

Salesforce Integration for Alchemer Survey

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:

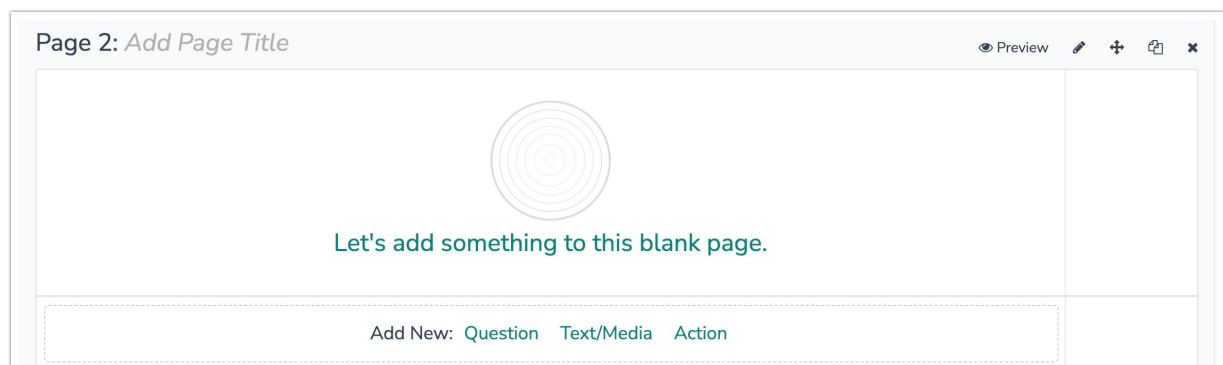
- Bring in data from Salesforce contact records to personalize surveys sent through Alchemer.
- Pull demographic information from Salesforce contact records to use for reporting purposes.
- Use Alchemer survey data to update Salesforce contact records.

Integration Setup

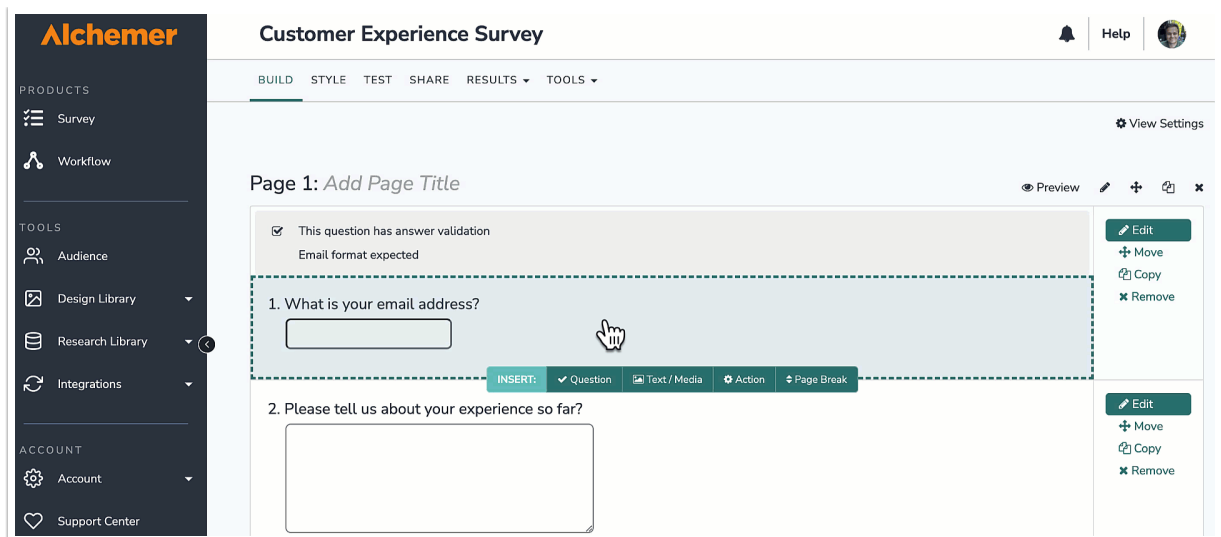
Adding an Integration Action

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.



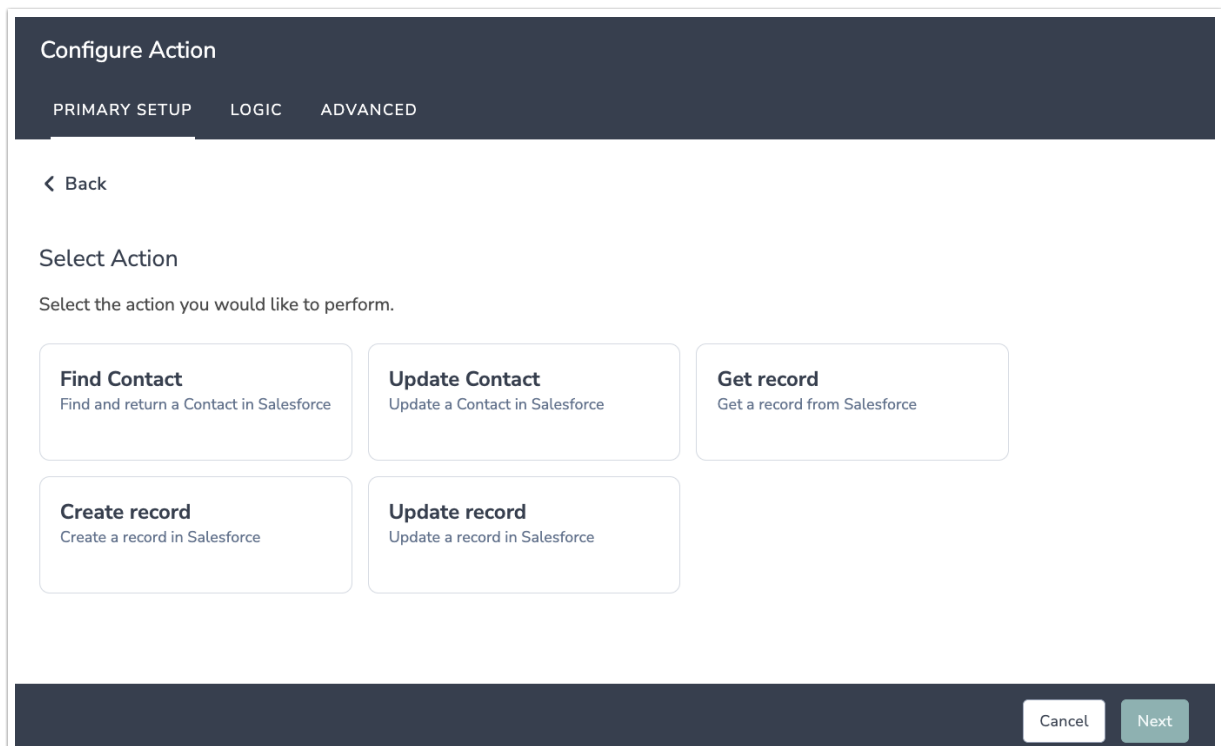
3. In the Add Action modal, scroll down to Integrations. Then click "Add" for one of your purchased integrations.



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"

Configure Action

PRIMARY SETUPLOGICADVANCED

[← Back](#)

Select Action

Select the action you would like to perform.

Find Contact
Find and return a Contact in Salesforce

Update Contact
Update a Contact in Salesforce

Get record
Get a record from Salesforce

Create record
Create a record in Salesforce

Update record
Update a record in Salesforce

[Cancel](#)[Next](#)

2. Hit next on the integration overview screen.

Edit Action

PRIMARY SETUPLOGICADVANCED

Salesforce | Find Contact

Find a Salesforce contact record.

You will need:

- Your Salesforce login
- Fields in this survey that will contain the data used to find the Salsforce contact record

Need help? [Learn more](#)

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3. Connect your Salesforce account.

Edit Action

PRIMARY SETUPLOGICADVANCED

Salesforce | Authentication

Connect to your Salesforce account.

 Salesforce connected

▼

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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.

Edit Action

PRIMARY SETUP

LOGIC

ADVANCED

Salesforce | Find the contact record

We need to find the contact record when the survey runs.

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

Click 'Add a new mapping' below to get started.

Match this Alchemer field value

to a value in this Contact field

4. What is your customer email address? (id: 10) ▼

Salesforce | Contact | ZI Business Email ▼



Add a new mapping

Note:

- All fields must match when multiple fields are selected.



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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.

Edit Action

PRIMARY SETUP

LOGIC

ADVANCED

Salesforce | Get data back

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

Get this field from Salesforce

To update this Alchemer survey field

Salesforce | Contact | First Name ▼

Customer First Name (id: 12) ▼



Add a new mapping



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6. Click "Save".

Edit Action

PRIMARY SETUPLOGICADVANCED

Salesforce | Setup complete

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

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.

Edit Action

PRIMARY SETUPLOGICADVANCED

Salesforce | Get data back

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

Get this field from Salesforce

Choose an option

Action | Metadata | errors

Action | Metadata | execution_start_time

Action | Metadata | formatted_response

Action | Metadata | message

Action | Metadata | raw_response

Action | Metadata | status_code

To update this Alchemer survey field

Choose an option

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Configuration: Update Contact

1. Select "Update Contact".

Configure Action

PRIMARY SETUPLOGICADVANCED

[← Back](#)

Select Action

Select the action you would like to perform.

Find Contact
Find and return a Contact in Salesforce

Update Contact
Update a Contact in Salesforce

Get record
Get a record from Salesforce

Create record
Create a record in Salesforce

Update record
Update a record in Salesforce

[Cancel](#) [Next](#)

2. Hit next on the integration overview screen.

Edit Action

PRIMARY SETUPLOGICADVANCED

Salesforce | Update Contact

Update a Salesforce contact record.

You will need:

- Your Salesforce login
- Fields in this survey that will contain the data used to find the Salsforce contact record
- Fields in this survey that will contain the data you want to use to update the contact

Need help? [Learn more](#)

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3. Connect your Salesforce account.

Edit Action

PRIMARY SETUPLOGICADVANCED

Salesforce | Authentication

Connect to your Salesforce account.

 Salesforce connected

▼

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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.

Edit Action

PRIMARY SETUPLOGICADVANCED

Salesforce | Find the contact record

We need to find the contact record to update when the survey runs.


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

Click 'Add a new mapping' below to get started.

Match this Alchemer field value

to a value in this Contact field

3. What is your email address? (id: 73)▼

Salesforce | Contact | Email▼

Add a new mapping

Note:

- All fields must match when multiple fields are selected.

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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.

Edit Action
PRIMARY SETUP
LOGIC
ADVANCED

Salesforce | Update the contact

Select the fields in this survey you want to use to update the Contact record in Salesforce.

Use data from this Alchemer field
7. Please indicate your level of satisfaction with t...

To update this Salesforce field
Choose an option

- Salesforce | Contact | Business Phone
- Salesforce | Contact | Clean Status
- Salesforce | Contact | Contact Description
- Salesforce | Contact | Data.com Key
- Salesforce | Contact | Department
- Salesforce | Contact | Email

Add a new mapping

6. Click "Save".

Edit Action
PRIMARY SETUP
LOGIC
ADVANCED

Salesforce | Setup complete

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

Previous
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.

Edit Action

PRIMARY SETUPLOGICADVANCED

Salesforce | Get data back

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

Get this field from Salesforce

To update this Alchemer survey field

Choose an option

Choose an option

Action | Metadata | errors

Action | Metadata | execution_start_time

Action | Metadata | formatted_response

Action | Metadata | message

Action | Metadata | raw_response

Action | Metadata | status_code

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Configuration: Get record

You will need:

- To authenticate with Salesforce
- Fields in this survey used to find the record
- Fields in this survey where you can save the record information

1. Select "Get record".

Configure Action

PRIMARY SETUPLOGICADVANCED

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Select Action

Select the action you would like to perform.

Find Contact

Find and return a Contact in Salesforce

Update Contact

Update a Contact in Salesforce

Get record

Get a record from Salesforce

Create record

Create a record in Salesforce

Update record

Update a record in Salesforce

Cancel

Next


2. Connect your Salesforce account.

Edit Action

PRIMARY SETUPLOGICADVANCED

Salesforce | Authentication

Connect to your Salesforce account.

 Salesforce connected

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3. Enter your Salesforce Domain. 

4. Select the Salesforce object type.

Configure Action

PRIMARY SETUPLOGICADVANCED

Salesforce | Select object

Select the Salesforce object type

Select object*

Contact

5. Select the fields in this survey that contain the values you want to use to find the specific record in Salesforce.

Configure Action

PRIMARY SETUPLOGICADVANCED

Salesforce | Find record

Select the fields in this survey that contain the values you want to use to find the specific record in Salesforce

If you select more than one field they are combined with the AND operator

Use this Alchemer field value

to match this Salesforce field

Question | 1. Input (id: 2)

Salesforce | FirstName

Add a new mapping

6. Select the fields you want to get back.

Configure Action

PRIMARY SETUPLOGICADVANCED

Salesforce | Get data back

Select the fields you want to get back

Use this Salesforce field

To update this Alchemer survey field

Action | Metadata | message

Question | 3. Output (id: 4)

Add a new mapping

7. Click save.

Configure Action

PRIMARY SETUPLOGICADVANCED

Salesforce | Setup complete

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

A status code is available in the action metadata:
200: A single record was successfully found
201: Query ran successfully, but no records were found
202: More than one record was found. The first record is used for the values returned to Alchemer
400: The external integration returned an error

Configuration: Create record

You will need:

- To authenticate with Salesforce
- Fields in this survey used to create the record information

1. Select "Get record".

Configure Action

PRIMARY SETUPLOGICADVANCED

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Select Action

Select the action you would like to perform.

Find Contact
Find and return a Contact in Salesforce

Update Contact
Update a Contact in Salesforce

Get record
Get a record from Salesforce

Create record
Create a record in Salesforce

Update record
Update a record in Salesforce

Cancel

Next


2. Connect your Salesforce account.

Edit Action

PRIMARY SETUPLOGICADVANCED

Salesforce | Authentication

Connect to your Salesforce account.

 Salesforce connected

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3. Enter your Salesforce Domain.

Configure Action

PRIMARY SETUPLOGICADVANCED

Salesforce | My Domain

Enter your Salesforce My Domain

Salesforce My Domain*

yourcompanyname

Your Salesforce My Domain is a custom, branded subdomain for your Salesforce org e.g. ([https:// yourcompanyname .my.salesforce.com](https://yourcompanyname.my.salesforce.com))

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4. Select the Salesforce object type.

Configure Action

PRIMARY SETUPLOGICADVANCED

Salesforce | Select object

Select the Salesforce object type

Select object*

Contact

5. Select the fields in this survey that contain the values you want to use to create the specific record in Salesforce.

Configure Action
PRIMARY SETUP
LOGIC
ADVANCED

Salesforce | Create record
Select the fields in this survey that contain the values you want to use to create the specific record in Salesforce

Use this Alchemer field value

to create this Salesforce field

Question | 1. Input (id: 2)

Salesforce | FirstName

Question | 2. Update (id: 3)

Salesforce | LastName

Add a new mapping

Data prep options*

Strip HTML tags from inputs

6. Select the fields you want to get back.

Configure Action
PRIMARY SETUP
LOGIC
ADVANCED

Salesforce | Get data back
Select the fields you want to get back

Use this Salesforce field

To update this Alchemer survey field

Action | Metadata | message

Question | 3. Output (id: 4)

Add a new mapping

7. Click save.

Configure Action
PRIMARY SETUP
LOGIC
ADVANCED

Salesforce | Setup complete
A log of each run result can be found in the Individual Responses > Action Log.

A status code is available in the action metadata:
200: A single record was successfully found
201: Query ran successfully, but no records were found
202: More than one record was found. The first record is used for the values returned to Alchemer
400: The external integration returned an error

Configuration: Update record

You will need:

- To authenticate with Salesforce
- Fields in this survey used to update the record information

1. Select "Update record".

The screenshot shows a 'Configure Action' window with a dark header bar containing the title and three tabs: 'PRIMARY SETUP', 'LOGIC', and 'ADVANCED'. Below the header, there is a 'Back' button with a left arrow. The main section is titled 'Select Action' and includes the instruction 'Select the action you would like to perform.' Five action cards are displayed in a grid. The 'Update record' card is highlighted with a light blue background. At the bottom right, there are 'Cancel' and 'Next' buttons.

Configure Action		
PRIMARY SETUP	LOGIC	ADVANCED
← Back		
Select Action Select the action you would like to perform.		
Find Contact Find and return a Contact in Salesforce	Update Contact Update a Contact in Salesforce	Get record Get a record from Salesforce
Create record Create a record in Salesforce	Update record Update a record in Salesforce	
		Cancel Next

2. Connect your Salesforce account.

Edit Action

PRIMARY SETUPLOGICADVANCED

Salesforce | Authentication

Connect to your Salesforce account.

Salesforce connected

▼

...

PreviousNext

3. Enter your Salesforce Domain.

Configure Action

PRIMARY SETUPLOGICADVANCED

Salesforce | My Domain

Enter your Salesforce My Domain

Salesforce My Domain*

yourcompanyname

Your Salesforce My Domain is a custom, branded subdomain for your Salesforce org e.g. (<https://yourcompanyname.my.salesforce.com>)

PreviousNext

4. Select the Salesforce object type.

Configure Action

PRIMARY SETUPLOGICADVANCED

Salesforce | Select object

Select the Salesforce object type

Select object*

Contact

5. Select the fields in this survey that contain the values you want to use to find the specific record in Salesforce.

Configure Action

PRIMARY SETUPLOGICADVANCED

Salesforce | Find record

Select the fields in this survey that contain the values you want to use to find the specific record in Salesforce

If you select more than one field they are combined with the AND operator

Use this Alchemer field value

to match this Salesforce field

Question | 1. Input (id: 2)

Salesforce | FirstName

Add a new mapping

6. Select the fields in this survey that contain the values you want to use to update the specific record in Salesforce.

Configure Action

PRIMARY SETUPLOGICADVANCED

Salesforce | Update record

Select the fields in this survey that contain the values you want to use to update the specific record in Salesforce

Use this Alchemer field value

to update this Salesforce field

Question | 2. Update (id: 3)

Salesforce | LastName

Add a new mapping

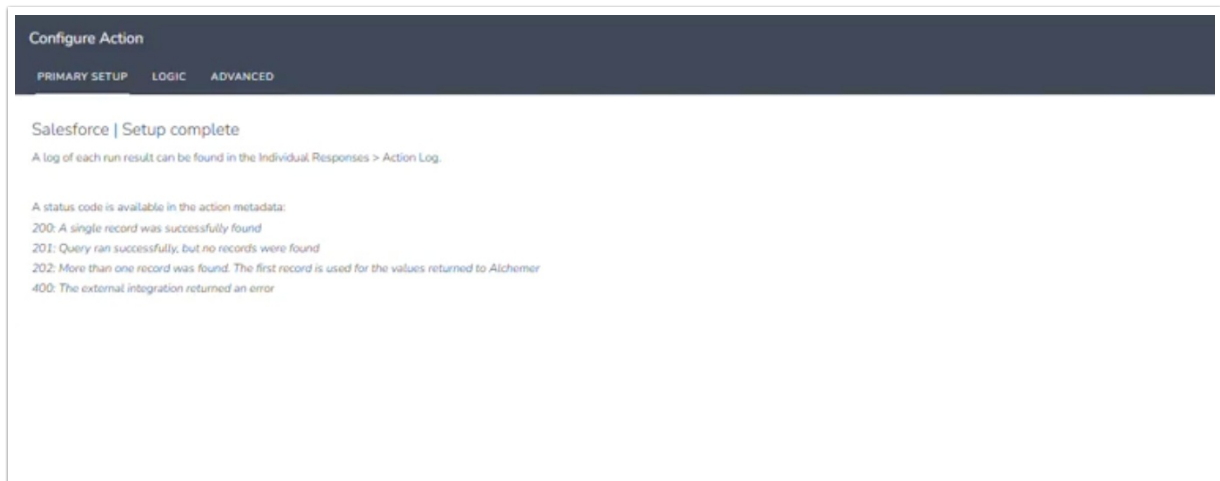
Data prep options*

Strip HTML tags from inputs

7. Select the fields you want to get back.



8. Click save.



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