05B2RSA7QTSYHB

**From Date: \*** 02/19/2013

**To Date: \*** 02/19/2013

[Back](#) [Submit](#)

**Activity Summary - For All Remote Launch Requests**

Total Remote Launch Request:	18	Total Opted Out Recipients:	20
Total Email Recipients:	85	Total Failed Emails:	65
Total Email Invitations Sent:	0		


No. of Remote Launch Request	Executed On	No. of Email Recipients in this Remote Launch Request	No. of Email Invitations Sent	No. of Recipients Opted Out	No. of Failed Emails
18	02/19/2013 01:25:00 AM	15	0	0	15
17	02/19/2013 01:20:01 AM	2	0	1	1
16	02/19/2013 01:20:00 AM	2	0	1	1
15	02/19/2013 01:15:01 AM	2	0	0	2
14	02/19/2013 01:05:00 AM	4	0	3	1
13	02/19/2013 01:00:01 AM	4	0	1	3
12	02/19/2013 01:00:01 AM	4	0	1	3
11	02/19/2013 00:55:00 AM	2	0	0	2
10	02/19/2013 00:50:01 AM	6	0	6	0
9	02/19/2013 00:45:01 AM	4	0	0	4

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# Step 6: Change the API mode from Test to Live

- After you have tested the integration, switch the API working mode to “Live Mode”.

My Account 

New Features

Account Overview Information


Instant Help: ☒ On ☐ Off

Select the appropriate tab to view or edit your account information.

Profile

Billing

Email Settings

API 

Users

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API Key Management

NOTE: Generation and usage of the API Key implies acceptance of [API Usage Terms](#).

Your API Key: (Click on the button to generate an API Key for your account)

Generate API Key

API Working Mode

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Mode: ☒ Test Mode ☐ Live Mode 

Save

API Key Usage Statistics

Statistics for Test Mode:

API Request Limit Per Day:	30
API Request Made Today:	0
Remaining API Request for Today:	30