Which Salesforce Field Should I Use With Each Alchemer Question Type?

The Salesforce Integration is available as an add-on. If you are interested in the Salesforce Integration, please contact us for additional information.

Selecting the right Alchemer question type for the kind of data you wish to gather on your survey is paramount. Making sure that you are connecting that question to the right type of field in your Salesforce instance is just as crucial.

For most question types there are a few Salesforce fields that are compatible; for other question types, there is only one Salesforce field that is compatible.

Compatible Questions and Salesforce Fields

Question Type	Supported by Salesforce	Salesforce Field(s)
Radio Button	✔	Picklist
Checkbox	✔	Picklist (multi-select)
Textbox	✔	Text, Text Area, Text Area (Long)
Radio Button Grid	✔	Picklist
Dropdown Menu	✔	Picklist, Picklist (multi-select)
Essay / Long Answer	✔	Text Area (Long)
Email	✔	Email
Date	✔	Date
Slider	✔	Picklist
Star Rating Grid	✔	Text, Picklist
Net Promoter Score®	✔	Picklist, Number, Text
File Upload	✔	Text
Drag & Drop Ranking	✔	Text
Ranking Grid	✔	Text
Rating (Likert Scale)	✔	Picklist, Text

Question Type	Supported by Salesforce	Salesforce Field(s)
Number	✔	Text, Number*
Percent	✔	Text
Image (select one)	✔	Picklist, Text
Image (multi-select)	✔	Picklist (multi-select), Text
Checkbox Grid	✔	Picklist (multi-select), Text
Signature	✖	
Dropdown Menu List	✔	Picklist, Text
Textbox List	✔	Text, Text Area (Long)
Continuous Sum	✔	Text
Slider List	✔	Text
Cascading Dropdown	✔	Text
Dropdown Menu Grid	✔	Text, Picklist, Picklist (multi-select)
Textbox Grid	✔	Text
Max Diff	✔	Text
Semantic Differential	✔	Text
Contact Form	✔	Corresponding Field for Sub-Question(s)
Custom Group	✔	Corresponding Field for Sub-Question(s)
Custom Table	✖	

* Number question validation allows for things like $,%, etc. This is compatible with a Text field in Salesforce which also allows for other non-numeric symbols. If you wish to use a **Number** field in Salesforce, you must use a Alchemer Textbox question with Regex validation in order to prevent entry of non-numeric characters in the field. Check out our Validating Textbox Answer Formats to learn more!

Understanding Salesforce Fields

There are things that Salesforce fields can (and cannot) do. Below we'll cover what is required for Salesforce fields.

Picklist
The **Picklist** must have values listed that correspond exactly to the reporting values on the Alchemer question. Think of a **Picklist** in Salesforce as a round hole that must have the exact corresponding round peg to fit into it.

The **Picklist (multi-select)** should be used for multiple select questions in Alchemer:

- Checkbox
- Dropdown Menu *(only when using the "Multi Select" option)*
- Image (multi-select)
- Checkbox Grid
- Dropdown Menu Grid

Specific Text & Number Field Types

Text Area - The **Text Area** field allows up to 255 characters and preserves the text if written on multiple lines. This is a useful field for your Textbox questions on Alchemer. We don't recommend using this field type if you are expecting your respondent to be typing more than one or two sentences in a Textbox or Essay/Long Answer question on your survey.

Text Area (Long) - The **Text Area (Long)** is a variation of the Text Area field, with the capability to accept between 256 and 131,072 characters. It has a default limit of 32,768 characters. This field type is best paired with the Essay / Long Answer question type in Alchemer.

Phone - If you need to capture a respondent's phone number, you'll want to use the **Phone** field in Salesforce. This field can be set up to support any phone number format in Salesforce. It can accept up to 40 characters. Make your Alchemer question validates for the same phone number format as that which is set for your Salesforce field. Check out our Create and Validate a Phone Number Question Tutorial to learn more.

Percent - This field accepts percentages as a decimal point and Salesforce then converts it to a percentage visually for you. For example, you would send "0.10" to this field so that it can display it as "10%." The Percent field cannot accept values that have a percentage sign attached to them. If you are using the Percent question type in Alchemer, it cannot pass the format it will gather to the Percent field type in Salesforce. In such situations, you will want to use the **Text** field type in Salesforce to capture a percentage instead.

Number - The **Number** field can accept numbers <u>only</u> and treats them as real numbers. It will strip leading zeros. If you are collecting data that has leading zeros that need to be preserved you need to use a **Text** field type in Salesforce to gather. It is also important to note that the Alchemer Number question validation allows for things like $,%, etc. This is compatible with a **Text** field in Salesforce which also allows for other non-numeric symbols. If you wish to use a **Number** field in Salesforce, you must use a Alchemer Textbox question with Regex validation in order to prevent entry of non-numeric characters in the field. Check out our Validating Textbox Answer Formats to learn more!

Email - If you need to capture an email address in Salesforce, you'll be using the **Email** field type. This field type accepts up to 80 characters and validates that the data includes an "@" symbol and a suffix including a .com/edu/org/gov ending (or other standard email suffices).

Date - The **Date** can accept and format information in common date formats. This field supports the YYYY/MM/DD format, as well as the following variations that include a time stamp as well:

- YYYY-MM-DD

- YYYY-MM-DD hh:mm:ss
- YYYY-MM-DDThh:mm:ssZ
- YYYY-MM-DDThh:mm:ss.sssZ

The "Z" noted at the end of the final two formats corresponds to the appropriate time zone that the hours/minutes/seconds corresponds to.

While it isn't possible to send a different date format directly from a Date question in Alchemer, you can ask your question in your desired format, alter and save it in Alchemer to be in YYYY/MM/DD format, before sending it to Salesforce. Check out our Passing Dates Tutorial to learn more.

Currency - If you are gathering currency amounts in your survey, you can send them to the **Currency** field in Salesforce. The Salesforce Currency field rounds currency amounts using "round-half-to-even tie-breaking rule" to make the amounts whole numbers. For example, 23.3 becomes 24, 22.8 becomes 22, −22.6 becomes −22, and −23.2 becomes −24. Simply put, any non-whole odd number will be rounded up and any non-whole even number will be rounded down. The Currency field will also lose accuracy after 15 decimal places.

URL - The **URL** field in Salesforce validates that data is in web address format (i.e. containing a .com/edu/org/gov format). It can accept up to 255 characters and will display the first 50 of those characters on the record page in Salesforce.

Checkbox - To populate a **Checkbox** field in Salesforce you will need to pass a Boolean true/false.

Best Practices for Organizing Data in Salesforce

Sending data from your surveys to Salesforce is only the first step. Making sure you put that data in the right types of fields in Salesforce will help you streamline your data analysis.

Here are some tips of what field to use in Salesforce for commonly collected information:

- Open text questions generally fit best in the standard **Text** field in Salesforce, but knowing how much text you are expecting your respondent to enter can help you choose if a **Text Area (Long)** field in Salesforce might fit better. If you are expecting just a word or a sentence or two from your respondent, using the **Text** field in Salesforce works best. If you want more than a few sentences and in the range of a paragraph or more, using a **Text Area (Long)** field in Salesforce is a necessity. Using the **Text Area (Long)** with your Essay/Long Answer questions is almost always going to be the best practice.
- Pairing email address and date questions on your survey with their corresponding fields on Salesforce, instead of using the standard **Text** field allows you to leverage features such as workflows in Salesforce.
- Grid questions in Alchemer can always pass each row's worth of data gathered to **Text** fields in Salesforce. Setting up different field types such a **Picklist** or **Picklist (multi-select)** when compatible with the type of Grid will let you organize your data in Salesforce in an easier fashion.
- When in doubt, use a **Text** field. Almost all Alchemer question types can push data into a **Text** field in Salesforce. As long as your answer option or the text entered by the respondent is less

than 256 characters, it can commonly be placed in a **Text** field in Salesforce. This can be handy if you just need to have the data in a record on Salesforce as is.

- Connect your File Upload question to a **Text** field in Salesforce. While Alchemer can't pass the uploaded file itself to Salesforce, it does pass the link to where that file is stored safely on Alchemer. You can use the link from your Salesforce record to open and review that file when you need. Note: If your File Upload question allows for multiple files to be uploaded, one the first uploaded file will be passed to Salesforce. If you need multiple files, you will need separate File Upload questions for each required file. *Remember that while the link will be sent to Salesforce right away, the file itself can take a few minutes to become available on our storage system for download.*

Unsupported Alchemer Question Types

Data from the following question types cannot be populated from or passed to Salesforce:

- Custom Table
- Signature

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