

# Alchemer Survey Zoho CRM Integration

The Alchemer Survey Zoho Integration is available as an add-on. If you are interested in purchasing the Zoho Integration, please [contact us](#) for additional information.

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

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

Customer feedback collected through Alchemer seamlessly flows into Zoho, reducing data silos and conserving time and resources that would have otherwise been used on manually inputting feedback for contacts in Zoho.

On the Alchemer-side, this integration leverages data from Zoho contact records to create customized surveys tailored at the customer level. This personalized approach enables you to gather more relevant and targeted insights that lead to a better understanding of your customers' preferences and your overall customer experience.

**What are some examples of the Alchemer Zoho CRM Integration in practice:**

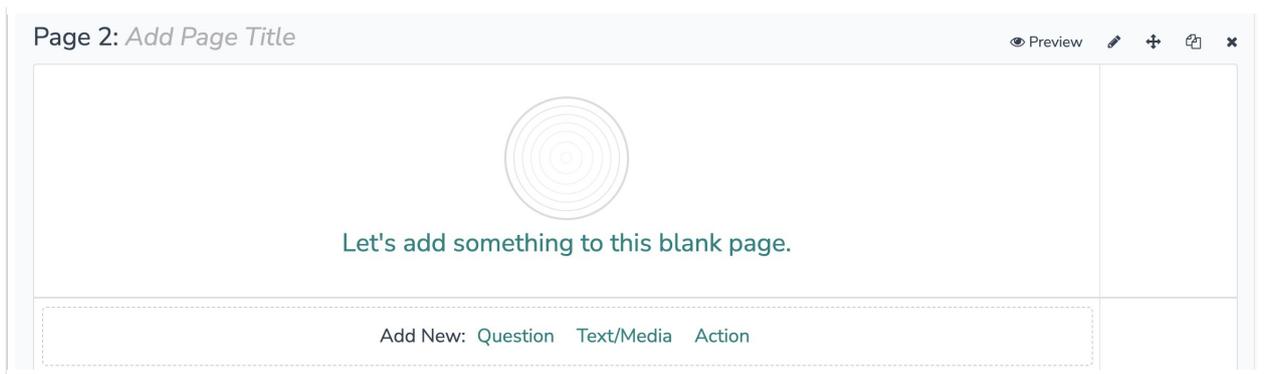
- Run a Customer Experience Survey in Alchemer and automatically update contact records in Zoho CRM when that customer provides feedback.
- Bring in data from Zoho contact records to personalize surveys sent through Alchemer.

## Integration Setup

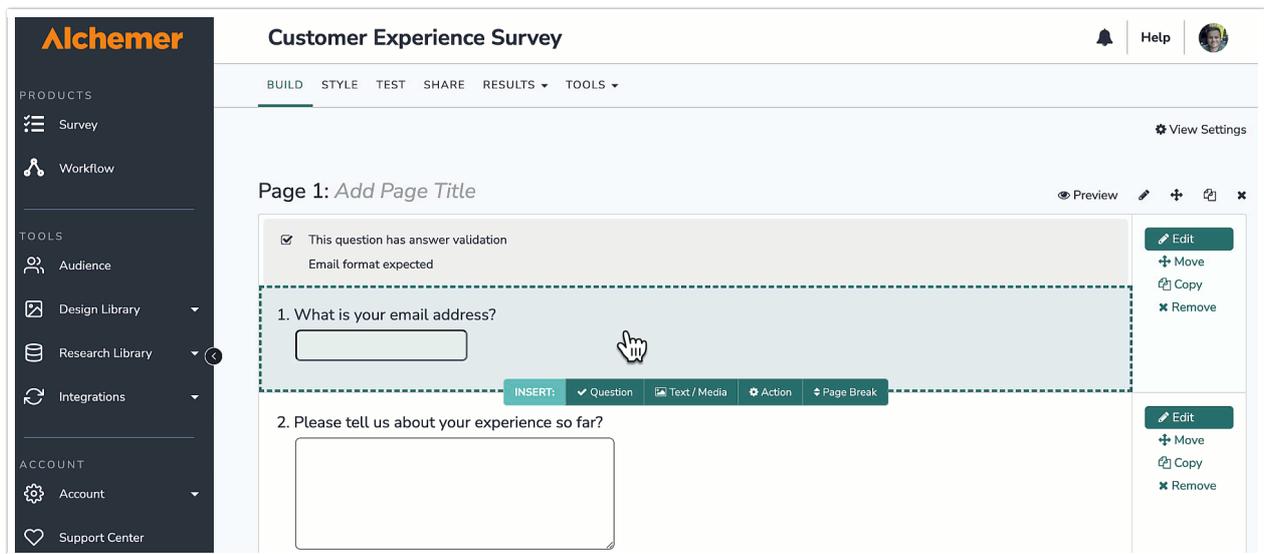
### Adding an Integration Action

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:

- Update Contact: Update contact fields within a contact in Zoho CRM. [Jump to section.](#)
- Get Contact: Get data from a Zoho CRM Contact. [Jump to section.](#)

### Configure Action

PRIMARY SETUP LOGIC ADVANCED

< Back

#### Select Action

Select the action you would like to perform.

**Update Contact**  
Update Zoho CRM Contact

**Get Contact**  
Get Zoho CRM Contact

Cancel Next

## Zoho CRM | Update Contact

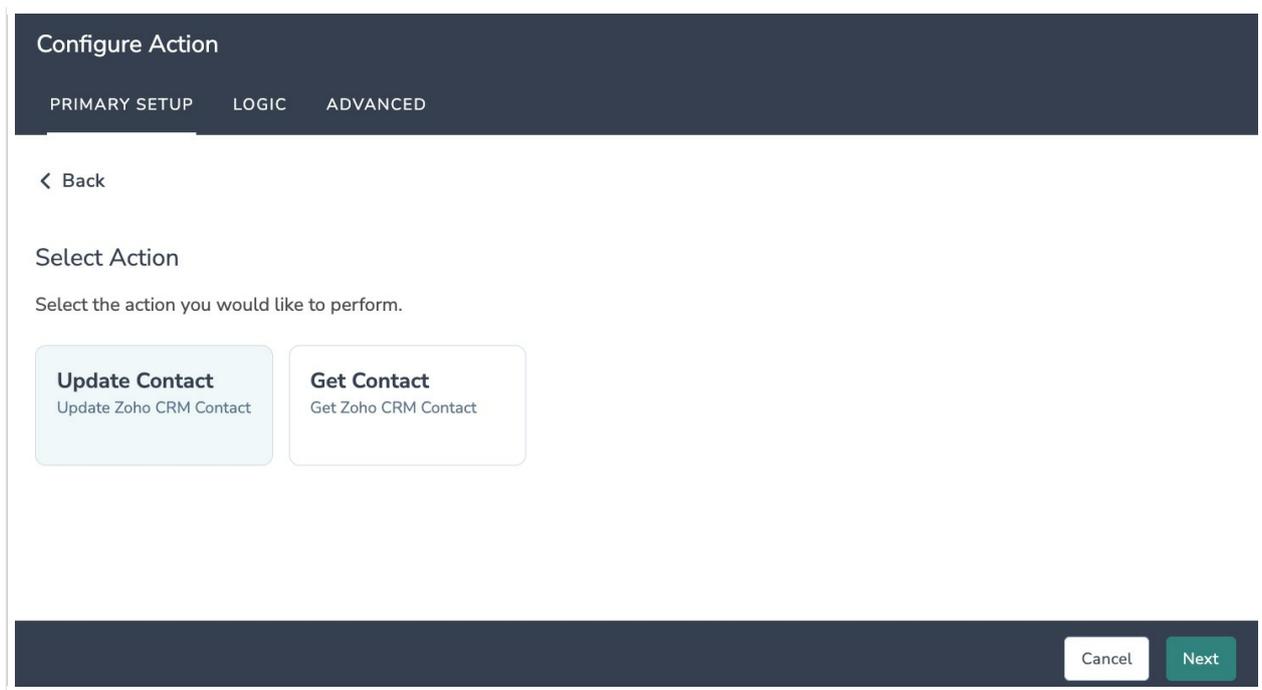
Your browser does not support HTML5 video.

To complete this integration action you will need:

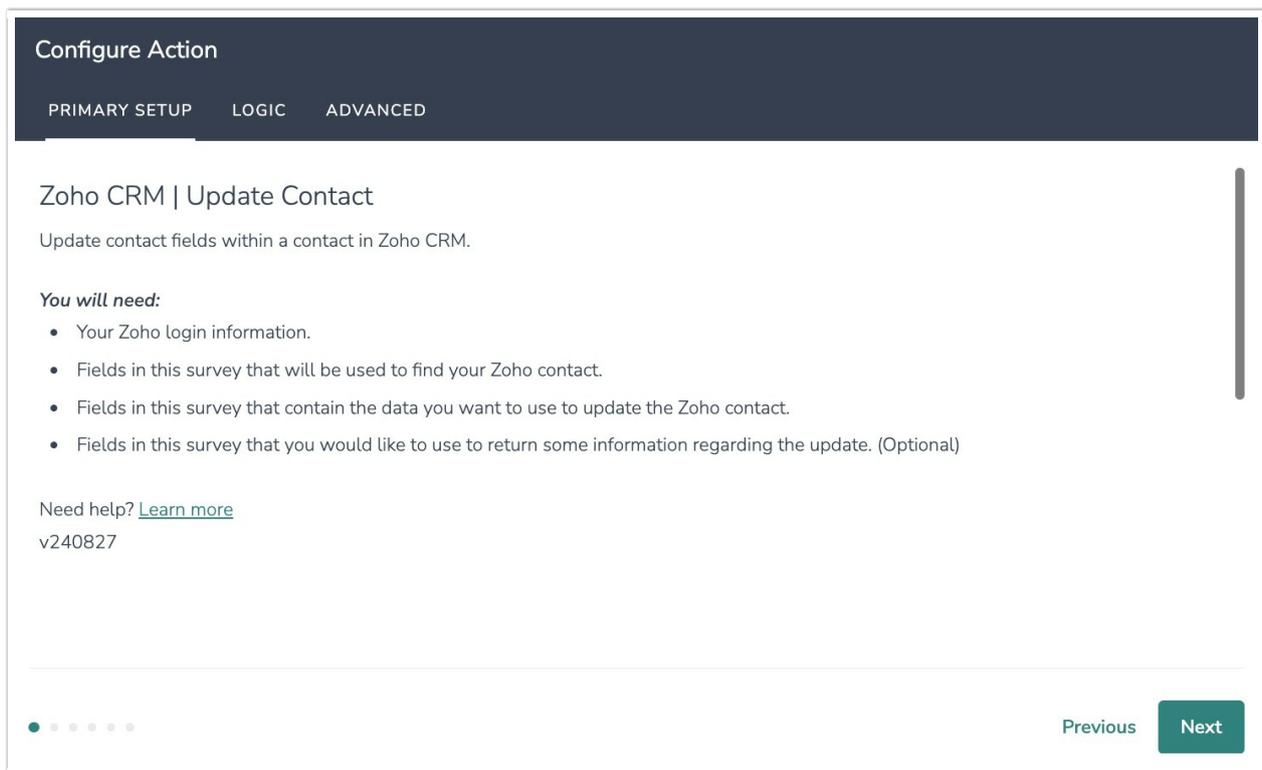
- Your Zoho login information
- Fields in this survey that will be used to find your Zoho contact.
- Fields in this survey that contain the data you want to use to update the Zoho contact.
- Fields in this survey that you would like to use to return some information regarding the update. (Optional)

1. Select the "Update Contact" action.

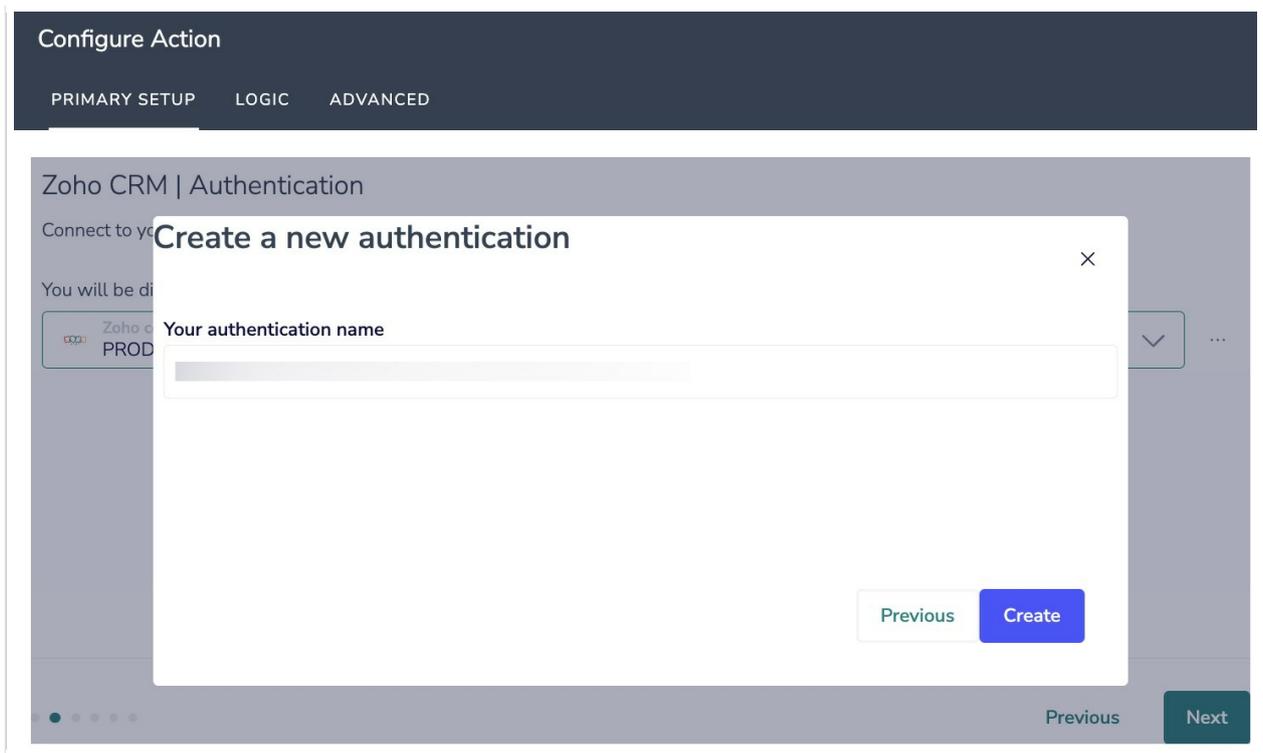
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2. Hit "next" on the overview screen.



3. Authenticate with your Zoho account. Name your new authentication then click "Create".



4. In the Zoho sign-in window that appears, provide your login credentials.

Zoho Accounts

accounts.zoho.com/signin?servicename=AaaServer&serviceurl=https%3A%2F...



[Try smart sign-in](#)

## Sign in

to access Accounts

Email address or mobile number

Next

Sign in using



5. Select the field in this survey that you want to use to find the specific contact record in Zoho. 'Contact | Email' will often make the most sense, but you can use any of the other fields listed in the drop-down list.

## Configure Action

PRIMARY SETUP LOGIC ADVANCED

### Zoho CRM | Find the Zoho Contact

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

Match This Alchemer Field Value

To a Value in This Zoho Contact Field

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

Zoho | Contact | Email

Add a new mapping

Only one field can be used to search



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 Zoho CRM and used as [Merge Codes](#) in your survey.

6. Map fields in Alchemer to corresponding fields in Zoho CRM.

For **Update Zoho CRM Contact Records**, you will map a survey field in Alchemer to a corresponding field in Zoho CRM. This will push the data from that survey field into Zoho and update the corresponding field for that contact record.

### Configure Action

PRIMARY SETUP LOGIC ADVANCED

#### Zoho CRM | Update Zoho Contact with Survey Data

Choose the survey data you want to use to update specific fields in your Zoho contact.

Use Data From This Alchemer Field To Update This Zoho Field

4. What city do you live in? (id: 82) Zoho | Contact | Mailing City

Add a new mapping

Previous Next

#### Optional: Get Data Back About the Contact Update Action

After a Zoho CRM 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.

For example, if there is an error in the action you can skip the rest of the survey questions for that respondent.

### Configure Action

PRIMARY SETUP LOGIC ADVANCED

#### Zoho CRM | Get Data Back

Choose the data you would like to return from the update and map it to a field in Alchemer. *Optional*

Use Data from the Customer Update To Update This Alchemer Field

Action | Metadata | message 4. Zoho return message (id: 6)

Add a new mapping

7. Click "Save" to complete the integration setup.

## Configure Action

PRIMARY SETUP LOGIC ADVANCED

### Zoho CRM | Setup Complete

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



Previous

Save

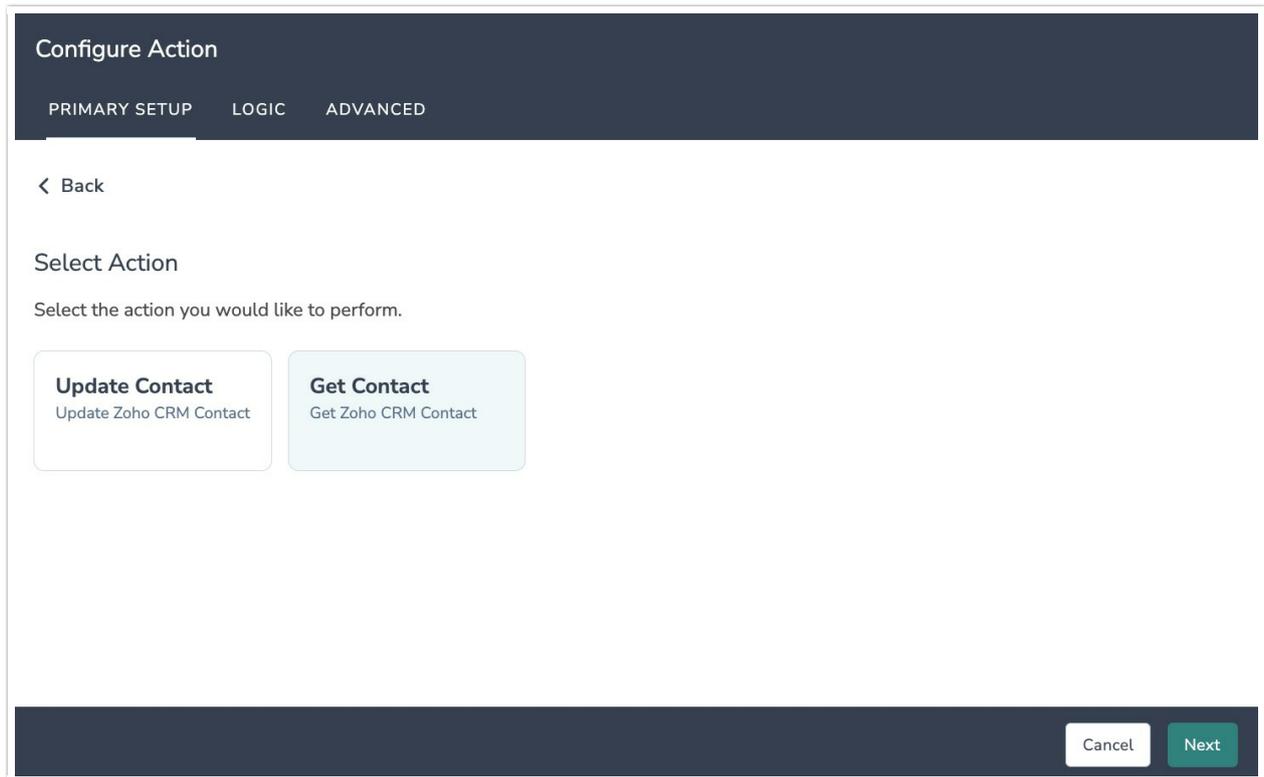
## Zoho CRM | Get Contact

Your browser does not support HTML5 video.

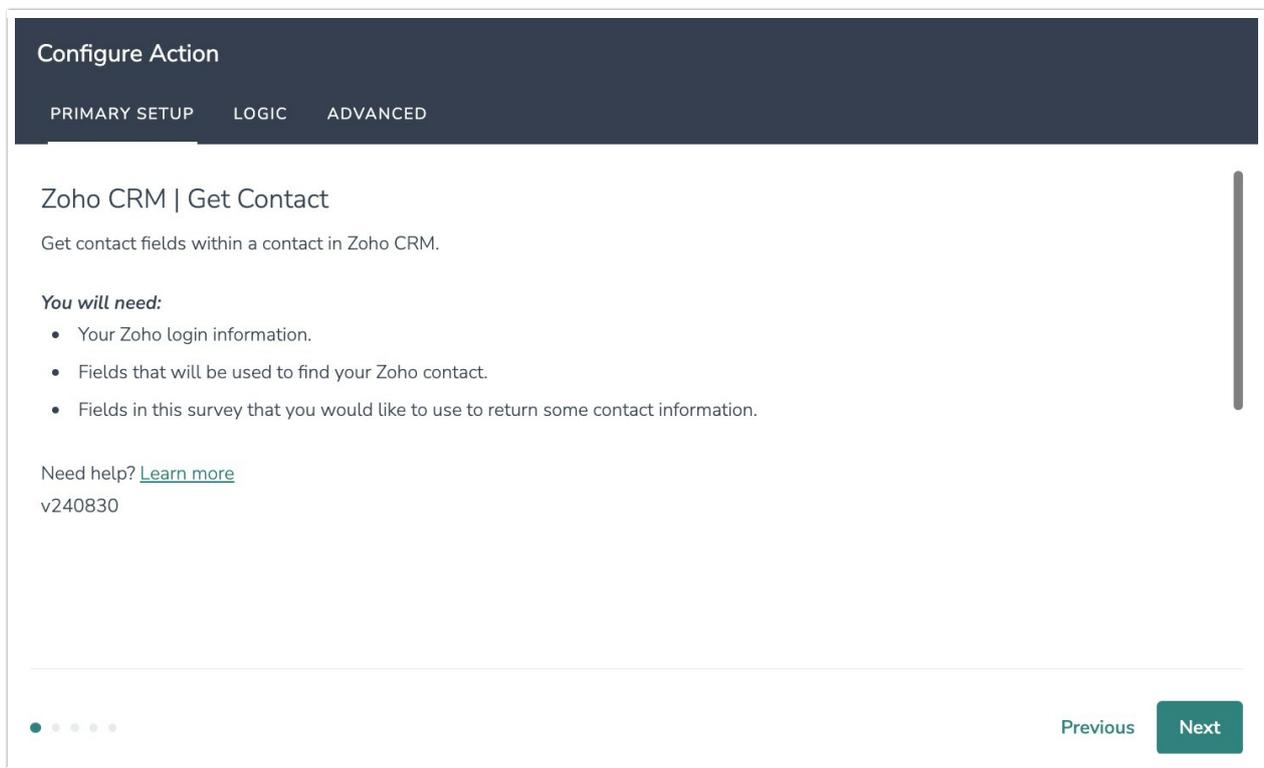
To complete this integration action you will need:

- Your Zoho login information.
- Fields that will be used to find your Zoho contact.
- Fields in this survey that you would like to use to return some contact information

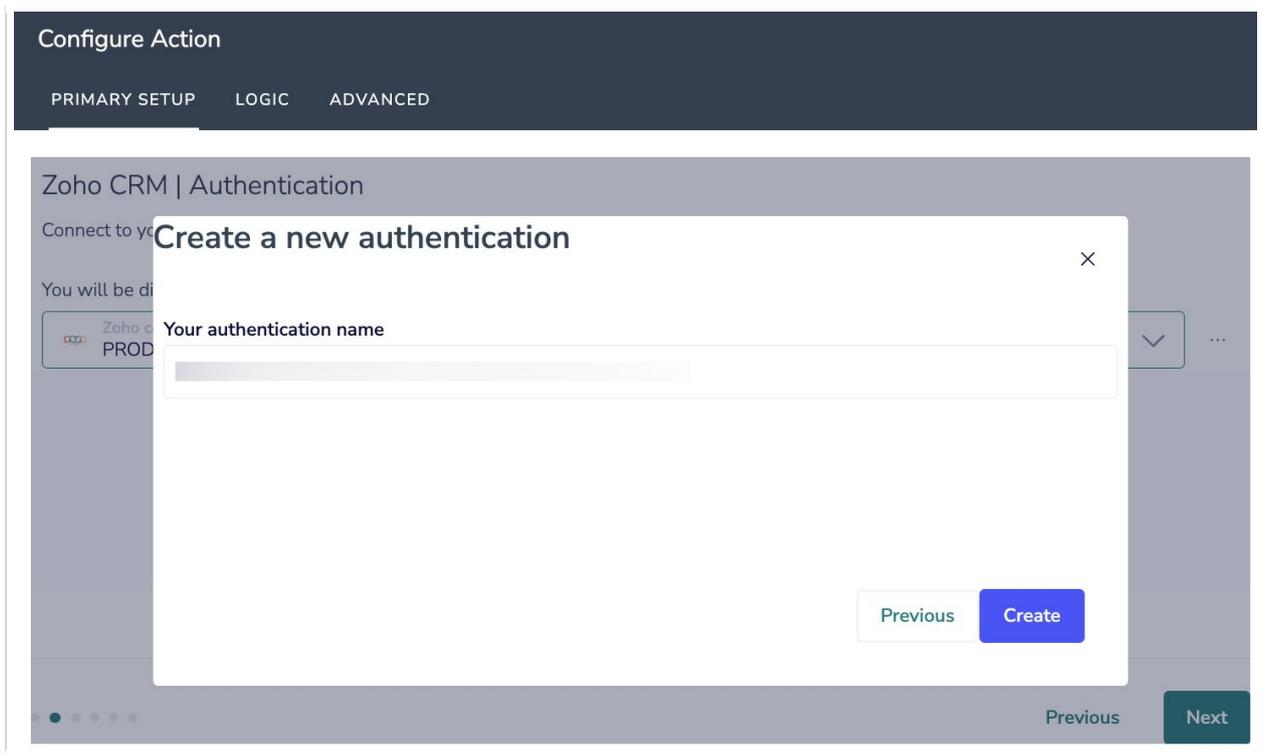
1. Select "Get Contact" as your integration action.



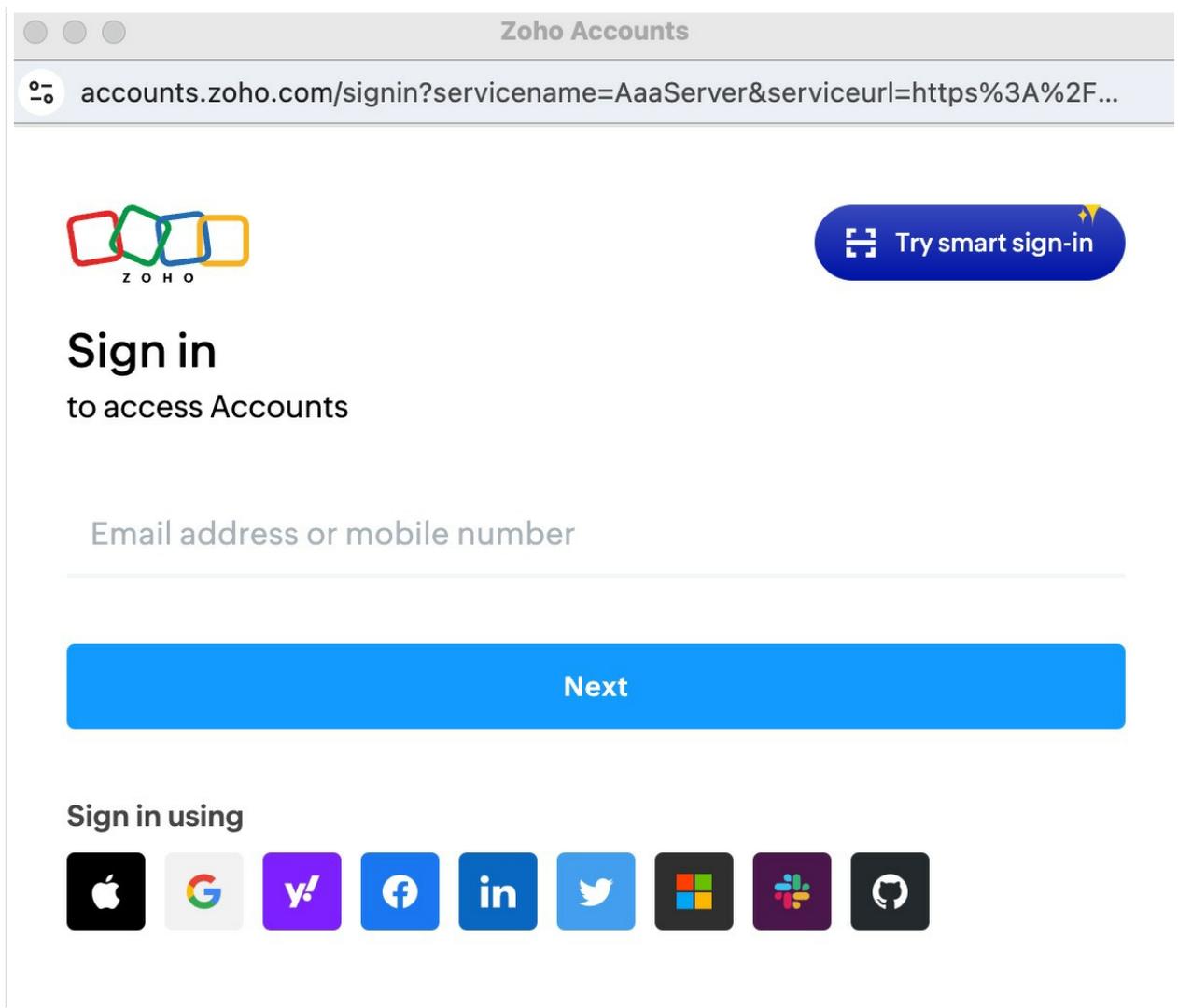
2. Hit "next" on the overview screen.



3. Authenticate with your Zoho account. Name your new authentication then click "Create".



4. In the Zoho sign-in window that appears, provide your login credentials.



5. Select the field in this survey that you want to use to find the specific contact record in your Zoho CRM. 'Contact Email' will often make the most sense, but you can use any of the other fields listed in the drop-down list.

### Configure Action

PRIMARY SETUP
LOGIC
ADVANCED

## Zoho CRM | Find the Zoho Contact

We need to find the specific contact to get data from when the survey runs.

Match This Alchemer Field Value
To a Value in This Zoho Contact Field

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

Zoho | Contact | Email
▼
🗑️

Add a new mapping

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Previous
Next

### How to Create Fields in Alchemer

1. Add survey questions that when answered will provide the desired field. (Example: What is your customer email address?)
2. Create a container using a [Hidden Value](#). These Hidden Values can then be mapped to fields in Zoho CRM and used as [Merge Codes](#) in your survey.

6. Map fields in your Zoho CRM to corresponding fields in Alchemer.

Map contact fields in Zoho CRM to corresponding fields in Alchemer. This will pull in data from an existing field in Zoho CRM and update the corresponding field in Alchemer.

### Configure Action

PRIMARY SETUP
LOGIC
ADVANCED

## Zoho CRM | Get Data Back

Choose the data you would like to return from the contact and map it to a field in Alchemer.

Use Data from the Customer Update
To Update This Alchemer Field

<span style="font-size: 0.8em;">Zoho   Contact   Lead_Source</span> <span style="float: right; font-size: 0.8em;">▼</span>	<span style="font-size: 0.8em;">2. Lead Source (id: 3)</span> <span style="float: right; font-size: 0.8em;">▼</span> <span style="float: right; font-size: 0.8em; color: #95a5a6;">🗑️</span>
<span style="font-size: 0.8em;">Zoho   Contact   First_Name</span> <span style="float: right; font-size: 0.8em;">▼</span>	<span style="font-size: 0.8em;">3. First Name (id: 4)</span> <span style="float: right; font-size: 0.8em;">▼</span> <span style="float: right; font-size: 0.8em; color: #95a5a6;">🗑️</span>
<span style="font-size: 0.8em;">Zoho   Contact   Title</span> <span style="float: right; font-size: 0.8em;">▼</span>	<span style="font-size: 0.8em;">4. Title (id: 5)</span> <span style="float: right; font-size: 0.8em;">▼</span> <span style="float: right; font-size: 0.8em; color: #95a5a6;">🗑️</span>
<span style="font-size: 0.8em;">Zoho   Contact   Department</span> <span style="float: right; font-size: 0.8em;">▼</span>	<span style="font-size: 0.8em;">5. Department (id: 6)</span> <span style="float: right; font-size: 0.8em;">▼</span> <span style="float: right; font-size: 0.8em; color: #95a5a6;">🗑️</span>

Add a new mapping

7. Click "Save: to complete the integration setup.

### Configure Action

PRIMARY SETUP LOGIC ADVANCED

#### Zoho CRM | Setup Complete

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

Previous Save

## Monitoring a Zoho CRM 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 whether the action was successful.

## FAQs

▶ What permissions do I need within Alchemer to set up and use the Zoho CRM integration?

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

Related Articles