

# 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:

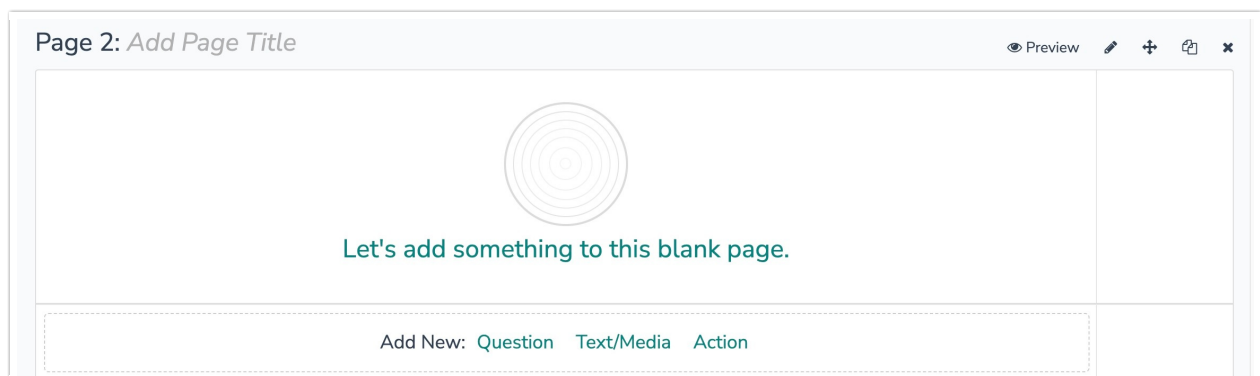
- Bring in data from Salesforce contact records to personalize surveys sent through Alchemer.
- Pull demographic information from Salesforce contact records to use for reporting purposes.
- Use Alchemer survey data to update Salesforce contact records.

## 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.

The screenshot shows the Alchemer Customer Experience Survey editor. The top navigation bar includes 'BUILD', 'STYLE', 'TEST', 'SHARE', 'RESULTS', and 'TOOLS'. The left sidebar lists 'PRODUCTS' (Survey, Workflow) and 'TOOLS' (Audience, Design Library, Research Library, Integrations). The main workspace is titled 'Page 1: Add Page Title' and contains two questions. The first question is '1. What is your email address?' with a text input field and a validation message: 'This question has answer validation. Email format expected'. A dashed green box highlights the question area, and a hand cursor is over the input field. An 'INSERT' menu is open below the question, showing options for 'Question', 'Text / Media', 'Action', and 'Page Break'. The second question is '2. Please tell us about your experience so far?' with a text area. On the right, there are 'Edit', 'Move', 'Copy', and 'Remove' options for each question.

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

The screenshot shows the 'Integrations' screen. It features a header 'Integrations' and a message: 'Don't see what you're looking for? Explore our integrations' with an information icon and a link.

4. Select the action you would like to perform.

The screenshot shows the 'Edit Action' dialog box. It has a dark header with 'Edit Action' and three tabs: 'PRIMARY SETUP', 'LOGIC', and 'ADVANCED'. Below the header is a 'Back' button. The main content area is titled 'Select Action' and contains the instruction 'Select the action you would like to perform.' There are two action cards: 'Find Contact' (Find and return a Contact in Salesforce) and 'Update Contact' (Update a Contact in Salesforce). At the bottom, there are 'Cancel' and 'Next' buttons.

# Configuration: Find Contact

1. Select "Find Contact"

The screenshot shows the 'Edit Action' configuration interface. At the top, there is a dark blue header with the title 'Edit Action' and three tabs: 'PRIMARY SETUP', 'LOGIC', and 'ADVANCED'. Below the header, there is a back arrow and the text '< Back'. The main content area is titled 'Select Action' and contains the instruction 'Select the action you would like to perform.' A single action card is visible, titled 'Find Contact' with the description 'Find and return a Contact in Salesforce'. At the bottom right, there are two buttons: 'Cancel' and 'Next'.

2. Hit next on the integration overview screen.

The screenshot shows the 'Edit Action' configuration interface for 'Salesforce | Find Contact'. The header is dark blue with the title 'Edit Action' and tabs for 'PRIMARY SETUP', 'LOGIC', and 'ADVANCED'. The main content area is titled 'Salesforce | Find Contact' and contains the description 'Find a Salesforce contact record.' Below this, there is a section titled 'You will need:' followed by a bulleted list: 'Your Salesforce login' and 'Fields in this survey that will contain the data used to find the Salsforce contact record'. A link 'Need help? [Learn more](#)' is provided. At the bottom left, there are four dots, with the first one filled. At the bottom right, there are two buttons: 'Previous' and 'Next'.

3. Connect your Salesforce account.

## Edit Action

PRIMARY SETUP LOGIC ADVANCED

### Salesforce | Authentication

Connect to your Salesforce account.

Salesforce connected

Previous **Next**

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.



Previous

Next

### 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)
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Add a new mapping

Previous Next

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 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 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

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

Previous Next

## Configuration: Update Contact

1. Select "Update Contact".

**Edit 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

Cancel Next

2. Hit next on the integration overview screen.

The screenshot shows the 'Edit Action' configuration screen for 'Salesforce | Update Contact'. The top navigation bar includes 'PRIMARY SETUP', 'LOGIC', and 'ADVANCED'. The main heading is 'Salesforce | Update Contact' with the subtext 'Update a Salesforce contact record.' Below this, a section titled 'You will need:' lists three requirements: 'Your Salesforce login', 'Fields in this survey that will contain the data used to find the Salesforce contact record', and 'Fields in this survey that will contain the data you want to use to update the contact'. A link for 'Need help? Learn more' is provided. At the bottom, there are five progress dots (the first is filled) and 'Previous' and 'Next' buttons.

3. Connect your Salesforce account.

The screenshot shows the 'Edit Action' configuration screen for 'Salesforce | Authentication'. The top navigation bar includes 'PRIMARY SETUP', 'LOGIC', and 'ADVANCED'. The main heading is 'Salesforce | Authentication' with the subtext 'Connect to your Salesforce account.' Below this, a dropdown menu shows 'Salesforce connected' with a blue Salesforce logo and a dropdown arrow. At the bottom, there are five progress dots (the first is filled) and 'Previous' and 'Next' buttons.

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 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) <span style="float: right;">▼</span>	Salesforce   Contact   Email <span style="float: right;">▼</span>	
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[Add a new mapping](#)

**Note:**

- All fields must match when multiple fields are selected.

[Previous](#) [Next](#)

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** **To update this Salesforce field**

7. Please indicate your level of satisfaction with t... Choose an option ^ 🗑️

Add a new mapping

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

...xt

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 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

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

Previous **Next**

## 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