

Salesforce Integration for Alchemer Survey

The Alchemer Salesforce Integration is available for our business platform customers. 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

⚠ Required Salesforce Permission for Tray.io Integration

Some customers are unable to authenticate with Salesforce via Tray.io because an additional Salesforce permission must be enabled in order for Tray to properly configure the connected app authentication.

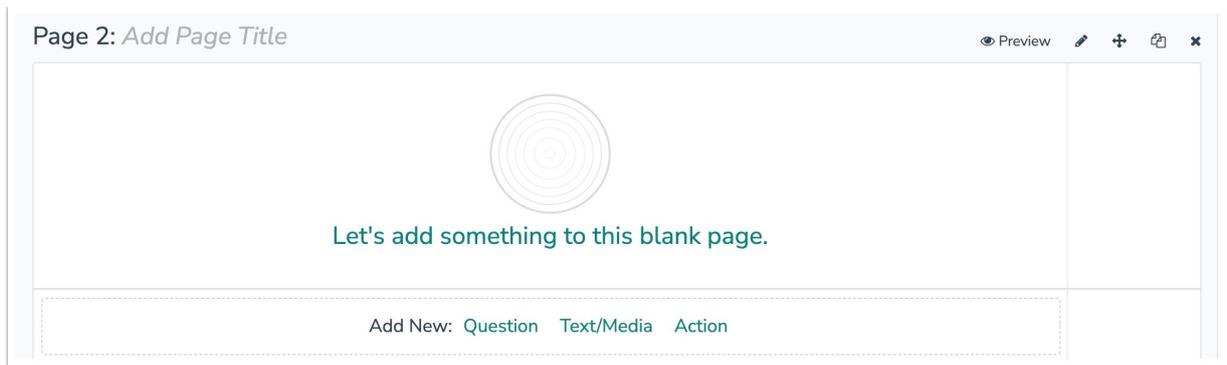
To prevent authentication errors, ensure that the Salesforce user performing the Tray.io setup has the *Approve Uninstalled Connected Apps* permission.

This permission is required in addition to other standard Salesforce integration permissions and should be granted in your Salesforce profile or permission set before you begin the Tray.io connection process.

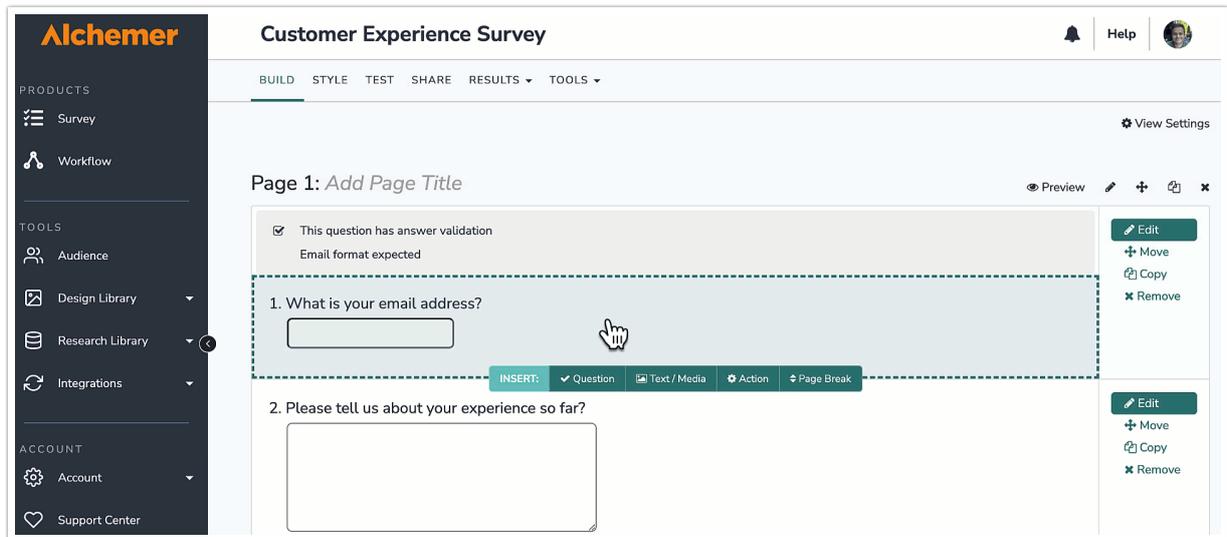
Adding an Integration Action

1. Select an existing survey or create a new survey. Then navigate to the Survey Builder.
2. Click "Add New: Action"

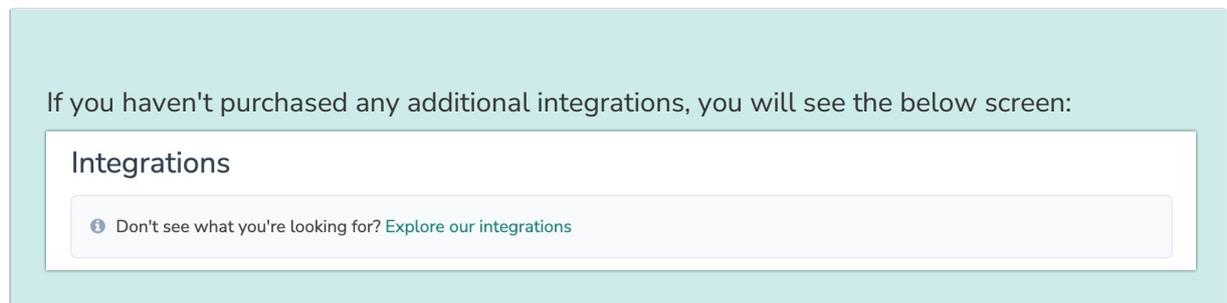
You cannot add this Integration Action to the first page of the survey.



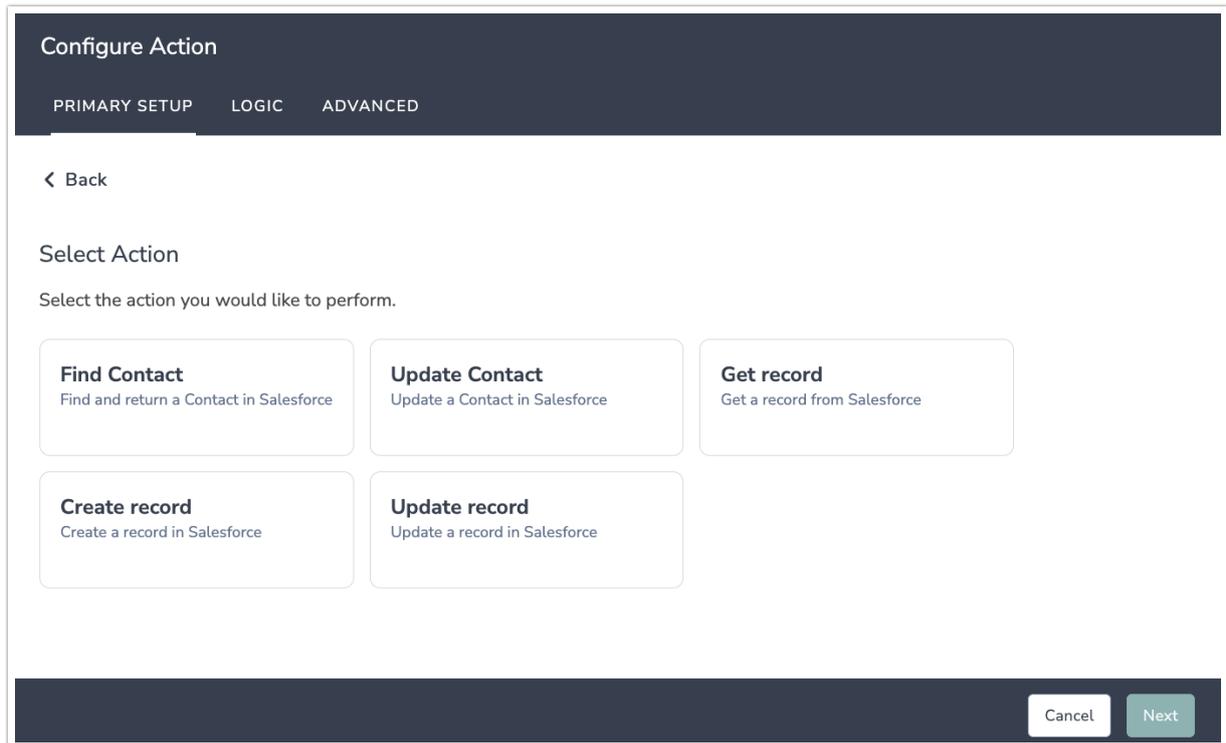
3. In the Add Action modal, scroll down to Integrations. Then click "Add" for one of your purchased integrations.



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

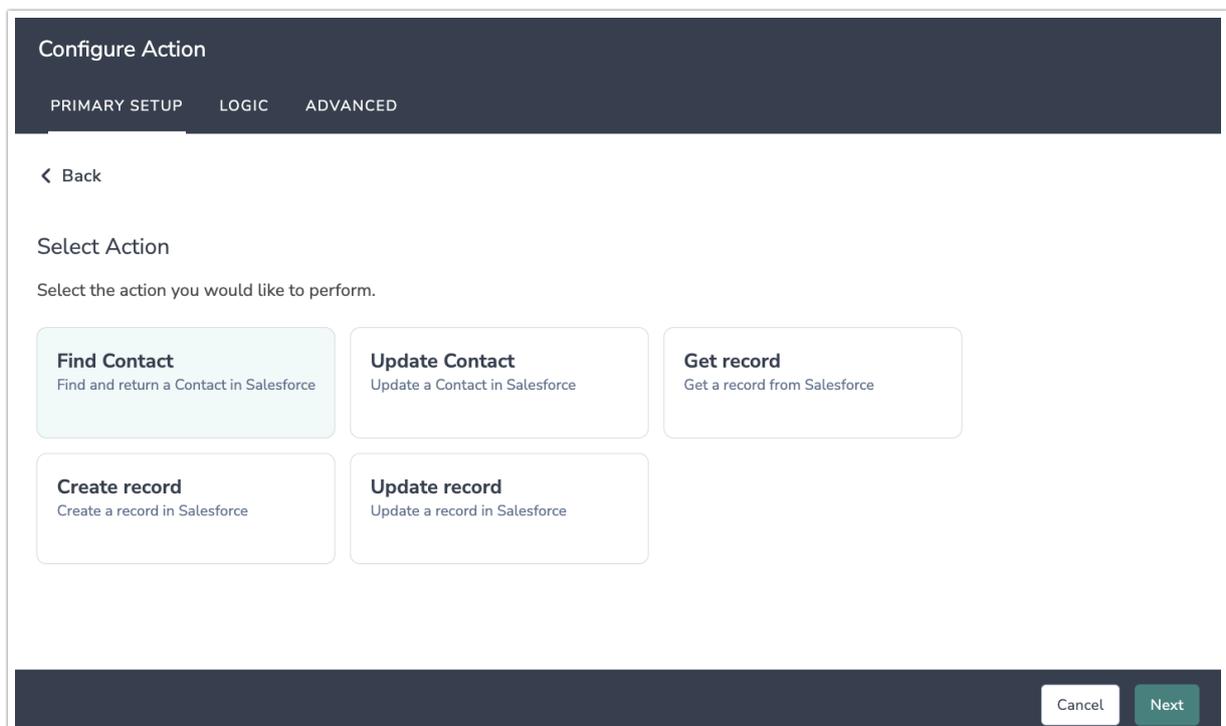


4. Select the action you would like to perform.



Configuration: Find Contact

1. Select "Find Contact"



2. Hit next on the integration overview screen.

Edit Action

PRIMARY SETUP

LOGIC

ADVANCED

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](#)



Previous

Next

3. Connect your Salesforce account.

⚠ Salesforce Permission Requirement for Tray.io Integrations

If you're using the Salesforce integration with Tray.io, make sure the Salesforce user account you're authenticating with has the "Approve Uninstalled Connected Apps" system permission enabled.

Without this permission, the integration will fail during authentication.

[🔗 Learn more about this Salesforce permission](#)

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) ▼



Add a new mapping



Previous

Next

6. Click "Save".

The screenshot shows the 'Edit Action' interface with a dark header bar containing the title 'Edit Action' and three tabs: 'PRIMARY SETUP', 'LOGIC', and 'ADVANCED'. The main content area is titled 'Salesforce | Setup complete' and contains the text: 'A log of each run result can be found in the Individual Responses > Action Log.' At the bottom right, there are 'Previous' and 'Save' buttons. A progress indicator at the bottom left shows four dots, with the third dot filled, indicating the current step.

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.

The screenshot shows the 'Edit Action' interface with the 'ADVANCED' tab selected. The title is 'Salesforce | Get data back' and the instruction is 'Select the Salesforce Contact fields you want to use in your survey.' There are two columns: 'Get this field from Salesforce' and 'To update this Alchemer survey field'. The first column has a dropdown menu with a red box highlighting the following options: 'Action | Metadata | errors', 'Action | Metadata | execution_start_time', 'Action | Metadata | formatted_response', 'Action | Metadata | message', 'Action | Metadata | raw_response', and 'Action | Metadata | status_code'. The second column has a dropdown menu with a trash icon. At the bottom right, there are 'Previous' and 'Next' buttons. A progress indicator at the bottom left shows four dots, with the second dot filled, indicating the current step.

Configuration: Update Contact

1. Select "Update Contact".

The screenshot shows the 'Configure Action' interface. At the top, there are three tabs: 'PRIMARY SETUP', 'LOGIC', and 'ADVANCED'. Below the tabs is a 'Back' button. The main section is titled 'Select Action' and contains the instruction 'Select the action you would like to perform.' There are five action cards: '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), and 'Update record' (Update a record in Salesforce). The 'Update Contact' card is highlighted with a light blue background. At the bottom right, there are 'Cancel' and 'Next' buttons.

2. Hit next on the integration overview screen.

The screenshot shows the 'Edit Action' interface for 'Salesforce | Update Contact'. At the top, there are three tabs: 'PRIMARY SETUP', 'LOGIC', and 'ADVANCED'. Below the tabs is the title 'Salesforce | Update Contact' and the description 'Update a Salesforce contact record.' Underneath, there is a section titled 'You will need:' followed by a bulleted list: 'Your Salesforce login', 'Fields in this survey that will contain the data used to find the Salsforce contact record', and 'Fields in this survey that will contain the data you want to use to update the contact'. At the bottom left, there is a link 'Need help? [Learn more](#)'. At the bottom right, there are 'Previous' and 'Next' buttons. A vertical scrollbar is visible on the right side of the content area.

3. Connect your Salesforce account.

⚠️ Salesforce Permission Requirement for Tray.io Integrations

If you're using the Salesforce integration with Tray.io, make sure the Salesforce user account you're authenticating with has the "Approve Uninstalled Connected Apps" system permission enabled.

Without this permission, the integration will fail during authentication.

[🔗 Learn more about this Salesforce permission](#)

The screenshot shows the 'Edit Action' configuration page for a Salesforce integration. The page has a dark header with the title 'Edit Action' and three tabs: 'PRIMARY SETUP', 'LOGIC', and 'ADVANCED'. The 'PRIMARY SETUP' tab is selected. Below the header, the page title is 'Salesforce | Authentication' and the instruction is 'Connect to your Salesforce account.' A dropdown menu shows 'Salesforce connected' with a Salesforce logo icon and a downward arrow. To the right of the dropdown is a three-dot menu icon. At the bottom of the page, there are four small dots for navigation, with the first one filled, and two buttons: 'Previous' and '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 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.

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: 7. Please indicate your level of satisfaction with t...

To update this Salesforce field: 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

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 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

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 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.

⚠ Salesforce Permission Requirement for Tray.io Integrations

If you're using the Salesforce integration with Tray.io, make sure the Salesforce user account you're authenticating with has the "Approve Uninstalled Connected Apps" system permission enabled.

Without this permission, the integration will fail during authentication.

[🔗 Learn more about this Salesforce permission](#)

Edit Action

PRIMARY SETUP LOGIC ADVANCED

Salesforce | Authentication

Connect to your Salesforce account.

Salesforce connected ▼ ...

Progress indicator: 1 of 5 steps (Step 1 is active)

Previous **Next**

3. Enter your Salesforce Domain.

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Salesforce | My Domain

Enter your Salesforce My Domain

Salesforce My Domain*

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

Progress indicator: 1 of 5 steps (Step 1 is active)

Previous **Next**

4. Select the Salesforce object type.

Configure Action

PRIMARY SETUP LOGIC ADVANCED

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 SETUP LOGIC ADVANCED

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 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: 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 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.

⚠ Salesforce Permission Requirement for Tray.io Integrations

If you're using the Salesforce integration with Tray.io, make sure the Salesforce user account you're authenticating with has the **"Approve Uninstalled Connected Apps"** system permission enabled.

Without this permission, the integration will fail during authentication.

[🔗 Learn more about this Salesforce permission](#)

Edit Action

PRIMARY SETUP LOGIC ADVANCED

Salesforce | Authentication

Connect to your Salesforce account.

Salesforce connected ▼ ...

Previous **Next**

3. Enter your Salesforce Domain.

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Salesforce | My Domain

Enter your Salesforce My Domain

Salesforce My Domain*

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

Previous **Next**

4. Select the Salesforce object type.

Configure Action

PRIMARY SETUP LOGIC ADVANCED

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

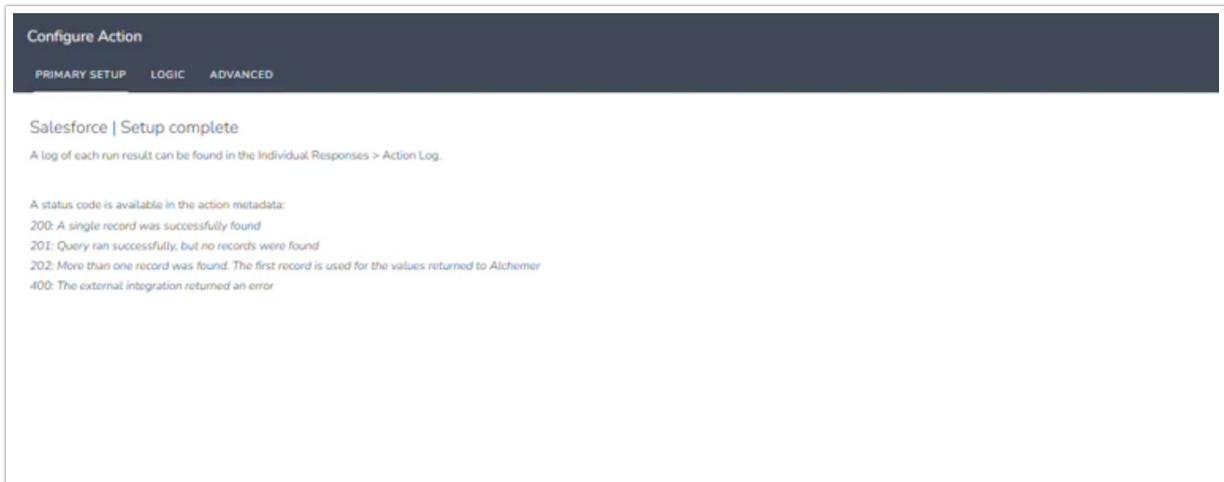
Select the fields you want to get back

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.

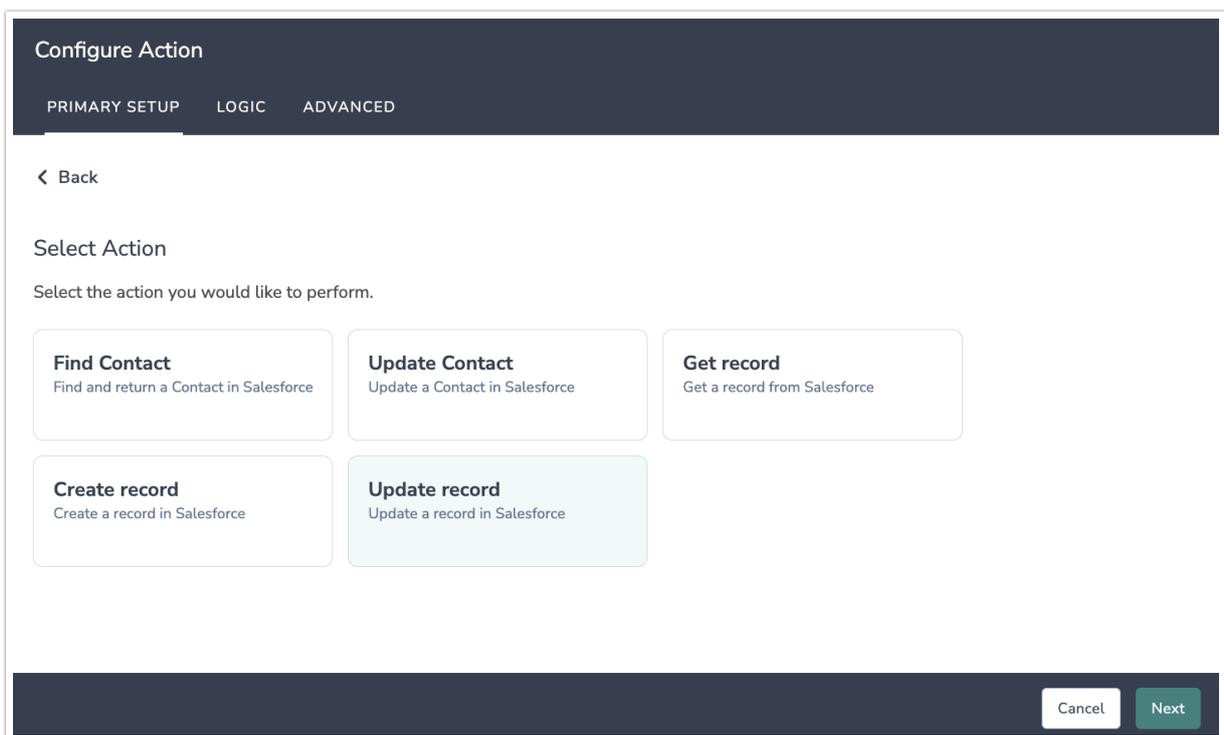


Configuration: Update record

You will need:

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

1. Select "Update record".



2. Connect your Salesforce account.

⚠ Salesforce Permission Requirement for Tray.io Integrations

If you're using the Salesforce integration with Tray.io, make sure the Salesforce user account you're authenticating with has the "Approve Uninstalled Connected Apps" system permission enabled.

Without this permission, the integration will fail during authentication.

[🔗 Learn more about this Salesforce permission](#)

Edit Action

PRIMARY SETUP LOGIC ADVANCED

Salesforce | Authentication

Connect to your Salesforce account.

 Salesforce connected ▼ ⋮

● ● ● ● ● ●

Previous Next

3. Enter your Salesforce Domain.

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Salesforce | My Domain

Enter your Salesforce My Domain

Salesforce My Domain*

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))

Progress indicator: 1 of 4 steps (1st step active)

Previous **Next**

4. Select the Salesforce object type.

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Salesforce | Select object

Select the Salesforce object type

Select object*

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 SETUP LOGIC ADVANCED

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 SETUP LOGIC ADVANCED

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.

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Salesforce | Get data back

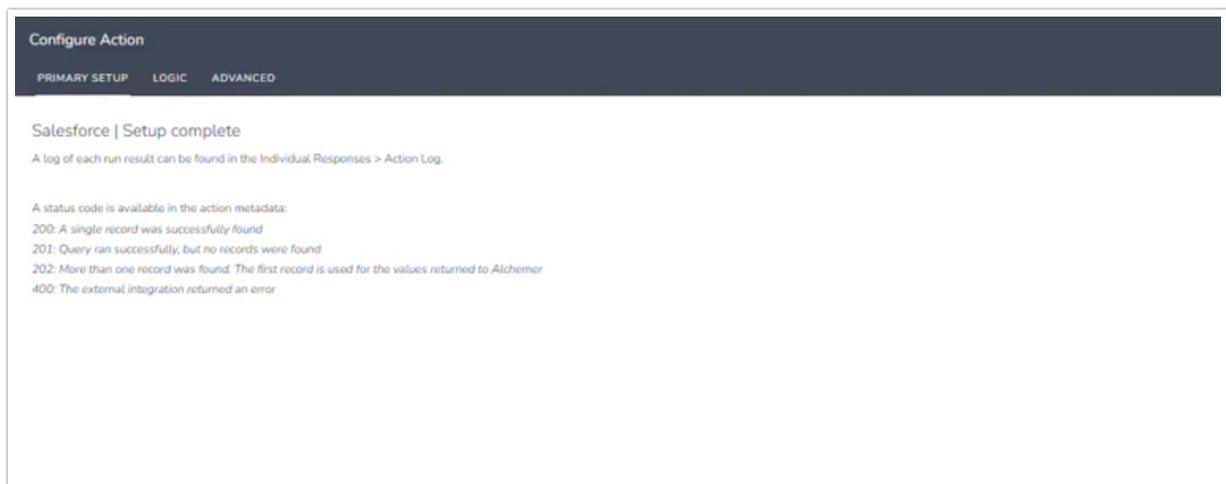
Select the fields you want to get back

Use this field To update this Alchemer survey field

Action | Metadata | message Question | 3. Message (id: 5)

Add a new mapping

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