



# Integration: Survey Responses

Contact surveys are a flexible data structure that allow Total Expert's integration partners to store additional details around a contact that are not supported by the standard [contact fields](#). Integration partners can send survey responses to Total Expert and update contact records with crucial and timely marketing information, such as when a contact creates an account in the integration partner platform, or submits their mortgage application. Integration partners provide this information to Total Expert using the Survey Response API endpoint. Mutual customers of Total Expert can subsequently configure the responses to trigger marketing automation in Total Expert, increasing the value of the integration.

Refer to Total Expert's [public documentation](#) to learn more about surveys, survey responses, and their supported fields and relationships.

## Create Survey and Fetch Question IDs

Prior to engaging an end user on their platform, the integration partner must consult the mutual customer to determine what contact-specific data they want sent into the Total Expert CRM that is not supported by the contact fields. After consulting with the customer, the integration partner creates the survey for that customer.

1. Create a survey with a POST request.

`https://public.totalexpert.net/v1/contact-surveys`

Example request-body:

```
{
  "source": "Integration Partner",
  "survey_name": "IntPartner-Org Survey",
  "version": "1.0",
  "questions": [
    {
      "question_text": "Application Status",
      "system_name": "AppStatus",
      "data_type": "choice",
      "sort_order": "1" ,
      "possible_choice_answers": [
        {
          "value": "Application Ready to Start",
          "system_name": "AppReady"
        },
        {
          "value": "Application in Progress",
          "system_name": "AppProg"
        }
      ]
    }
  ]
}
```



```
        "value": "Application Completed",
        "system_name": "AppComplete"
    }
}]}}
```

Example response:

```
"created": "https://public.totalexpert.net/v1/contact-surveys/b2d1860d4df74ad5",
"id": "b2d1860d4df74ad5"
```

The Total Expert API creates the survey with a unique ID.

2. Use this ID in a GET request to obtain survey details:

```
https://public.totalexpert.net/v1/contact-surveys/b2d1860d4df74ad5
```

Example response (first question displayed):

```
"questions": [
  {
    "data_type": "choice",
    "id": "9bb6875762b852ec",
    "question_text": "Application Status",
    "sort_order": "1",
    "system_name": "AppStatus",
    "possible_choice_answers": [
      {
        "sort_order": "0",
        "system_name": "AppComplete",
        "value": "Application Completed"
      },
      {
        "sort_order": "0",
        "system_name": "AppProg",
        "value": "Application in Progress"
      },
      {
        "sort_order": "0",
        "system_name": "AppReady",
        "value": "Application Ready to Start"
      }
    ]
  }
]
```

This request provides an ID for each question in the survey. Save these IDs for later.



After creating the survey and obtaining the `question_id`, your integration is prepared to send responses that update the customer's instance of Total Expert.

## Update Contact Record with Survey Responses

Customers funnel their contacts to the integration partner platform. As those contacts engage with the platform, the integration partner can send survey responses to update their application status in Total Expert.

3. A contact creates an account in the integration platform and begins a mortgage application.
4. The integration partner uses contact's email address in a GET request with an email query:

```
https://public.totalexpert.net/v1/contacts?filter=email=turgon@noldor.com
```

Example response:

```
"first_name": "Turgon",  
"id": 169503264,
```

Use this ID to associate the survey response to the specific contact in your request.

5. The integration partner uses a POST request, including their survey's ID and the contact's ID, to update the contact's application status. This request is made to the Survey Response endpoint:

```
https://public.totalexpert.net/v1/contact-survey-responses
```

Example request-body:

```
{  
  "contact": {  
    "id": "169503264"  
  },  
  "survey": {  
    "id": "b2d1860d4df74ad5"  
  },  
  "owner": {  
    "id": "AdminExternal1"  
  },  
  "question_responses": [  
    {  
      "question": {  
        "id": "9bb6875762b852ec"  
      },  
      "response_value": "Application in Progress"  
    },  
  ]  
}
```

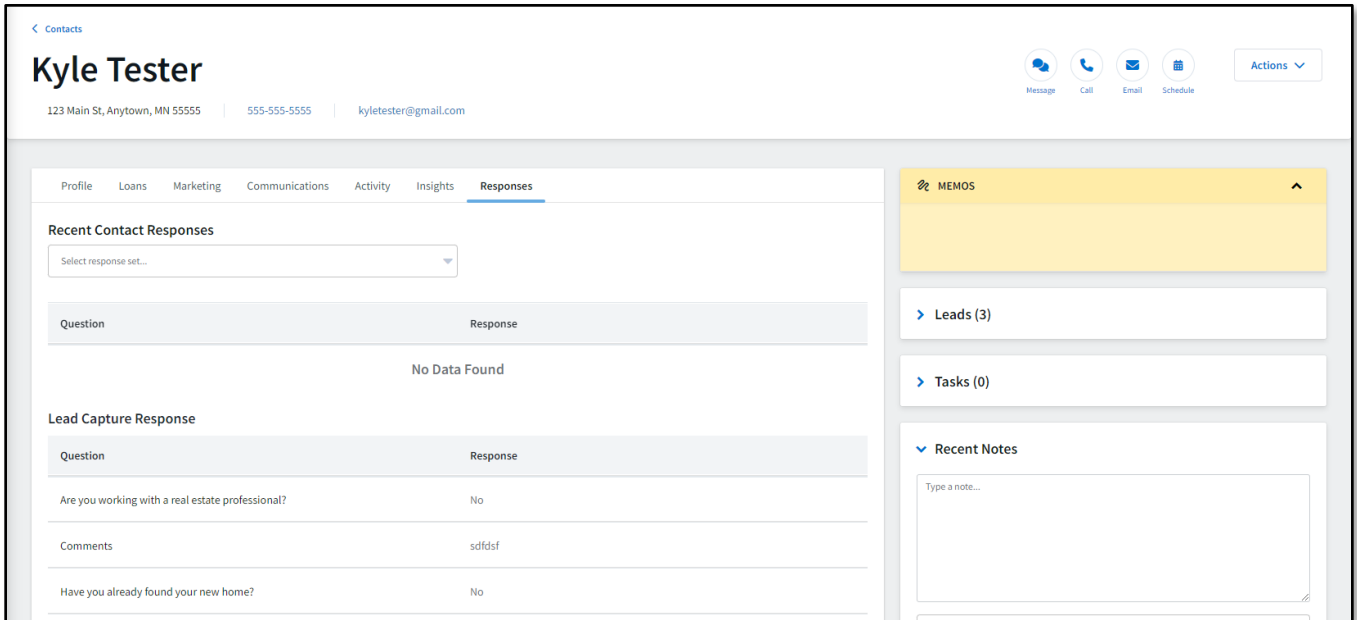


### Note

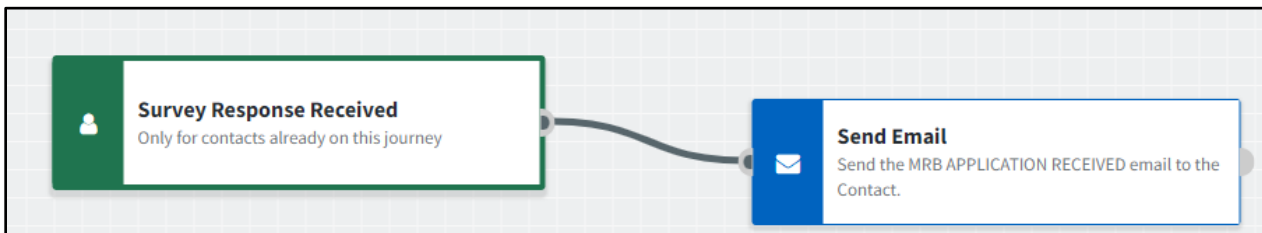
This request has two discrete functions; it attaches the survey to the contact, and it assigns response values to that contact's survey response record.

- When the contact submits their application, the integration partner uses a second POST request to change the `response_value` field to `Application Completed`.

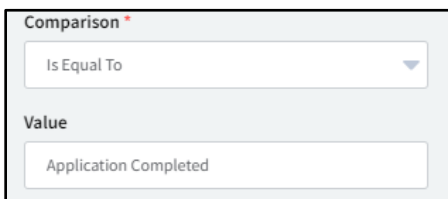
Survey responses are tracked with timestamps in Total Expert, so you can view and track changes over time. When viewing the details page for a contact, click the **Responses** tab. Any survey responses are shown in the Recent Contact Responses section.



Customers can tie the responses to marketing automation in Total Expert through the journeys feature. In this example, when the `Application Completed` value is received from the integration partner, a followup email is automatically sent through Total Expert:



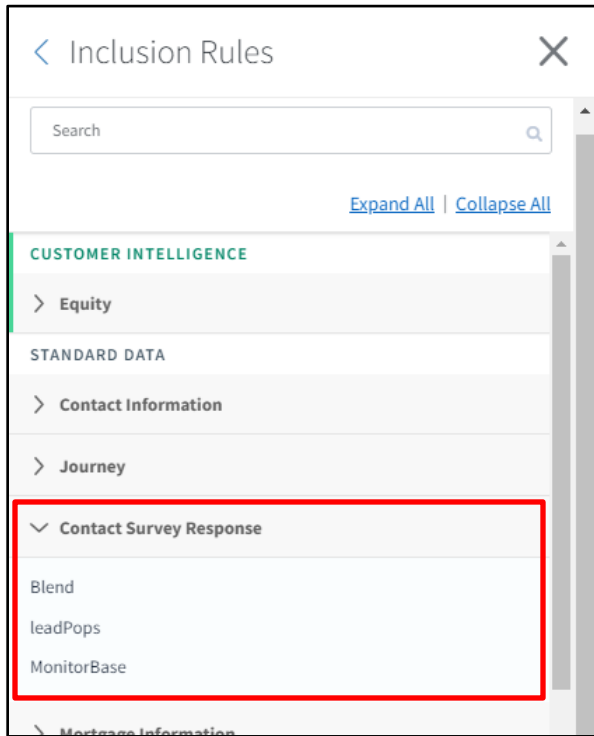
The Survey Response Received trigger checks the response value with an Is Equal To operator:





# Using Survey Responses in Total Expert

In addition to the journey condition described above, survey responses can be used when building inclusion and exclusion rules for focused views and campaigns and while filtering the contact list.



## Other Survey Use Cases

Integration partners can also leverage the Survey endpoints to update loan application details that are subject to change as the loan origination process unfolds:

- Reported income → verified income
- Changes to home appraisal value
- Changes to credit score

These response updates are especially useful to customers servicing loan applications. Timely updates help customers communicate efficiently with their leads and facilitate a smooth origination process.