How to Find and Return or Update a Salesforce Contact

> The Alchemer Salesforce Integration is available as an add-on. If you are interested in purchasing the Salesforce Integration, please contact us for additional information.
>
> If you have purchased the Salesforce Integration and are not seeing it in your account, don't hesitate to reach out.

At a high-level, Alchemer's integration with Salesforce allows you to easily:

- Push survey data from Alchemer into Salesforce to update contacts.
- Pull data from Salesforce contact records into Alchemer, for use in surveys or email campaigns.

What are some examples of the Alchemer Salesforce Integration in practice:

- Bring in data from Salesforce contact records to personalize surveys sent through Alchemer.
- Pull demographic information from Salesforce contact records to use for reporting purposes.
- Use Alchemer survey data to update Salesforce contact records.

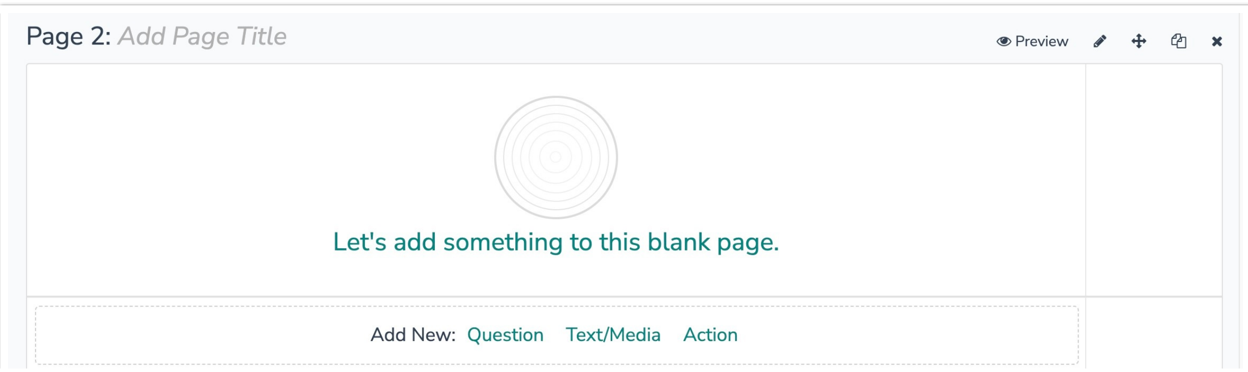
Integration Setup

Adding an Integration Action

1. Select an existing survey or create a new survey. Then navigate to the Survey Builder.

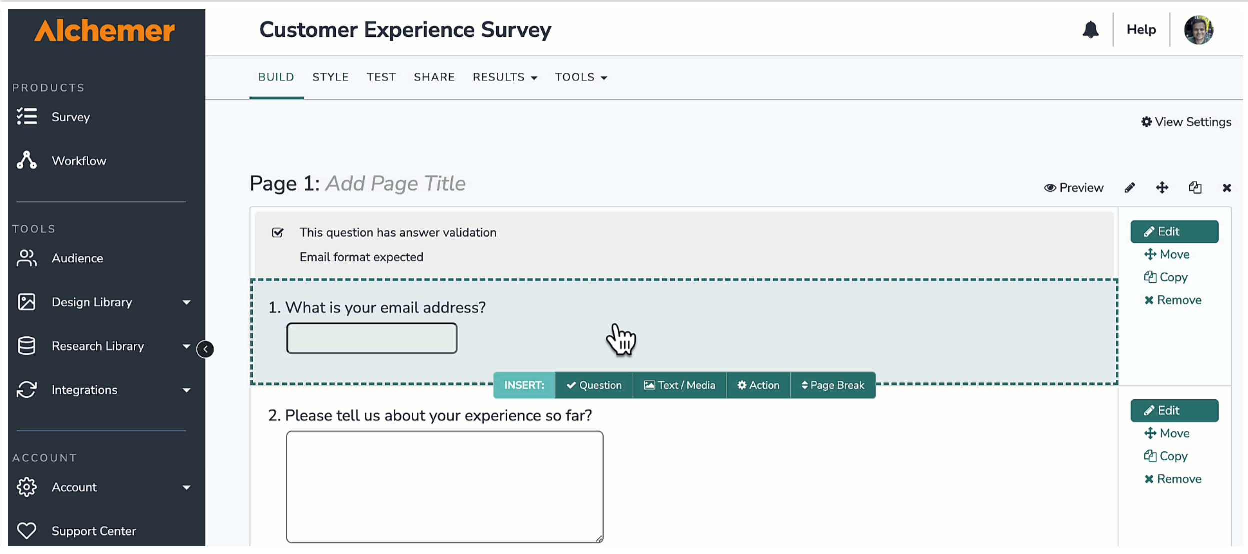
2. Click "Add New: Action"

> You cannot add this Integration Action to the first page of the survey.

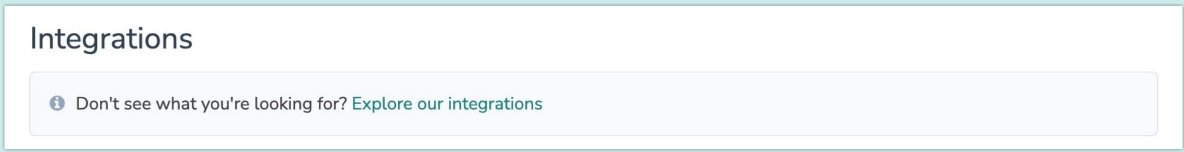


3. In the Add Action modal, scroll down to Integrations. Then click "Add" for one of your purchased

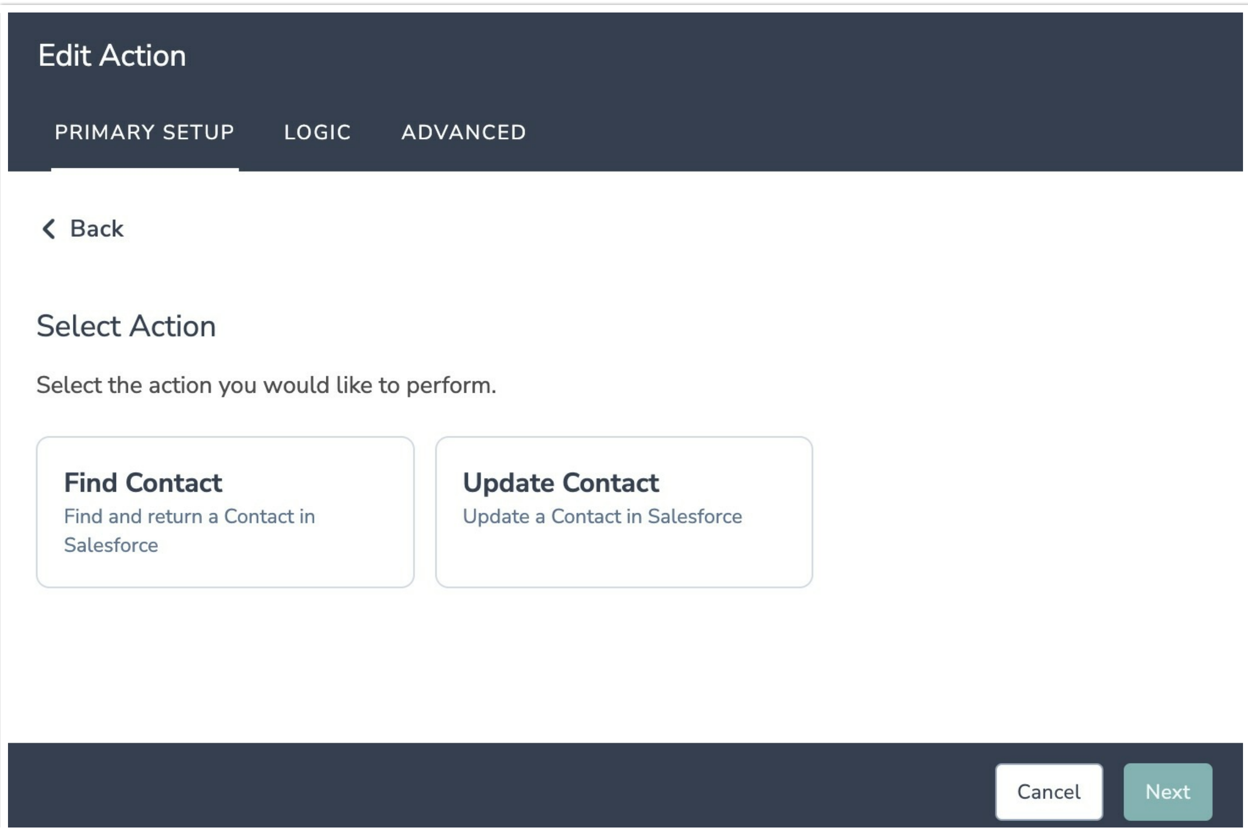
integrations.



If you haven't purchased any additional integrations, you will see the below screen:

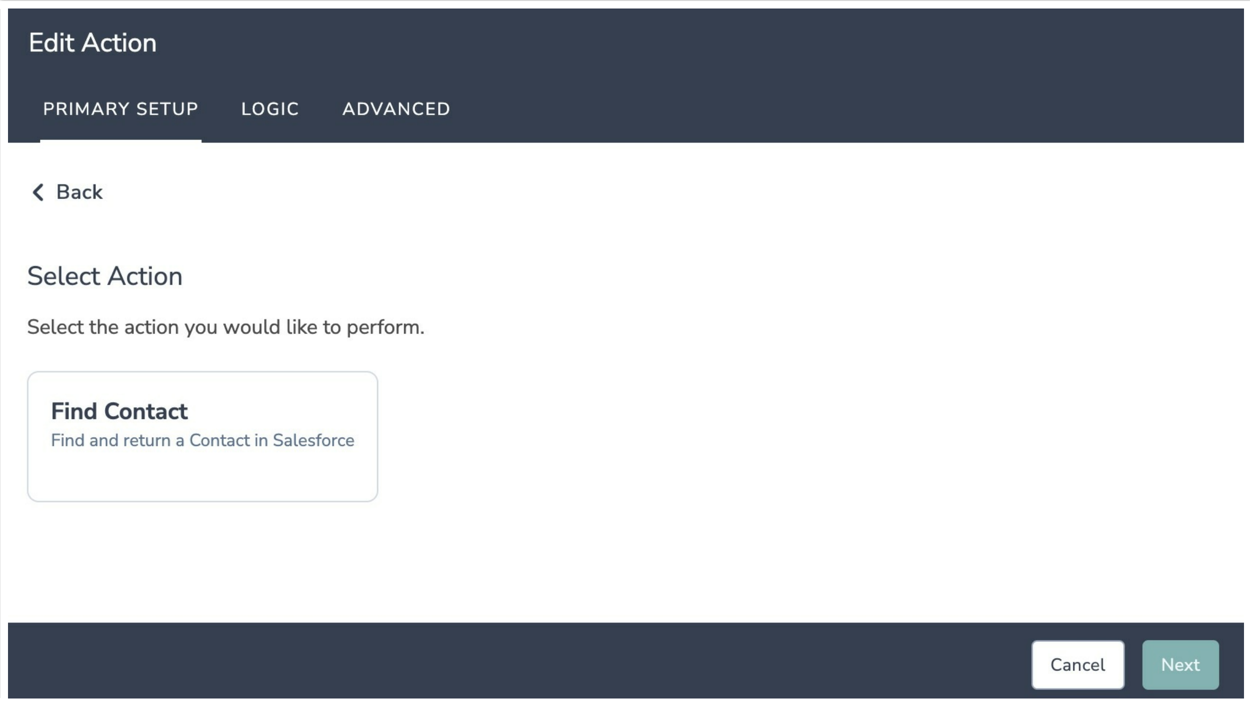


4. Select the action you would like to perform.

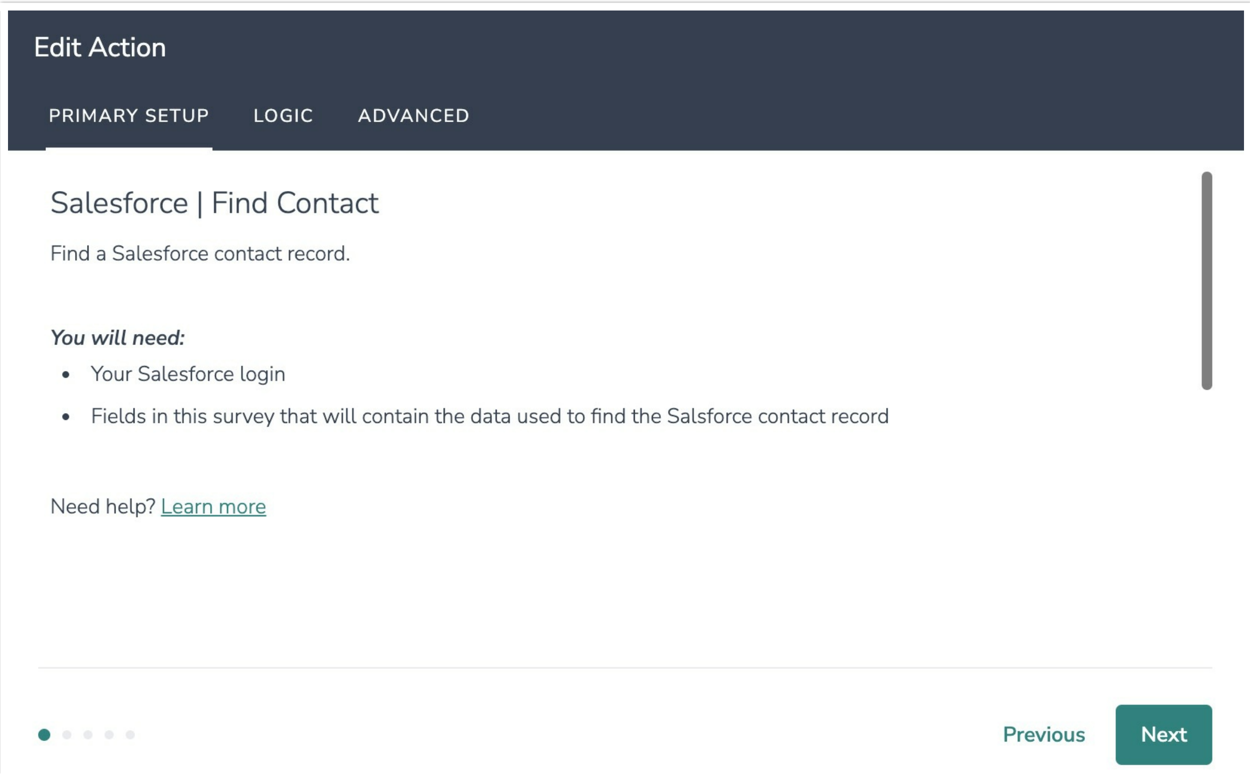


Configuration: Find Contact

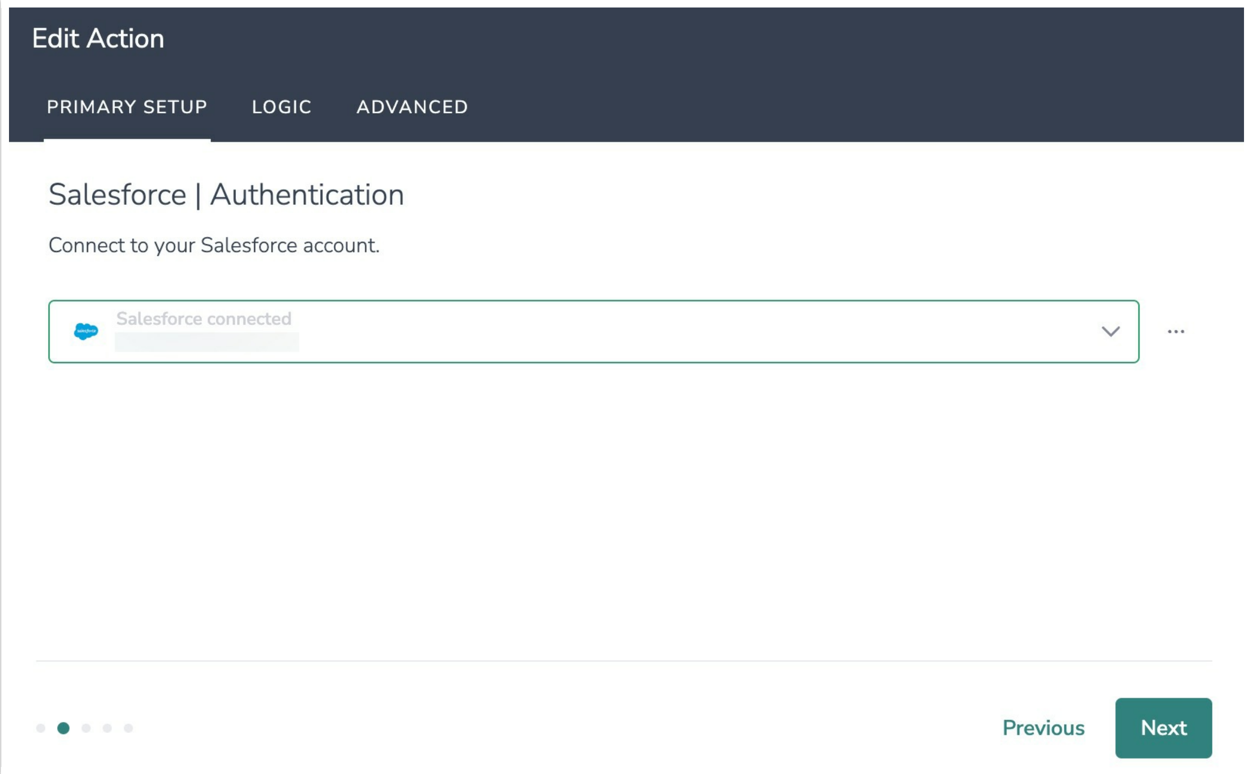
1. Select "Find Contact"



2. Hit next on the integration overview screen.



3. Connect your Salesforce account.

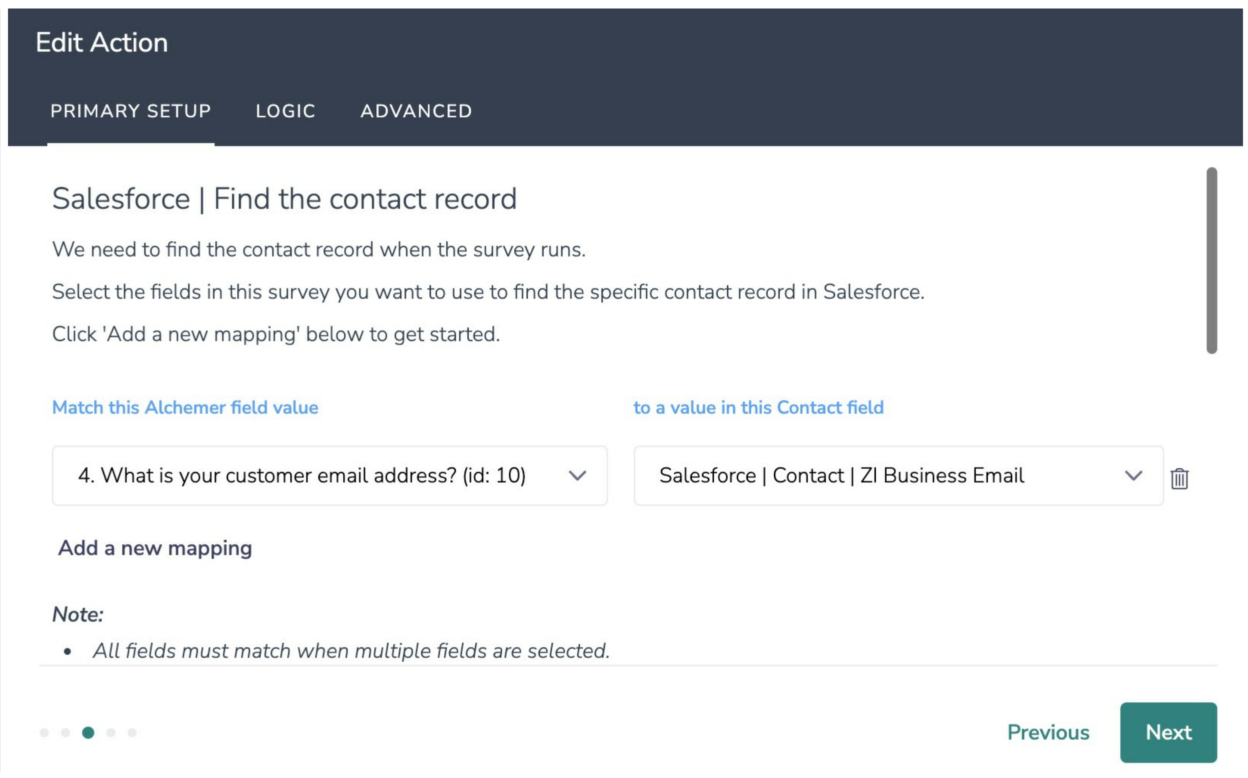


4. Select the fields in this survey you want to use to find the specific contact record in Salesforce.

When mapping fields keep in mind:

1. **All fields must match when multiple fields are selected.** For example, if you are using last name and email address to find a contact record, both provided values must match in Alchemer and Salesforce.

2. **The most recently created record is returned when more than one match is found.** For example, if there multiple contacts using the same email address in Salesforce, only the most recently created contact will be returned.

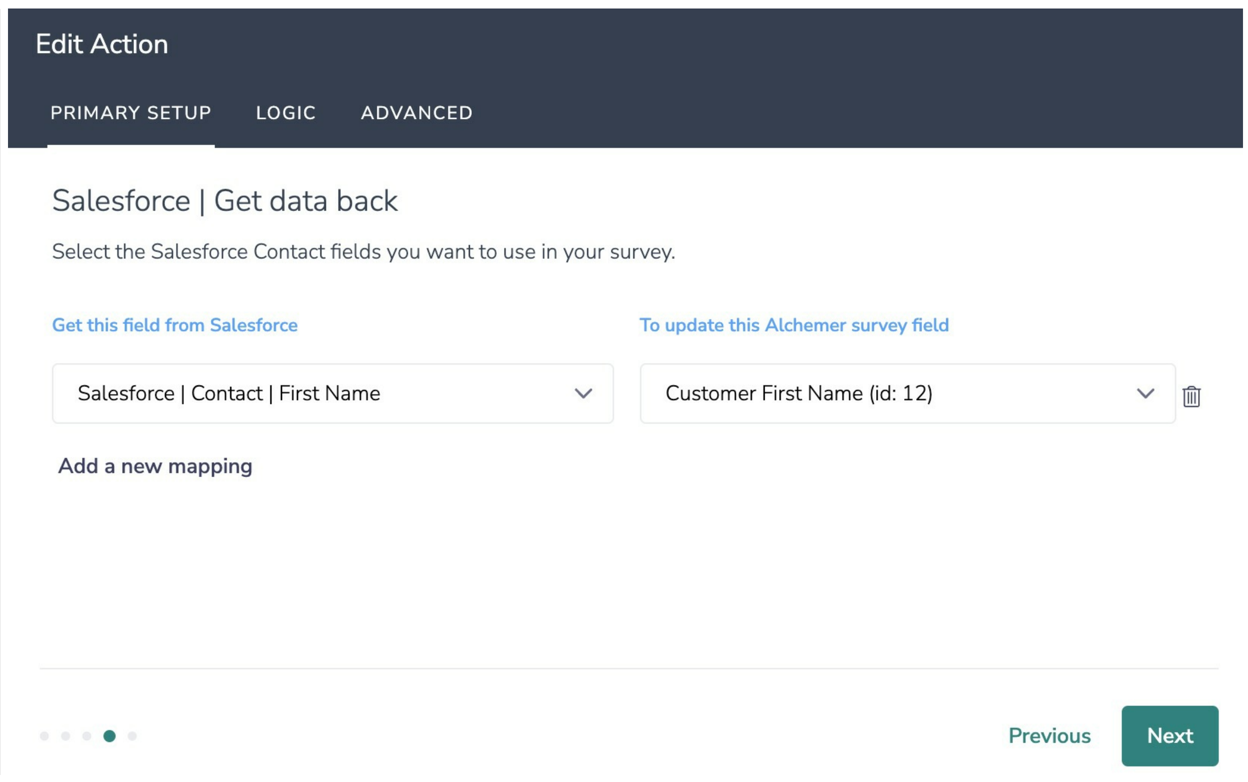


How to Create Fields in Alchemer

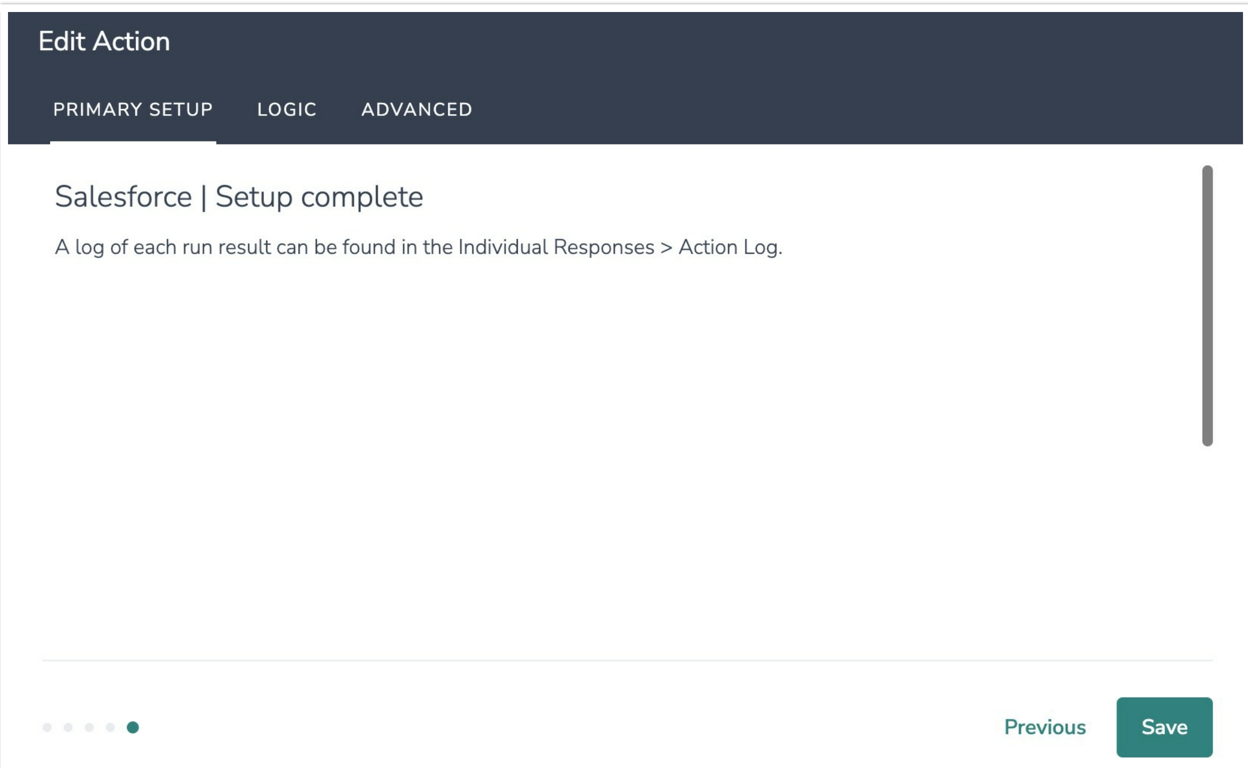
1. Add survey questions that when answered will provide the desired field. (Example: What is the customer email address?)

2. Create a container using a Hidden Value. These Hidden Values can then be mapped to fields in Salesforce and used as Merge Codes in your survey.

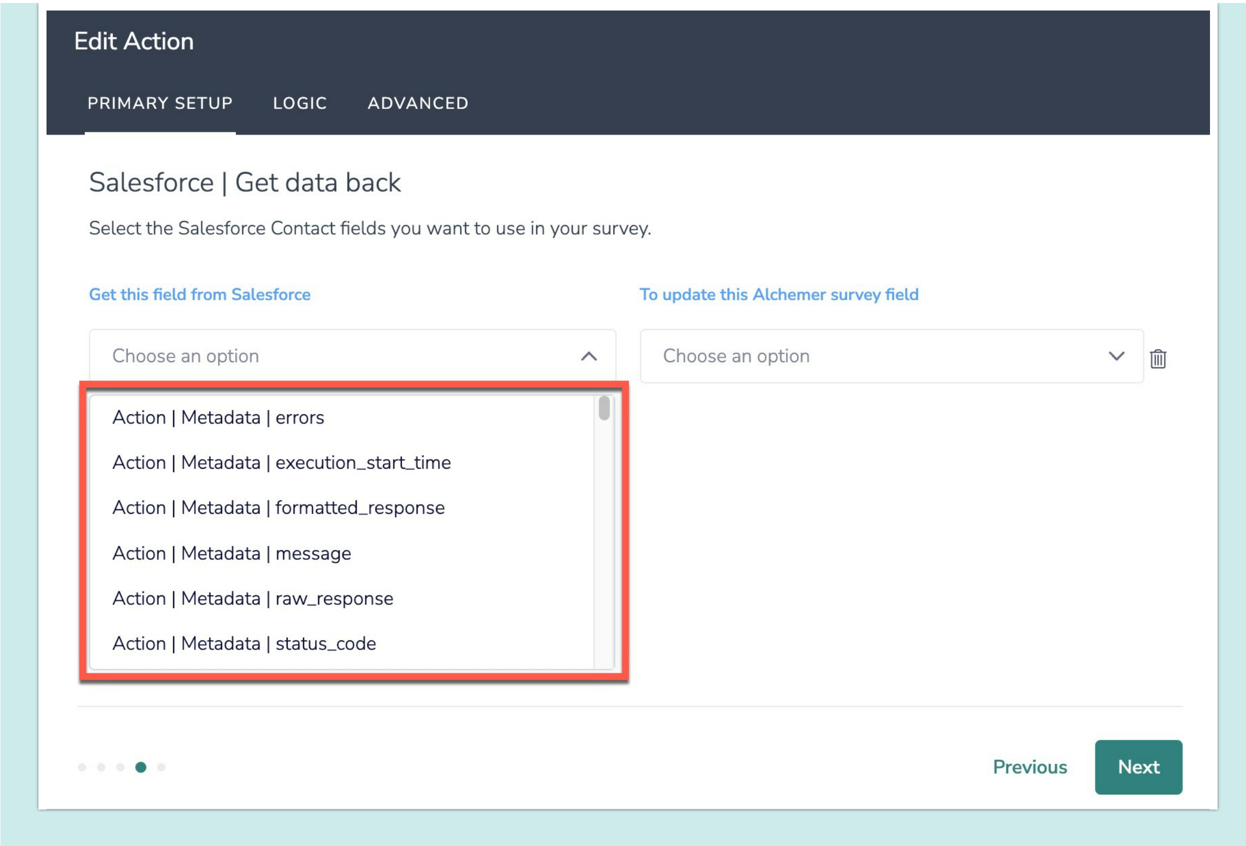
5. Select the Salesforce Contact fields you want to use in your survey.



6. Click "Save".

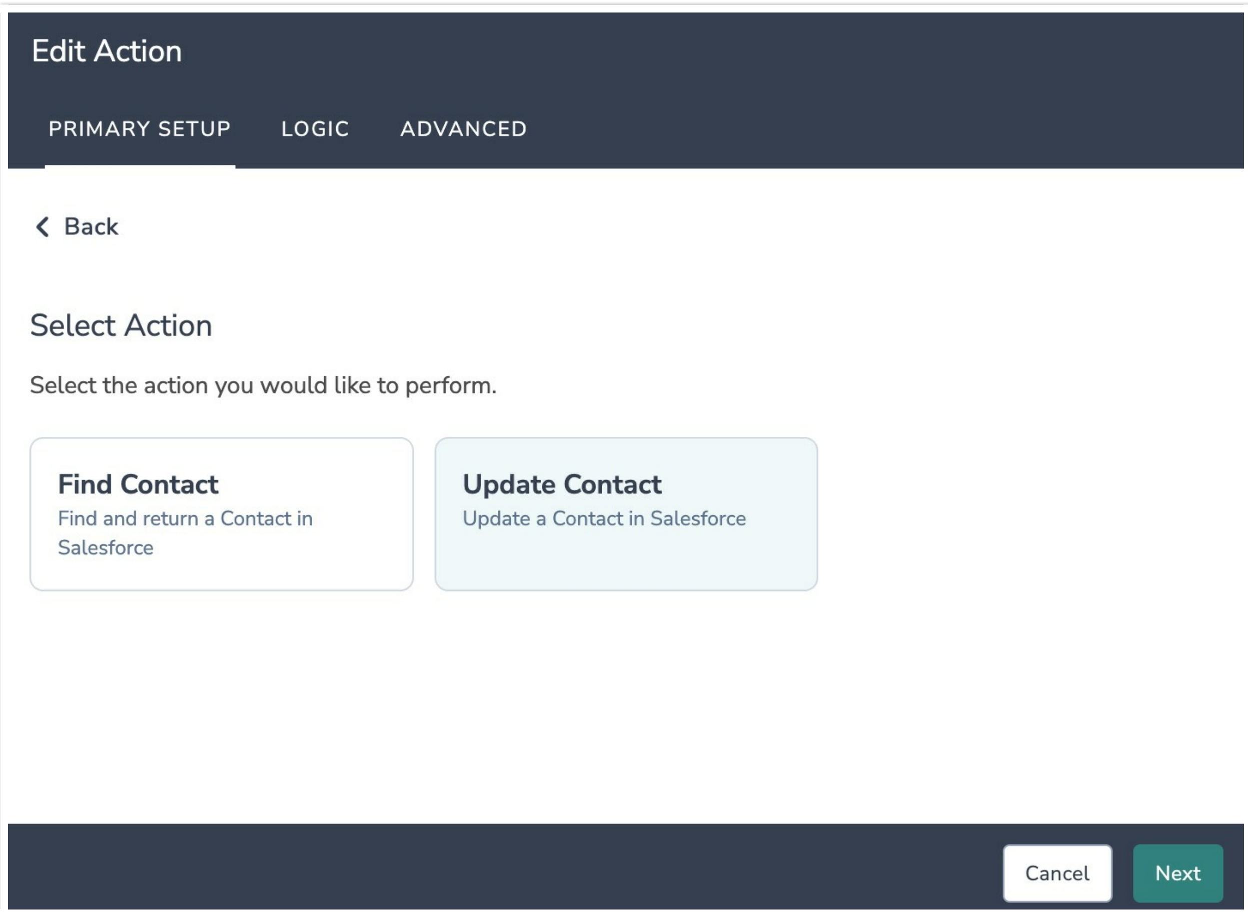


Advanced Functionality (Optional)
After a Salesforce Find Contact action occurs, data about the action is available for use in your survey. You can map this data back to fields in Alchemer. These fields are intended to be used with custom scripts or to provide more details on what exactly the query returned.

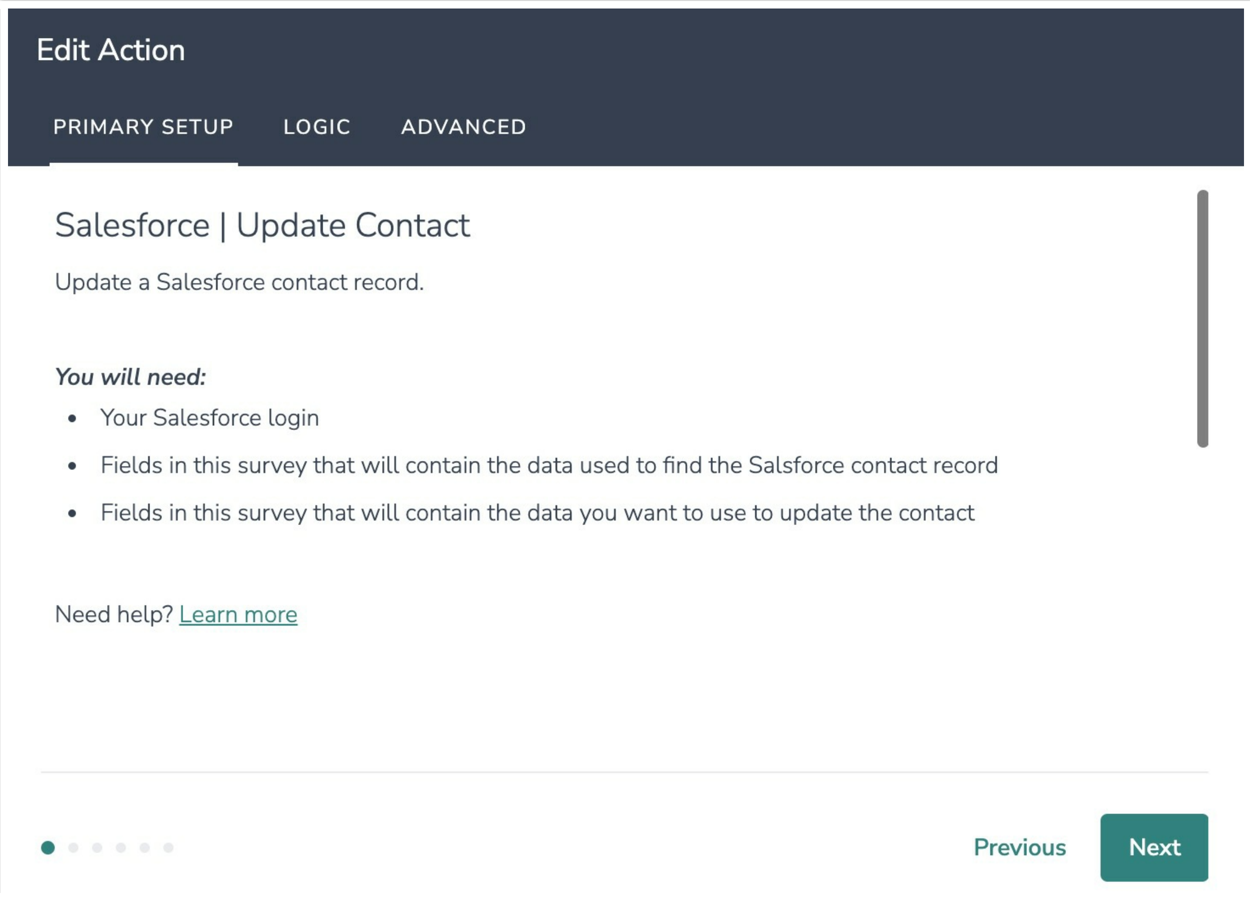


Configuration: Update Contact

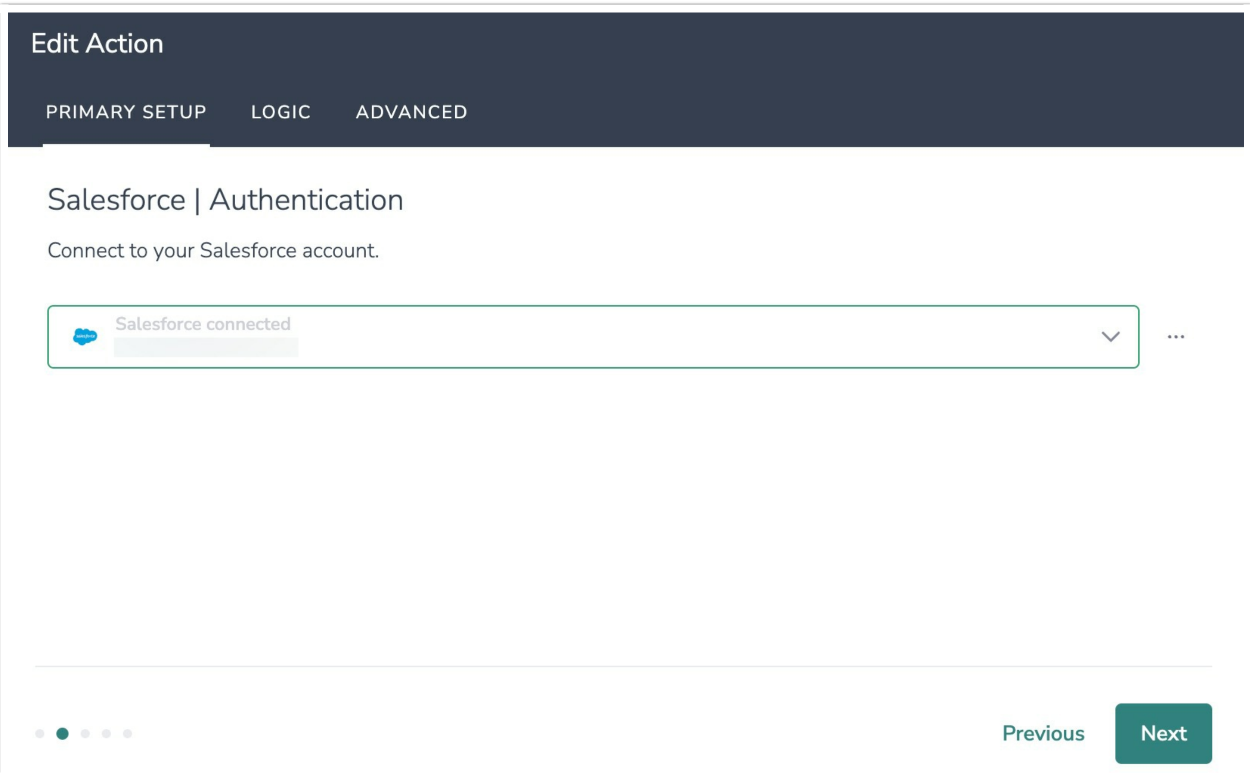
1. Select "Update Contact".



2. Hit next on the integration overview screen.



3. Connect your Salesforce account.



4. Select the fields in this survey you want to use to find the specific contact record in Salesforce.

When mapping fields keep in mind:

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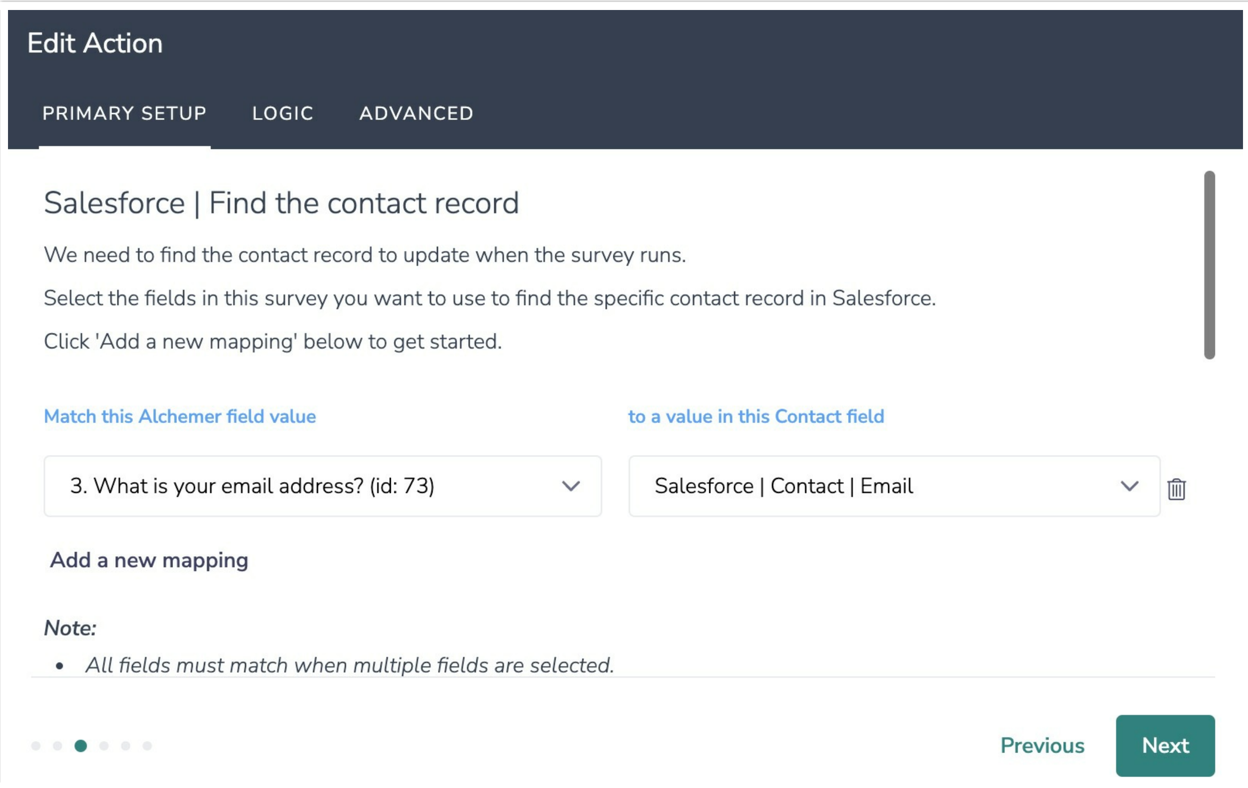


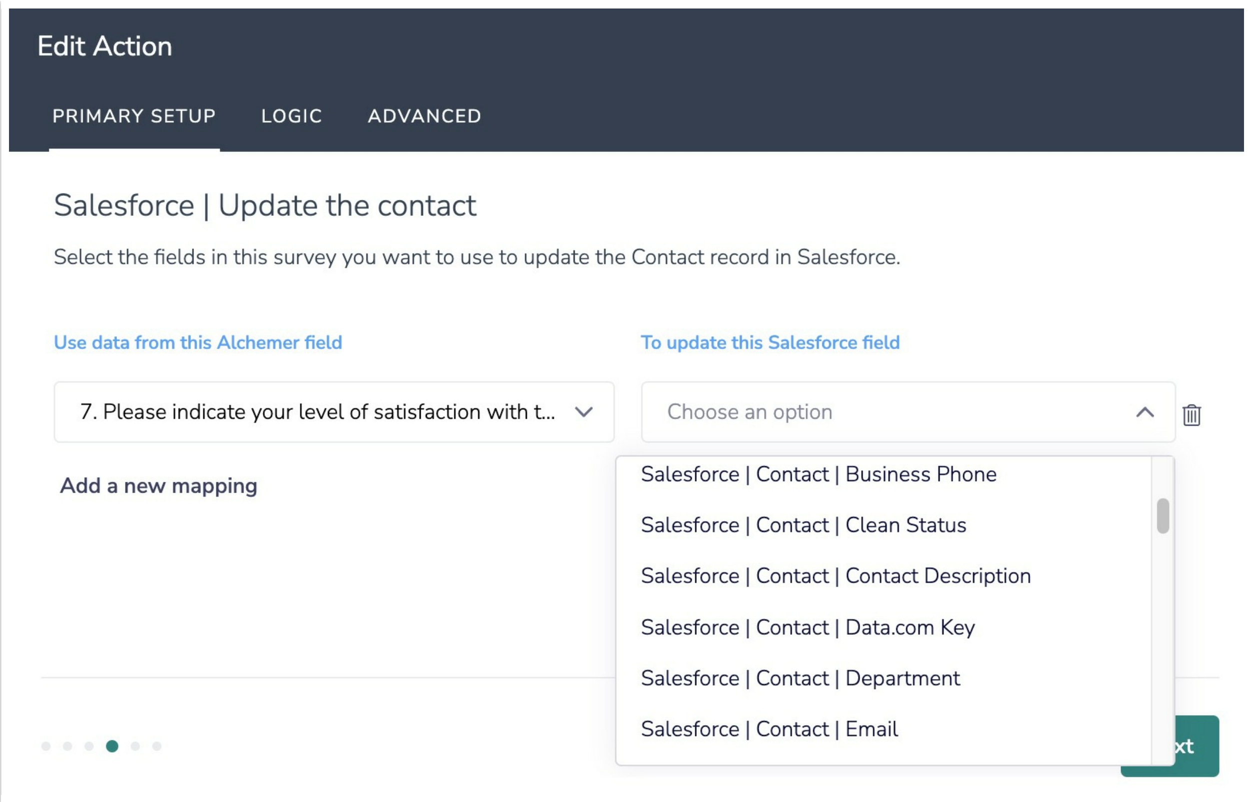
5. Map fields in Alchemer to corresponding fields in Salesforce.

For **Update Salesforce Customer Records**, you will map a survey field in Alchemer to a corresponding field in Salesforce. This will push the data from that survey field into Salesforce and update the corresponding field for that customer record.

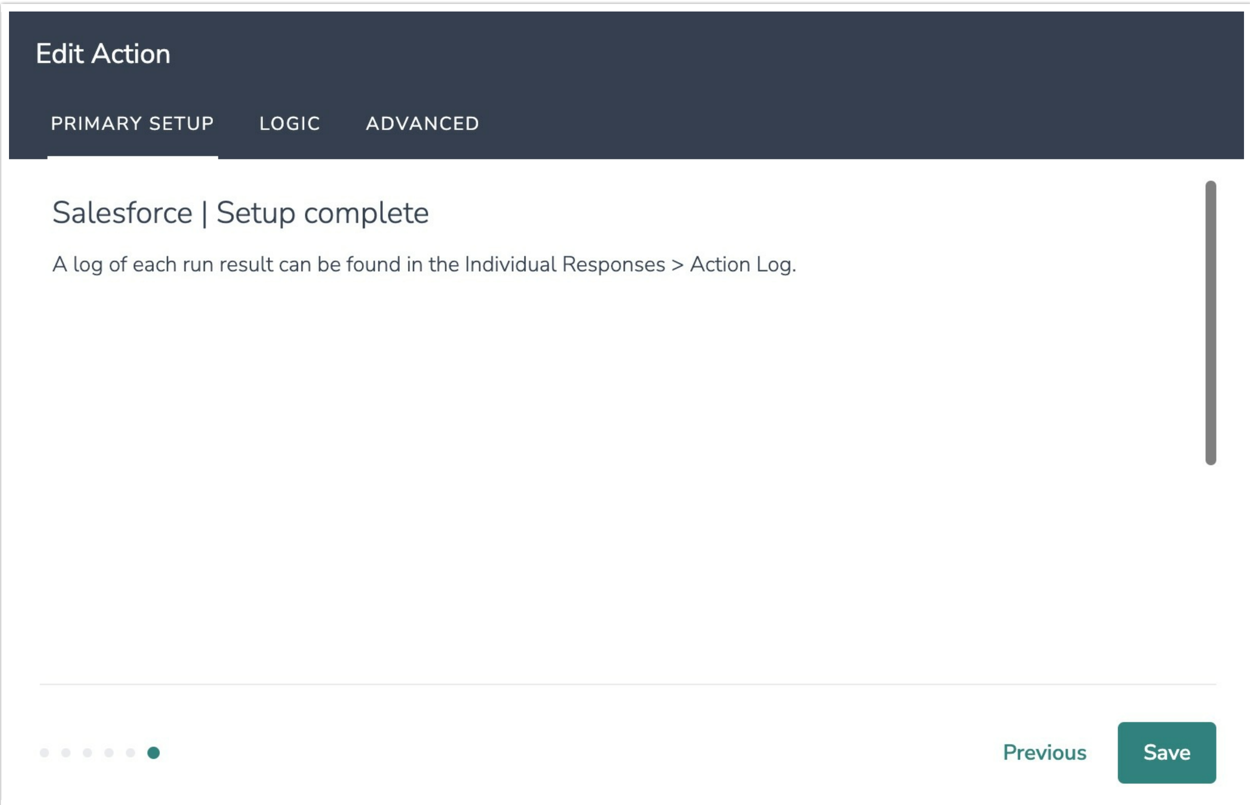
How to Create Fields in Alchemer

1. Add survey questions that when answered will provide the desired field. (Example: What is the customer email address?)

2. Create a container using a Hidden Value. These Hidden Values can then be mapped to fields in Salesforce and used as Merge Codes in your survey.

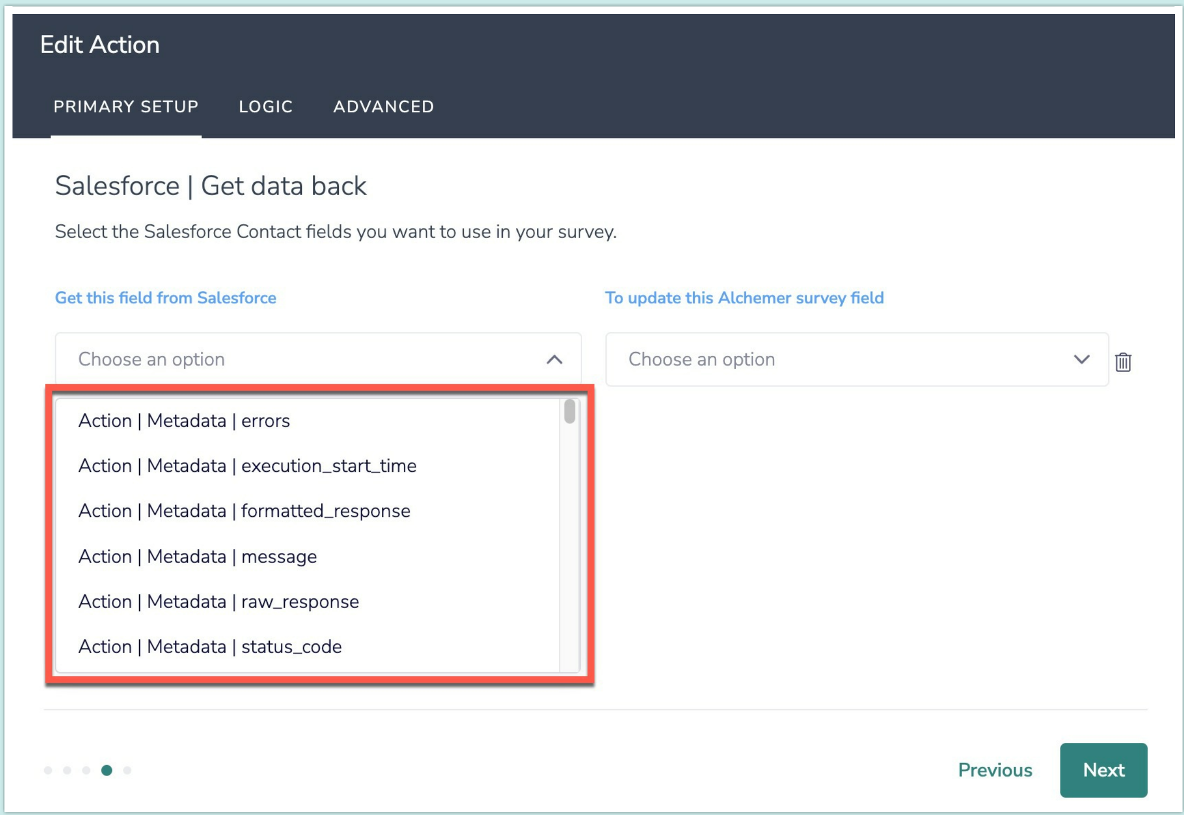


6. Click "Save".



Advanced Functionality (Optional)

After a Salesforce Update Contact action occurs, data about the action is available for use in your survey. You can map this data back to fields in Alchemer. These fields are intended to be used with custom scripts or to provide more details on what exactly the query returned.



Monitoring a Salesforce Integration Action

A log of each run result can be found in Results > Individual Responses > Action Log.

Select an individual response and then navigate to the Action Log. In the Action Log you can monitor if the action was successful or not.

FAQs

▸ What permissions do I need within Alchemer to set-up and use the Salesforce integration?

▸ This integration doesn't fit my use cases, or I want to provide feedback to Alchemer!

Related Articles