Set Up Your Own Panel Integration

Do you need to purchase responses to your survey that are targeted to age, gender, region, and other demographic attributes? No problem, Alchemer's Survey Audiences allow you to target people with specific demographics easily via the Alchemer **Share** tab.

Alchemer is happy to help you with purchasing panel responses, but if you prefer to go it alone, you can use almost any panel company to purchase survey responses. Panel companies match their pool of respondents against your targeted needs for a per-response fee.

Understanding the Alchemer Features Used in Panel Integrations

Because there are so many moving pieces to a panel integration there are numerous steps to follow. You might find it useful to read through the below features and their respective tutorials so that you understand the steps below.

- **URL Variables** - Panel companies will use at least one URL variable (Panel ID) in order to send information to and receive information from your survey. It's a great idea to get familiar with URL variables before setting up your panel integration; check out our Using URL Variables to Pass Data Tutorial to learn more!
- **URL Redirects** - You will be setting up a redirect on the Thank You page of your survey to notify the panel company that a given respondent has completed their survey. As part of the redirect, you will need to send along some information so the panel company can identify which specific panelist completed the survey; check out our Send Values Through the URL Redirect Action Tutorial to get more familiar with how this works.
- **Hidden Values** - You will be setting up a Hidden Value to store the Panel ID URL variable. Check out our Storing and Using Hidden Values Tutorial to learn more before getting started with your panel integration setup.
- **Disqualify Logic** - For some surveys you may include disqualifying/screening questions in your survey to further refine your respondents. If you have a disqualifying/screening question or questions in your survey, check out our Set Up Disqualify Logic Tutorial to learn more before getting started with your panel integration setup.
- **Quotas** - You will be setting up a quota to make sure you collect the necessary amount of responses (and not more). Check our Survey Quotas Tutorial to learn more before getting started with your panel integration setup.

Need help finding a respondent pool? Let our Professional Audience Services team find your target audience and integrate your survey to collect the data you need!

Step 1: Get Your URLs and Identify Your Panel ID

After you have purchased respondents, your panel company will provide you with 3 URLs (links) that you will use to redirect respondents back to the panel company site. Each URL is used for a different scenario:

1. URL for redirecting respondents to the panel company when they *complete* a survey
2. URL for redirecting respondents to the panel company when you the survey is *over quota* (the number of responses you have purchased)
3. URL for redirecting *disqualified respondents* who don't meet certain criteria (this doesn't always apply)

Once you have your URLs, before you get started setting up your panel integration be sure to ***identify your panel ID.***

This ID is often included at the end of the URLs that the panel company gives you. It is used by the panel company to track respondents. The name of the variable, the **uid** portion in the example URL below, will vary by panel company, but it typically has **id** somewhere in it. It will look something like this at the end of each of your URLs:

> http://yourfriendlypanelco.com/completes?**uid**=xxxxxx

If you are having trouble identifying your Panel ID, ask your panel company to help you or reach out to our Support Team. It is important to make sure you know what your panel ID is before you get started!

> *Alchemer does not support "_" (underscore) at the beginning of a URL variable, such as "_uid". Please be sure to ask your panel company to provide you with a URL variable without a leading underscore. Similarly, it is best to use lower case letters instead of upper case.*

We will be using the following example URLs. Our Panel ID variable for this example is **uid** (which stands for user identification).

http://yourfriendlypanelco.com/**completes**?uid=xxxxxx
http://yourfriendlypanelco.com/**fullquota?**uid=xxxxxx
http://yourfriendlypanelco.com/**disqualified**?uid=xxxxxx*

*This link might also say something like "earlyscreenout" at the end

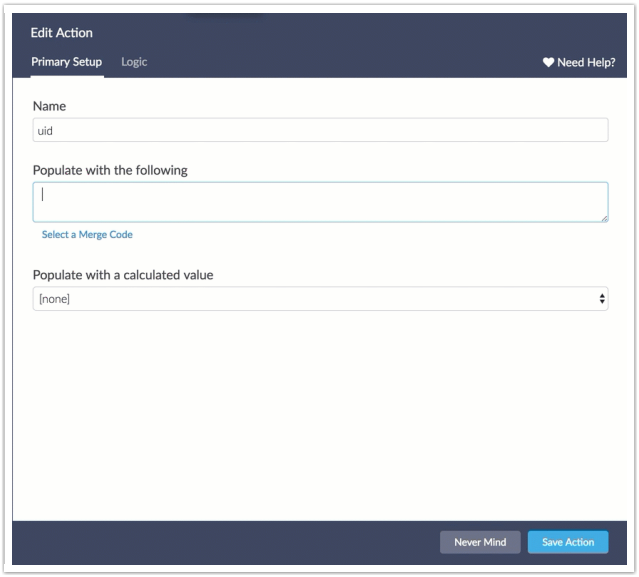
Step 2: Store Respondents' Panel IDs

Once you have your URLs and have identified your Panel ID, you're ready to jump in and get started adding the integration pieces to your survey. To start, you will set up a Hidden Value to capture the ID variable at the end of the links that the panel company provides.

1. Click **Add Action** on the first page of your survey, select **Hidden Value**.
2. In the **Populate with the following** field, click **Select a Merge Code** and choose **URL Variable** from the **About the respondent** section of the menu.
3. Click the **Insert** button, it will populate the field with this: **[url("xxx")]**.
4. Replace the **xxx** between the quotes with your Panel ID. In our example it is **uid** so our URL Variable merge code will look like so when we are finished:

   ```
   [url("uid")]
   ```

5. Once it looks correct, click **Save Action.**

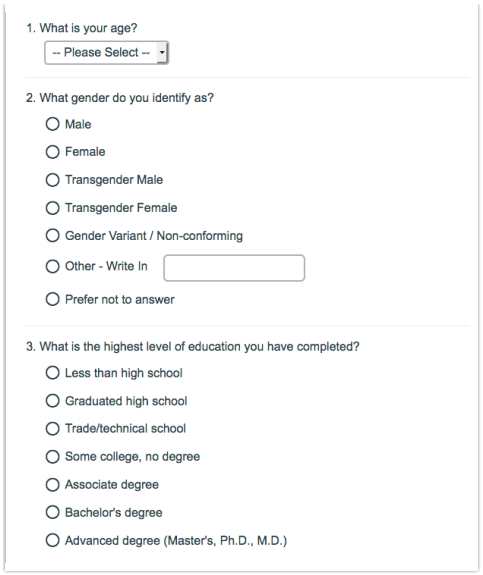


Step 3: Set Up Screening Questions and Disqualify Logic

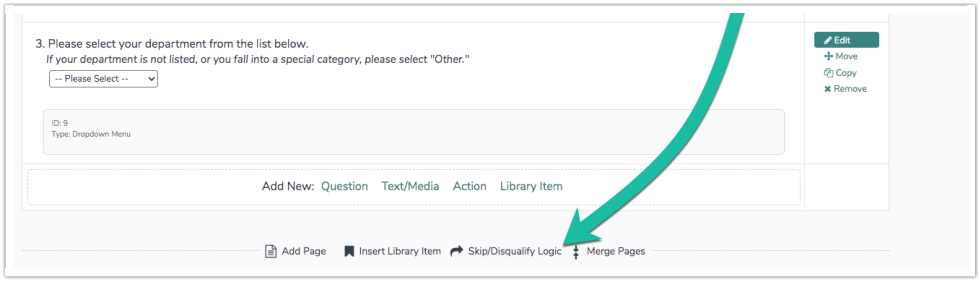
It is always a good idea to set up screening questions that verify that your respondents meet the demographic requirements that you requested from your panel company. Follow the below steps to set this up!

The below method is a good option if you have a few screening questions. If you have a large amount of screening questions, consider this alternative solution.

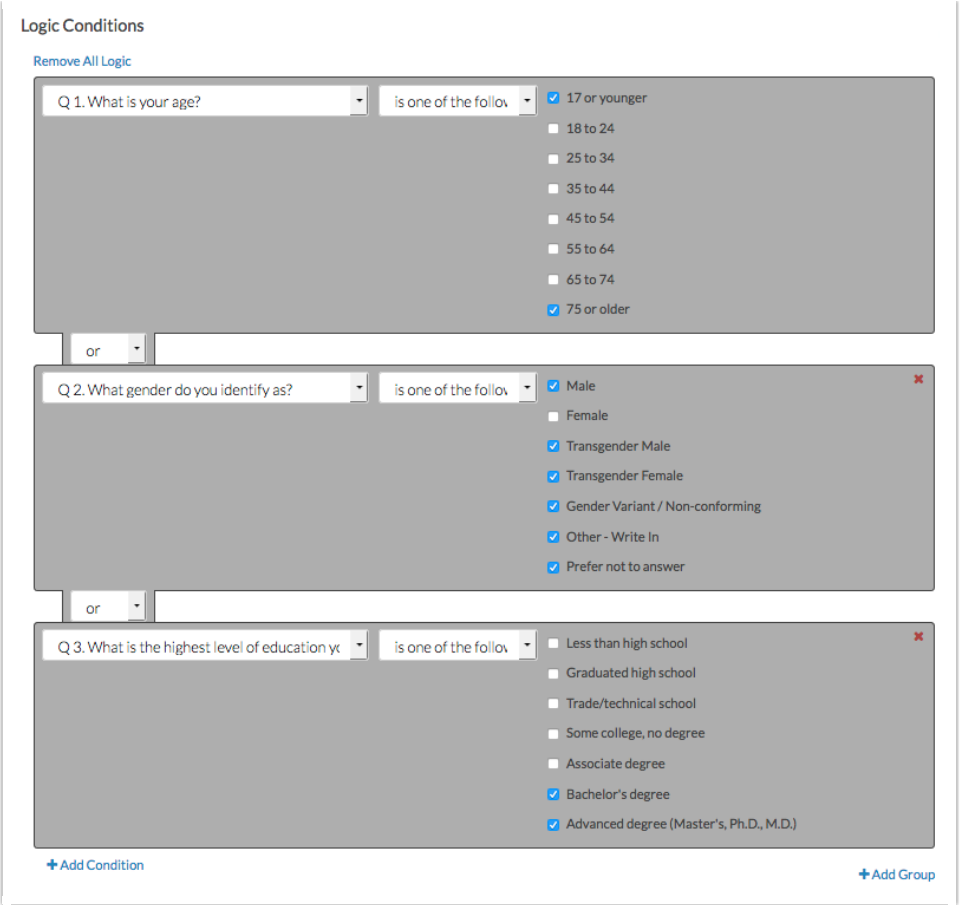
1. Start by setting up a question for each demographic requirement you defined. For example, let's imagine that we want to collect responses from the following target audience:
   - Women
   - Ages 18-54
   - Associate degree or lower
2. We will set up the following questions in our survey to verify that they meet our audience requirements.



3. Next, set up the Disqualify Logic for respondents who do not meet your requirements. To do so, click the **Skip/Disqualify Logic** link at the bottom of the page with your demographic questions.



4. Set up the logic condition(s) for the disqualify question by choosing the answer option(s) that *should* disqualify the respondents. In our example this would be any respondent who:
    - selects 17 or younger *or* 65 or older in our "What is your age?" question.
    - does not identify as Female in our "What gender do you identify as?" question
    - selects Bachelor's degree or Advanced Degree in our "What is the highest level of education that you have completed?" question.



Best Practice Tip

Notice in the above example we used *positive* logic to set up the logic rules for respondents we wish to disqualify. This is because positive logic is much easier to think about and get set up correctly.

When setting up disqualify logic, it is very tempting to set up negative logic to define respondents you wish to disqualify. Before using negative logic make sure you read our Best Practice Guide: Understanding Negative Logic and test and re-test your logic to ensure it is doing what you want!

5. Below your logic conditions you will set up what you wish to have happen when your logic conditions are met.

   For panels you will typically redirect disqualified/terminated responses back to the panel company. To set this up select the option for **If the Logic Passes, send the respondent to > External URL**.

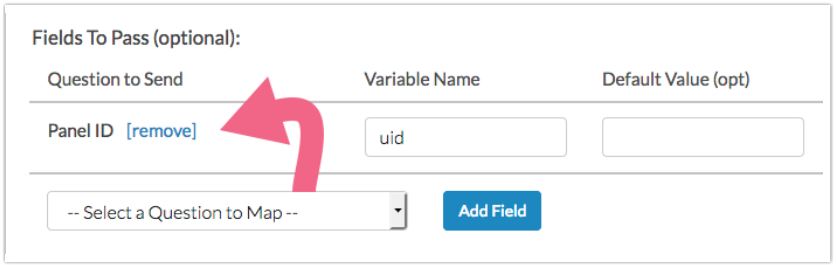
6. In the **URL** field paste the *disqualify link* provided by the panel company and *remove the Panel ID at the end (we will add the ID back starting with step 8).*

If the link looks like this: http://yourfriendlypanelco.com/disqualified?uid=xxxxxx
Then enter this: http://yourfriendlypanelco.com/disqualified

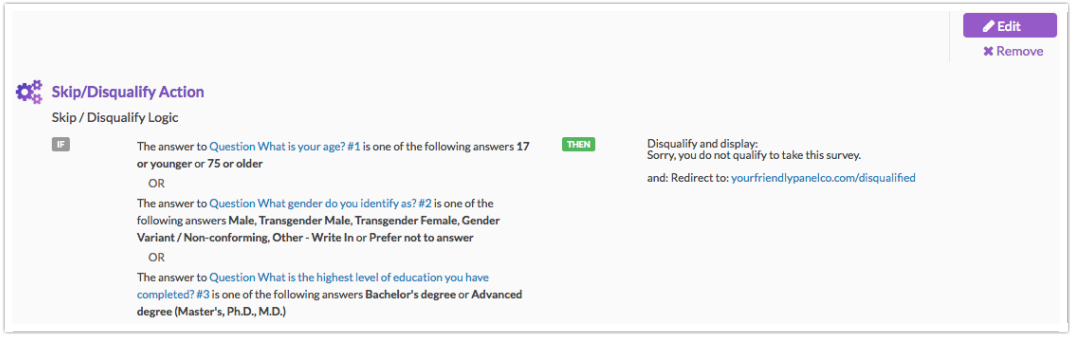
Not sure where to find these links? Check out step 1 of our Panel Integration Tutorial for more info!

7. Next, select the **If the Logic Passes, mark the response as > Disqualified** option. This will disqualify the respondent so they don't record as a Partial response in your data.
8. Customize the message to show to disqualified respondents.
9. In the **Fields to Pass**, select your Panel ID Hidden Value in the **Question to Send** dropdown menu.

   Don't have a Panel ID Hidden Value set up yet? Check out steps 1 and 2 of our Panel Integration Tutorial to learn how!
10. Click **Add Field** and define the **Variable Name** — This is where we will put **uid**. *This should be your Panel ID.*
11. Click **Save Action**.



When it's complete, your Disqualify Logic should end up looking something like this:



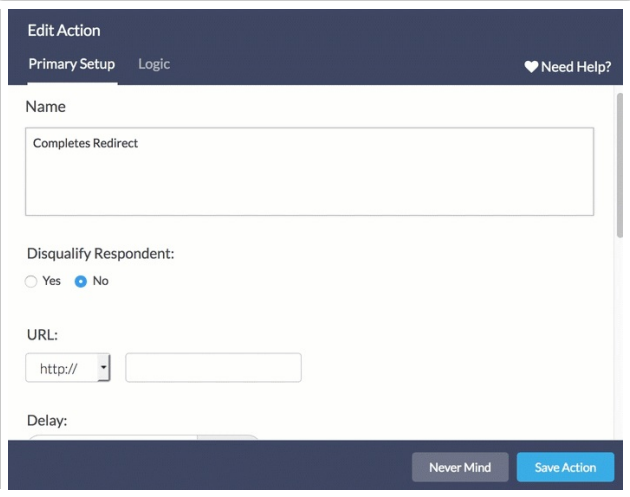
Alternative Option: Set Up Disqualification Page

Step 4: Set Up Redirect for Respondents Who Complete the Survey

Now, you need to set up the URL Redirect to send respondents who complete your survey back to the panel company to notify them that that specific respondent completed the survey. This should be placed on the Thank You page of your survey.

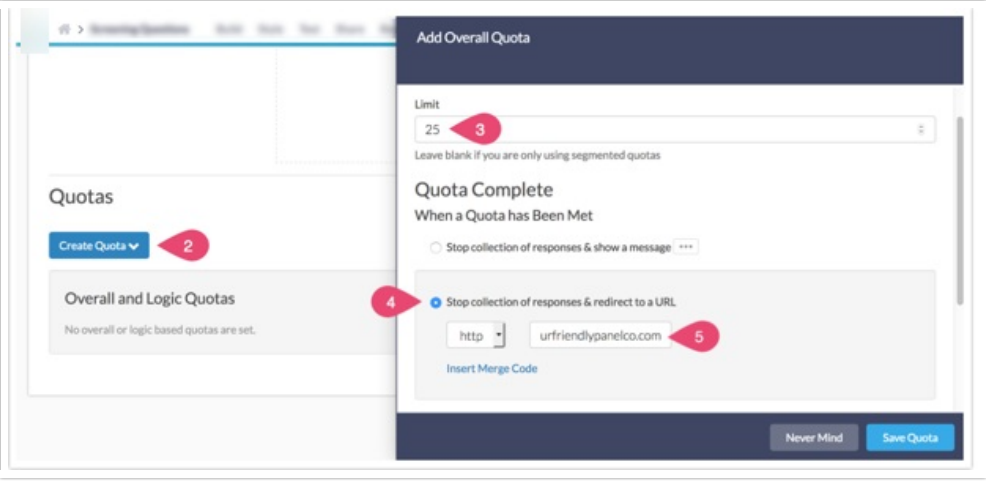
1. Click **Action** > **URL Redirect**.
2. In the **URL** field paste the completed link provided by the panel company and *remove the Panel ID at the end (we will add the ID back starting with step 4).*

   If it looks like this: http://yourfriendlypanelco.com/completes?uid=xxxxxx
   Then enter this: yourfriendlypanelco.com/completes
3. Set a **Delay** (in seconds) for the redirect; this way your completed respondents will see your Thank You message. You can ignore the disqualify message this time around.
4. In the **Fields to Pass**, select the Panel ID Hidden Value you created in the **Question to Send** dropdown menu.
5. Click **Add Field** and define the **Variable Name** — This is where we will put **uid** in our example case. *Remember this should be your Panel ID.*
6. Click **Save Action**.

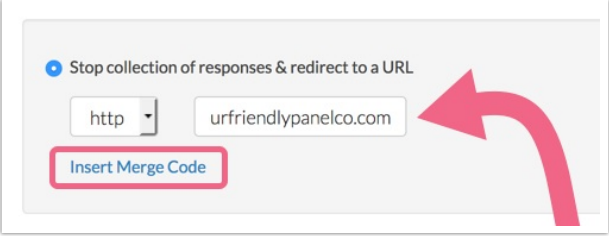


Step 5: Set Up Over Quotas

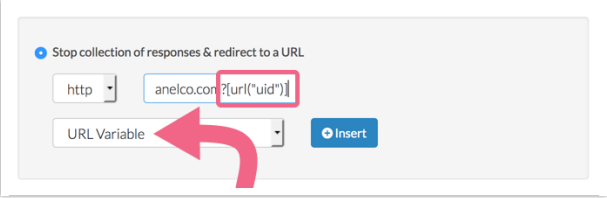
1. Go to **Tools** > **Quotas**.
2. Click **Create Quota** > **Overall Quota**.
3. Add a **Limit** for your quota.
4. Select to **Stop collection of responses & redirect to a URL** under the **When a Quota has Been Met**.
5. Paste your over quota URL (provided by your panel company).



6. At the end of the URL, you need to set up your Panel ID URL variable to pass back to the panel company. In our example it is **uid**. The panel id URL variable should be followed by an **equals sign (=)**. The tricky part is what precedes the URL variable; it should be either a **question mark (?)** or an **ampersand (&)**. If it is the only URL variable then use a question mark. If it is one of several URL variables use an ampersand. You can check the URL for a question mark, if there's already one there, then append your URL variable to the end with an ampersand.



7. Finally, using the merge code helper, insert the merge code for the URL Variable that stores your Panel ID. This inserts the specific value of your URL Variable for each response and passes it through to the Panel company. Make sure to replace the placeholder 'xxx' with the name of your variable - 'uid' in our example.



When you are finished your link should look similar to the following:

```
http://yourfriendlypanelco.com/quotas?uid=[url("uid")]
```

Make sure to **Save Quota** on the bottom right of the page. From there, you will just need to send the main share link to your Panel company for testing. Cheers & happy surveying!

> **Need More Help?**
>
> Download a template panel survey with each of the above elements already configured.

FAQ: How do I set up my panel survey to accommodate non-panel respondents too?

If you have another source of respondents in addition to your panel respondents you will need to make some modifications to the above setup so that non-panel respondents are not redirected to your panel.

Probably more important, you don't want these non-panel respondents to count towards your quota. Follow these modifications to the above setup in order to allow non-panel respondents to respond to your survey that is set up for panel respondents.

Modify Your Disqualify Logic

First, you will want to modify your disqualify logic so that non-panel respondents are not redirected to your panel.

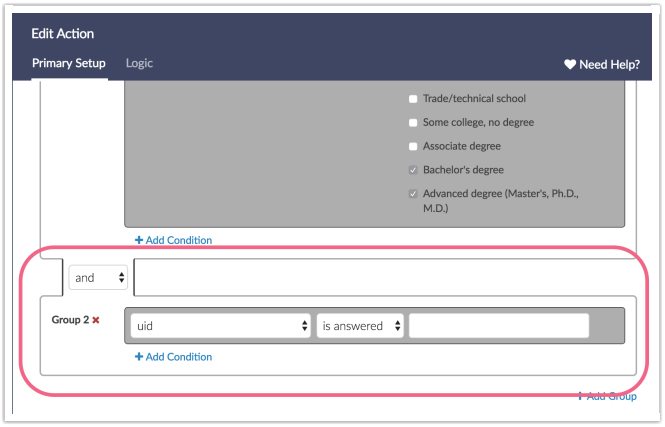
1. To do so, edit your Disqualify Logic that follows your screener question page.

2. Click **Add Group** at the bottom of your existing logic conditions.

3. Leave the and/or operator set to **and**.

4. Select your Panel ID Hidden Value in the first dropdown of the logic builder.

5. In the second dropdown of the logic builder select **is answered**.



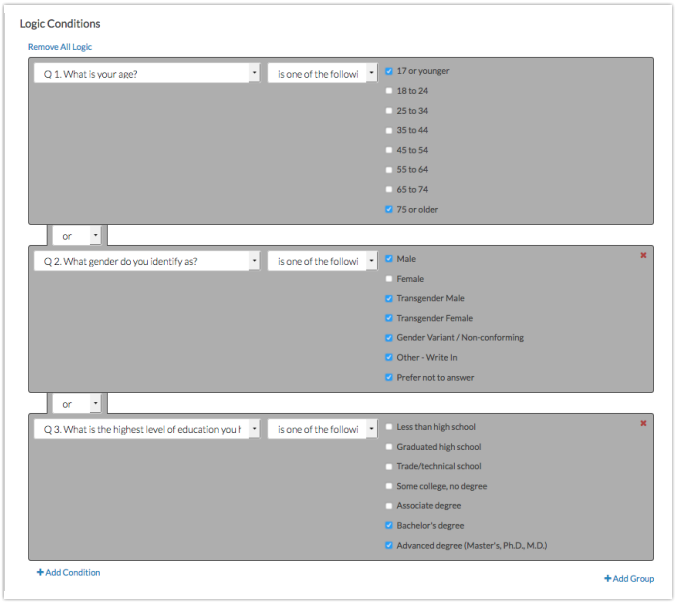
6. Click **Save Action**.

Adding this condition will ensure that only respondents with a panel id (and the other conditions specified) will be disqualified.

(Optional) Add a Second Disqualify Logic Action for Non-Panel Respondents
If you would like to use your screener questions to disqualify non-panel respondents you will need to add a second disqualify action to handle this.

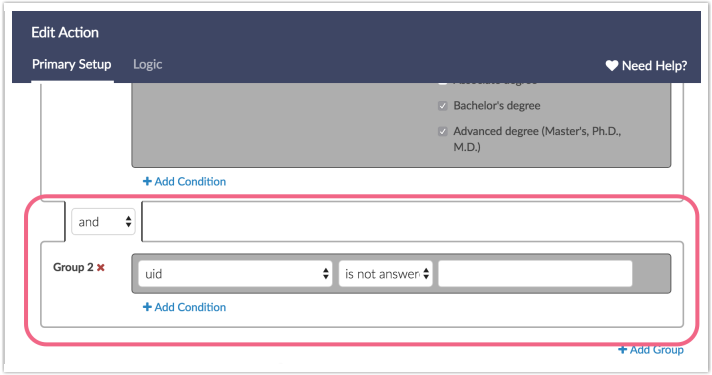
1. To do so, click the **Skip/Disqualify Logic** link below your existing Disqualify Action.

2. Using your screener questions set up the logic conditions for respondents you wish to



disqualify.

Make sure to also include a separate group condition with Panel ID and set it to **is not answered** so that your condition is only applied to non-panel respondents.



3. Under **If the Logic Passes, mark the response as** select the **Disqualified** option and customize the message that is displayed.

4. Click **Save Action**.

Modify Your URL Redirect for Completes

You'll also want to add some logic to your redirect for complete respondents so that non-panel respondents are not redirected to your panel.

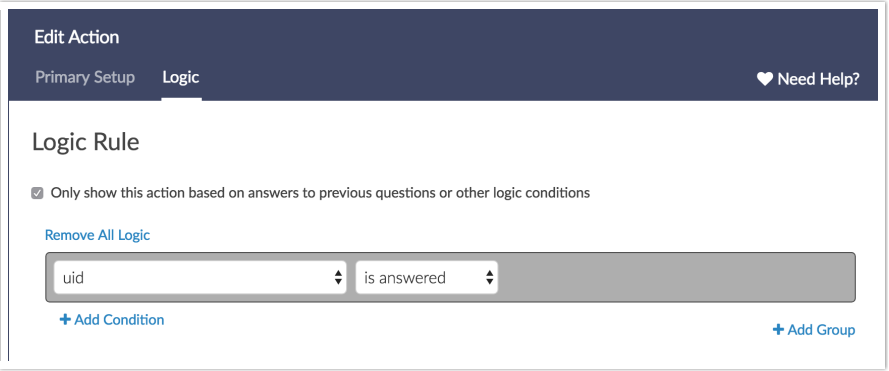
1. To do so, edit the URL Redirect on your Thank You page.

2. Go to the **Logic** tab.

3. Select **Only show this action based on answers to previous questions or other logic conditions** .

4. Select your Panel ID Hidden Value in the first dropdown of the logic builder.

5. In the second dropdown of the logic builder select **is answered**.

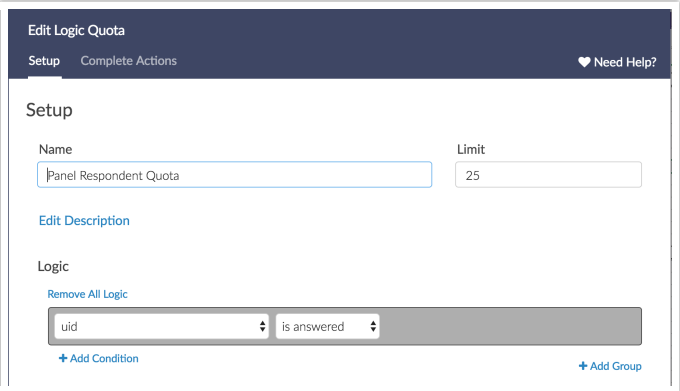


If you decide to create a redirect for non-panel respondents make sure to also include a separate group condition with Panel ID and set it to **is not answered** so that your condition is only applied to non-panel respondents.

Using Logic Quotas in Place of an Overall Quota

Finally, you'll also want to use a different quota setup to ensure that non-panel respondents do not count towards your quota.

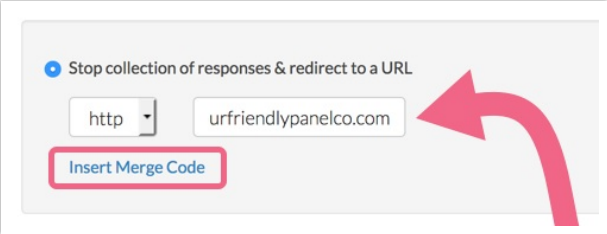
1. Go to **Tools** > **Quotas**.
2. Instead of using an Overall Quota you're going to set up a Logic Quota. If you already set up the Overall Quota from the steps above use the x icon to delete the Overall Quota.
3. Click **Create Quota** > **Logic Quota**
4. Give your quota a **Name** and add a **Limit** for your quota.
5. Under **Logic** select your Panel ID Hidden Value in the first dropdown of the logic builder.
6. In the second dropdown of the logic builder select **is answered**.



7. On the **Complete Actions** tab select to **Stop collection of responses & redirect to a URL** under the **When a Quota has Been Met**.

8. Paste your over quota URL (provided by your panel company).

9. At the end of the URL, you need to set up your Panel ID URL variable to pass back to the panel company. In our example it is **uid**. The panel id URL variable should be followed by an **equals sign (=)**. The tricky part is what precedes the URL variable; it should be either a **question mark (?)** or an **ampersand (&)**. If it is the only URL variable then use a question mark. If it is one of several URL variables use an ampersand. You can simply check the URL for a question mark, if there's already one there, then append your URL variable to the end with an ampersand.



10. Finally, using the merge code helper, insert the merge code for the URL Variable that stores your Panel ID. This inserts the specific value of your URL Variable for each response and passes it through to the Panel company. Make sure to replace the placeholder 'xxx' with the name of your variable - 'uid' in our example.

When you are finished your link should look similar to the following:

```
http://yourfriendlypanelco.com/quotas?uid=[url("uid")]
```

Make sure to **Save Quota** on the bottom right of the page. Cheers and happy surveying!

> **Need More Help?**
>
> Download a template panel/non-panel hybrid survey with each of the above elements set up.

> Need help finding a respondent pool? Let our Professional Audience Services team find your target audience and integrate your survey to collect the data you need!

Related Articles