

Legacy - Alchemer Survey HubSpot Integration

Connect your Alchemer and [HubSpot](#) accounts to take your data collection to the next level! Alchemer's HubSpot integration allows you to automate the contact creation/lead generation process within HubSpot and also provides you with the ability to use your HubSpot [Contact Record Properties](#) to populate data into your Alchemer surveys (a great way to keep your contact records up to date).

The Alchemer HubSpot Action allows you to:

1. Create or Update contacts in HubSpot from Alchemer survey submissions using the HubSpot **Push** Action. The push allows for:

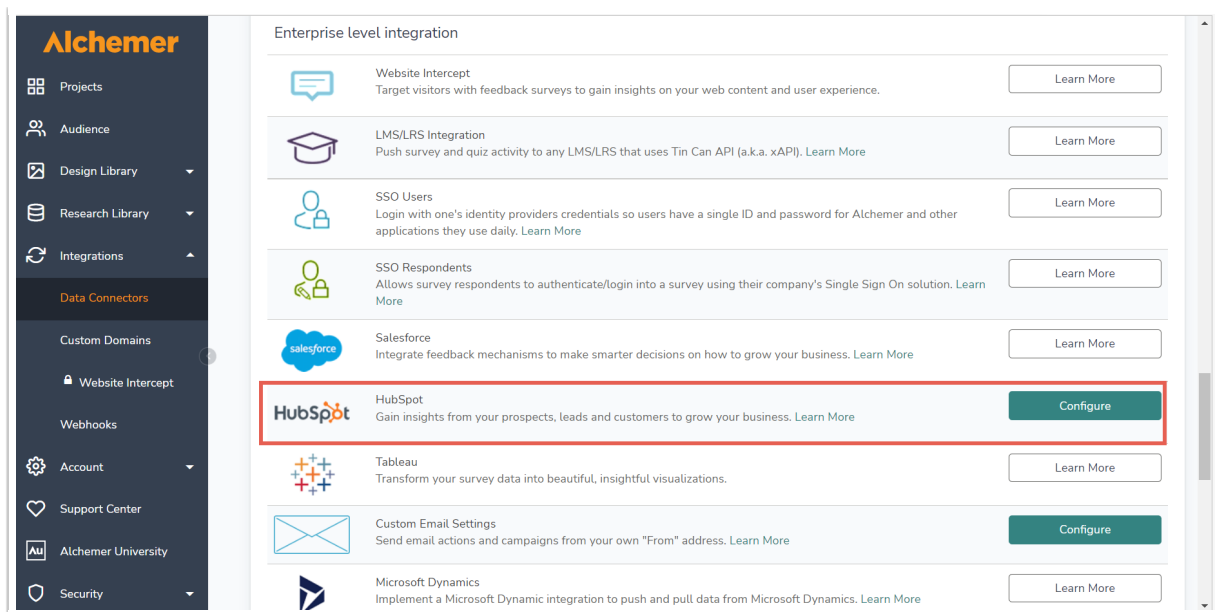
- **Upsert** - If you have an existing contact, the contact email will be used to update an existing contact record during an upsert. If an email does not exist, a new contact record will be created. An upsert is a conditional action: *update* if it exists, *insert* if it doesn't.
- **Insert** - Insert is the term used for creating a new contact record. An identifier is not mapped in this case as it doesn't exist.
- **Update** - An update is an update of an existing contact record. An email address (unique identifier) is required.

2. Pull contact information (HubSpot Contact Record Properties) into questions/fields within your Alchemer survey using a **Pull** Action.

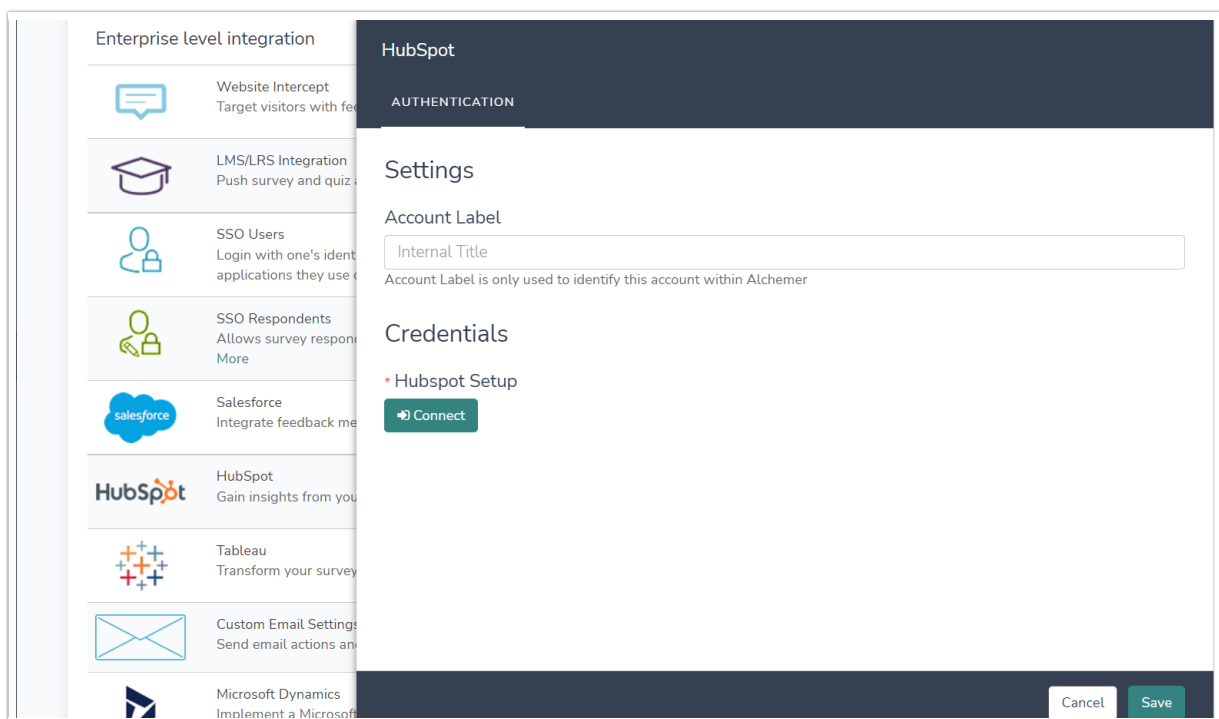
Integration Setup

The HubSpot Integration is available for purchase by Account Administrators via [Account > Integrations](#). Once you've purchased this integration, you can connect Alchemer and HubSpot.

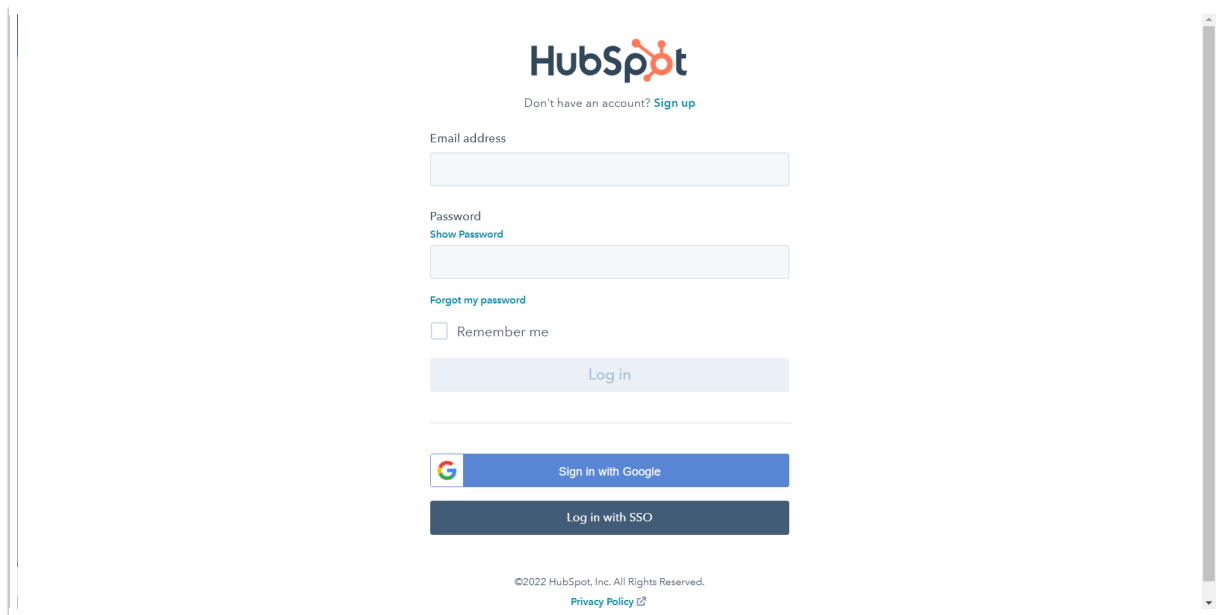
1. Navigate to **Integrations > Data Connectors** and locate the HubSpot integration. Click the **Configure** button to get started.



2. Click Connect



3. Enter your account information in the window that appears to connect HubSpot and Alchemer.

The image shows the HubSpot login page. At the top is the HubSpot logo. Below it is a link that says "Don't have an account? Sign up". The main form has two input fields: "Email address" and "Password". Below the password field is a link that says "Show Password". There is also a link that says "Forgot my password". Below these links is a checkbox labeled "Remember me". A "Log in" button is positioned below the checkbox. At the bottom of the form are two buttons: "Sign in with Google" (with the Google logo) and "Log in with SSO". At the very bottom of the page, there is a copyright notice: "©2022 HubSpot, Inc. All Rights Reserved." and a link to the "Privacy Policy".

4. Once you are finished setting up your integration click **Save**. You can now add the **HubSpot Action** to your surveys to push/pull contact data.

HubSpot (Push) Action

Alchemer's HubSpot Action (push method) allows you to automate the contact creation/lead generation process. Use your Alchemer survey to collect contact details, which can then be synced with your HubSpot account [Contact Record Properties](#). You can also use the push method to update existing records.

HubSpot Push Setup

Your push action must be on a page follows any survey questions that you will be sending to HubSpot. We recommend placing the push action on your survey's Thank You page.

1. Click the **Action** link on the page where you wish to place your action and locate the **HubSpot** action within the **Integrations** section. Click the **+Add** button.
2. Provide an **Integration Title** for your action (This is a title that is internal to you and your fellow Alchemer users; it should represent the purpose of the action.)
3. **Select a HubSpot Integration** using the provided dropdown menu. Your integration will be identified by the account label that you provided on the **Integrations** page when connecting your accounts.
4. Using the **Select an Object** dropdown menu, choose the object-type that you will be *pushing* to. Currently, the **contact** object is the only available object-type.

Integration Title

HubSpot Create/Update Contact

Select a HubSpot Integration

HubSpot Integration

-- Select an Object --

✓ contact

5. For the purpose of the *push* action, select **Push Data to HubSpot** under the **Method** section. Select the type of *push* that you want to execute:

- **Upsert** - If the provided email address exists in HubSpot, the survey response will be used to update an existing contact record with that email during an upsert. If an email address doesn't exist, a new contact record will be created with the provided email address.
- **Insert** - Insert is the term used for creating a new contact record. *An email address is required to insert/create a new contact in HubSpot.*
- **Update** - An update is just that, an update of an existing contact record. As such, an email address (unique identifier) is required to reference the contact record that should be updated.

Select a HubSpot Integration

HubSpot Integration

contact

Method

☐ Pull Data from HubSpot

☒ Push Data to HubSpot

Push data via

✓ Upsert

Insert

Update

6. The next step requires identifying the survey question/field where the respondent's email address will be stored:

- *An email address is required* to create or update an existing contact record in HubSpot. This email address must be passed into or collected on the survey and stored in either a [question](#) or [Hidden Value Action](#).
- Use the dropdown under **Question containing the HubSpot Contact Email** to select the survey question/field that captures the respondent's email.

Method

☐ Pull Data from HubSpot

☒ Push Data to HubSpot

Push data via

Upsert

Question containing the HubSpot Contact Email

Q 1. Email

- In the event that you need to pass in the email address as a url variable or reference it via a merge code, select the **Static Value (Merge Codes, etc.)** option. You will see an additional field and can input a static value or use the merge code helper to reference the email address:

7. Once you have determined the type of Push that you want to execute, it's time to **Map Fields**. Within the Map Fields section (click [here](#) for an important note about field-mapping):

- In the *left-hand column*, select the Alchemer question/field from which you want to send data.
- In the *right-hand column*, select the corresponding HubSpot [Contact Record Property](#), that you want to send the question data to.
- Use the **Default Value** field to pass information to HubSpot in the event that the Alchemer field is left blank.
- Use the **Add another mapping** link to add more field pairs as needed.

8. Once you have finished your field-mapping, navigate to the Logic tab if you need to apply any conditions for triggering your HubSpot Push. Make sure to **Save Action** when finished.

⊕ Example - Create a New Lead

HubSpot (Pull) Action

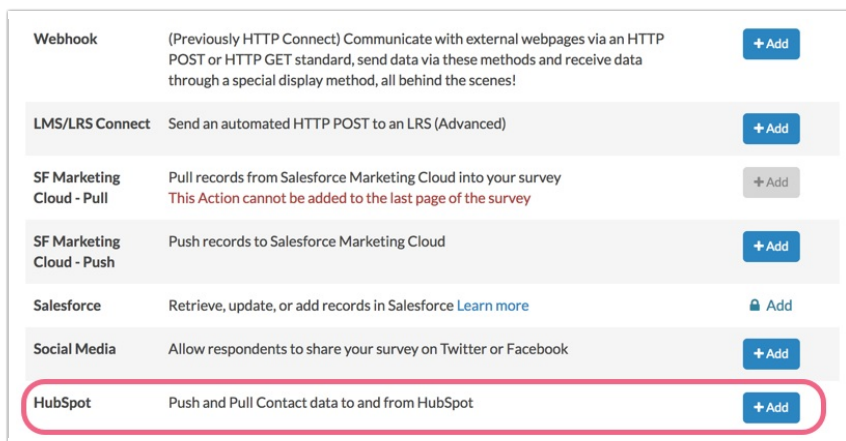
Alchemer's HubSpot Pull Action provides you with the ability to use your [Contact Record Properties](#) within your Alchemer surveys. This can be combined with a *push* action to help you keep your contact information up to date.

HubSpot Pull Setup

When pulling contact data from HubSpot into Alchemer, the survey will need to be able to *identify* the contact whose information should be pulled in. This is done by referencing the contact's email address.

The *pull* action should be added before any fields that it will be populating. Keep in mind that the respondent's email address will need to be referenced in order to pull in any associated information. Refer to our [example workflow below](#) for one potential scenario.

1. On the page where you want to place your action, click the **Action** link and locate the **HubSpot** action within the **Integrations** section. Click the **+Add** button.

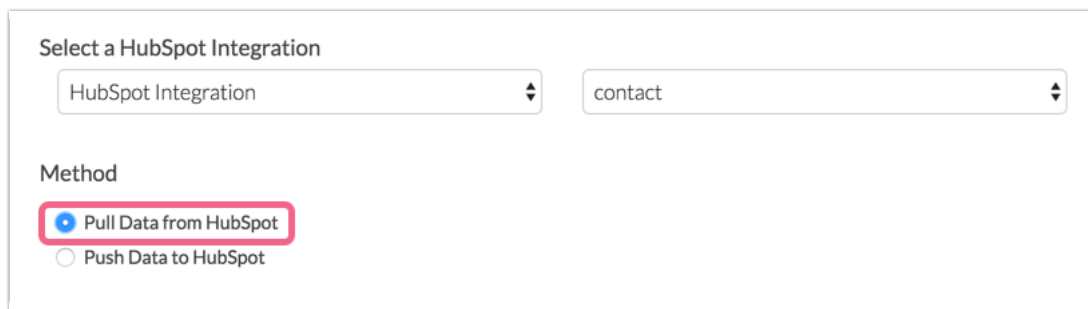


2. Provide a **Integration Title** for your action (this is an internal title) and **Select a HubSpot Integration** using the provided dropdown menu. Your integration will be identified by the account label that you provided on the **Integrations** page.

The screenshot shows the 'Edit Action' form with the 'Primary Setup' tab selected. The 'Integration Title' field is filled with 'Pull Contact Information'. Below it, the 'Select a HubSpot Integration' dropdown menu is open, displaying three options: a default selection '-- Select an Integration --', 'HubSpot Integration' (which is highlighted in blue), and 'New'.

3. Using the **Select an Object** dropdown menu, choose the object-type that you will be *pulling* from. Currently, the **contact** object is the only available object-type.

4. For the purpose of the *pull* action, select **Pull Data from HubSpot** under the **Method** section.



Select a HubSpot Integration

HubSpot Integration contact

Method

☒ Pull Data from HubSpot

☐ Push Data to HubSpot

5. An *email address* is required to reference an existing contact record in HubSpot.
- This email address must be passed into or collected on the survey and stored in either a question or [Hidden Value Action](#).
 - Use the dropdown under **Question containing the HubSpot Contact Email** to select the survey question/field that captures the respondent's email. *This field must be on a page that precedes the pull action you are setting up.*
 - In the event that you need to pass in the email address as a url variable or reference it via a merge code, select the **Static Value (Merge Codes, etc.)** option. You will see an additional field and can input a static value or use the merge code helper to reference the email address:



Question containing the HubSpot Contact Email

Static Value (Merge Codes, etc.)

[url("email")]

[Select a Merge Code](#)

6. Once you have identified the question/field that collect the respondent email, it's time to **Map Fields**. Within the Map Fields section (click [here](#) for an important note about field-mapping):
- In the *left-hand column*, select the Alchemer question/field that you want to feed data into.
 - In the *right-hand column*, select the corresponding HubSpot [Contact Record Property](#), from which you want to pass data.
 - Use the **Default Value** field to pass a default value into Alchemer in the event that the field is blank for that record in HubSpot.
 - Use the **Add another mapping** link to add more field pairs as needed.
-

Method

☒ Pull Data from HubSpot

☐ Push Data to HubSpot

Question containing the HubSpot Contact Email

capture email

Map Fields

SurveyGizmo		HubSpot	Default Value
Q 1. Email Address	←	Email	
Q 2. First Name	←	First Name	
Q 3. Last Name	←	Last Name	
Q 4. Job Title	←	Job Title	
Q 5. Based on your recent purcha	←	NPS	

[+ Add another mapping](#)

7. Once you have finished your field-mapping, navigate to the Logic tab if you need to apply any conditions for triggering your HubSpot Pull. Make sure to **Save Action** when finished.

⊕ Example - Pull Data From HubSpot into Alchemer

Mapping Fields

When mapping Alchemer Questions to HubSpot Properties, it is critical that the Alchemer **Reporting Values** are identical to the HubSpot Property **Internal Values**.

For the sake of example, in our Alchemer survey we have a Radio Button question titled *Lead Status*. Our answers options and reporting values are configured as follows:

Question Type

☒ Radio Buttons

What question do you want to ask? ☐ Require this question

Lead Status

Multiple Choice Options

OPTION

New

Open

In Progress

Open Deal

Unqualified

[+ Click to Add Option](#) [Add "Other"/"N/A", etc](#) [Paste in Options](#)

REPORTING VALUE

NEW

OPEN

IN_PROGRESS

OPEN_DEAL

UNQUALIFIED

Note that our Reporting Values are all capitalized with underscores separating multiple words.

These reporting values have been customized to match identically with the Internal Values of the HubSpot Lead Status Property:

Radio select options		INTERNAL VALUE	CONTACTS WITH THIS...	SHOW IN FORMS
<input type="checkbox"/>	LABEL			
<input type="checkbox"/>	New	NEW	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Open	OPEN	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	In Progress	IN_PROGRESS	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Open Deal	OPEN_DEAL	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Unqualified	UNQUALIFIED	0	<input checked="" type="checkbox"/>

+ Add an option Load options...

Important! You can certainly customize both Alchemer Reporting Values as well as HubSpot's Internal Values. Just make sure that if you customize one, you update the other (if you intend to pass data from question to property or vice-versa).

FAQ & Troubleshooting

I'm using the Insert Push Method and a contact was not created.

Make sure that an email address was provided in your survey and that the email address was mapped to the Email HubSpot Property within your action. An email address is required to create a new contact record in HubSpot.

My HubSpot Action did not pull/push data .

If your HubSpot Action is failing to push or pull data, check the **Action Log** for any associated survey response.

1. Navigate to **Results > Individual Responses**, and click on one of the responses associated with a failed action.

Responses: 3
 Completes - 2 / Partial - 1 / Disqualified - 0 / Quarantined - 0 3 New!

<input type="checkbox"/>	ID	Status	Date Submitted	Email Address
<input type="checkbox"/>	3	New	Sep 1, 2017 10:44 AM	jim.smith@company.net
<input type="checkbox"/>	2	Partial New	Sep 1, 2017 9:26 AM	
<input type="checkbox"/>	1	New	Sep 1, 2017 8:25 AM	david@sgizmo.com

Select a Bulk Action ▼

- Access the **Action Log** tab and locate your HubSpot Action (identified by title). Here, you can view the action input/output and refer to any errors that might be presented. The error should provide clues as to why the action failed:

Response #3

Customize

Data

Details

Action Log

Data Quality

Need Help?

2. Contact Details

Pull Contact Information from HubSpot

HubSpot

Submitted: 2017-09-01 12:44:16

Input: Array ([email] => [firstname] => [lastname] => [jobtitle] => [nps] =>)

Output:

```

Array
(
    [0] => Array
        (
            [datetime] => 2017-09-01 12:43:50
            [output] => Client error: 507 https://api.hubapi.com/contacts/v1/contact/email/tes
{"status":"error","message":"contact does not exist","correlationId":"
        )
    [1] => Array
        (
            [datetime] => 2017-09-01 12:44:16
            [input] => Array
                (
                    [email] =>
                    [firstname] =>
                    [lastname] =>
                    [jobtitle] =>
                    [nps] =>
                )
            [output] =>
        )
    )

```

One of my fields did not pass data correctly.

This is likely due to a mismatch of field types, i.e. sending data from a Alchemer textbox question to a HubSpot Radio select property type.

I do not see the multiple checkboxes property in the integration dropdown menu.

At this time, the multiple checkboxes property is not supported with the Hubspot integration Pull and Push actions.

