

Excel Integration for Alchemer Survey

The Alchemer Excel Integration is available as an add-on and only available to customers in enterprise plans. If you are interested in purchasing the Excel Integration, please [contact us](#) for additional information.

With the Alchemer Excel integration you can easily:

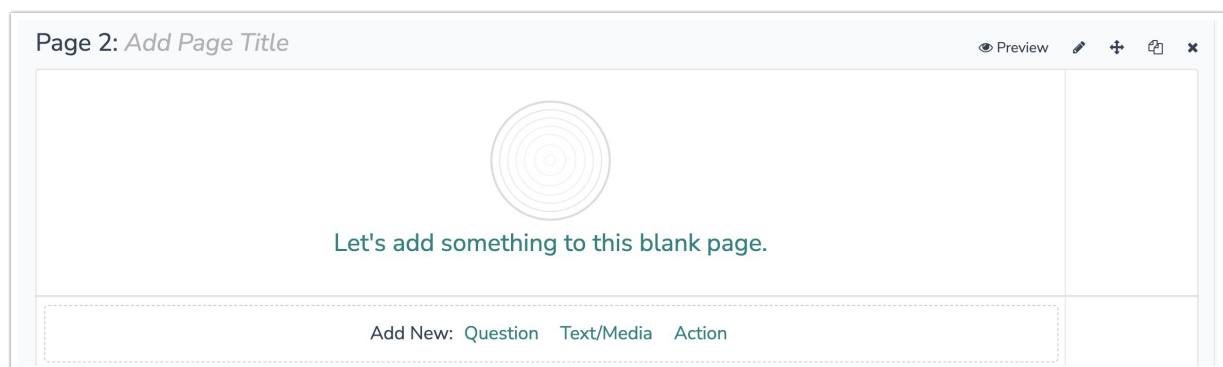
- Push survey data from Alchemer into an Excel Worksheet.
- Update an Excel Worksheet with data from Alchemer
- Get data from Excel for use in an Alchemer Survey

Integration Setup

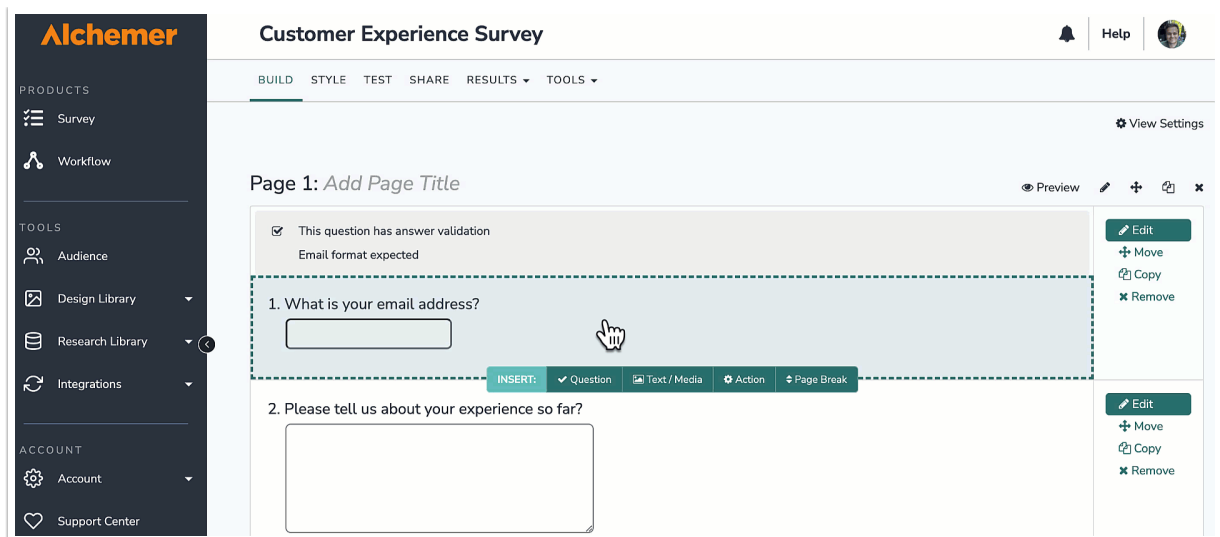
Adding an Integration Action

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

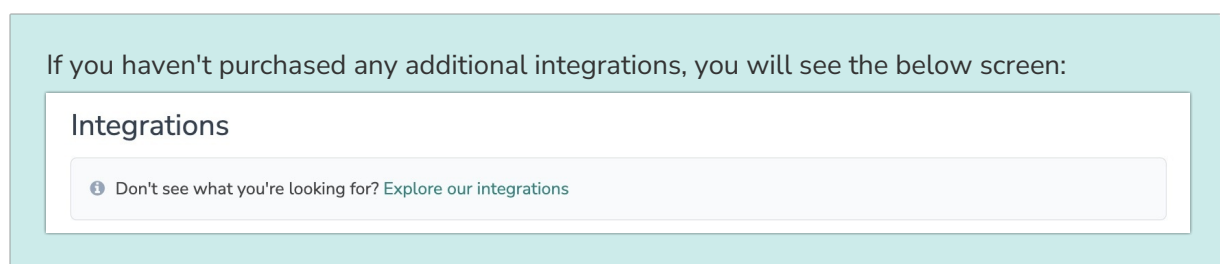
You cannot add this Integration Action to the first page of the survey.



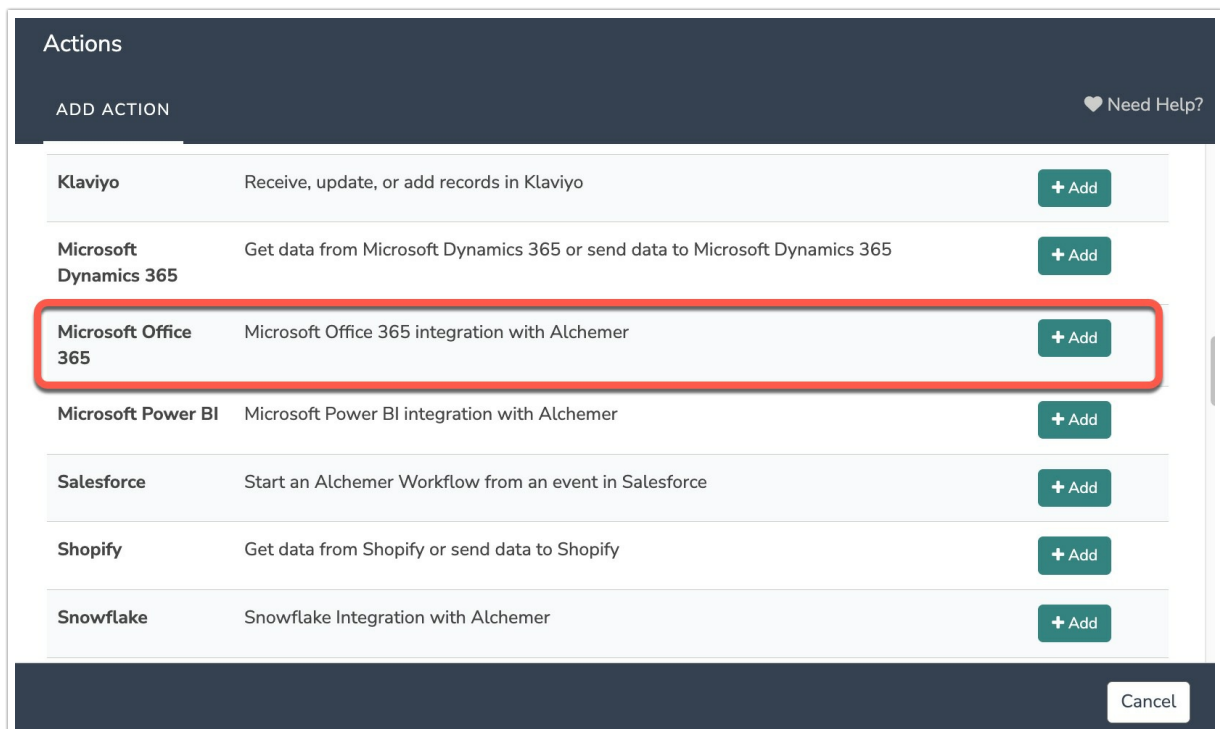
3. In the Add Action modal, scroll down to Integrations. Then click "Add" for one of your purchased integrations.



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



4. Select Microsoft Office 365 under "Your Integrations".



5. Select the action you would like to perform:

- Excel: Push data to a worksheet. [Jump to section.](#)
- Excel: Update data in a worksheet. [Jump to section.](#)
- Excel: Get data from a worksheet. [Jump to section.](#)

Configure Action

PRIMARY SETUPLOGICADVANCED

< Back

Select Action

Select the action you would like to perform.

Excel | Push data to Excel
Push data to an Excel Worksheet

Excel | Update data in Excel
Update an Excel worksheet

Excel | Get data from Excel
Get data from an Excel worksheet

Excel | Push Data to a Worksheet

Before configuring this integration action, you will need:

- Your Office 365 login information.
- Fields in this survey that contain the data you want to use to insert data into your worksheet.
- Fields in this survey that you would like to use to return some information regarding the update. (Optional)

1. You will need to first create an Excel worksheet within a workbook.

This worksheet must contain a header row with column titles.

2. Select "Excel | Push Data to Excel" as your action.

Configure Action

PRIMARY SETUPLOGICADVANCED

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Select Action

Select the action you would like to perform.

Excel | Push data to Excel
Push data to an Excel Worksheet

Excel | Update data in Excel
Update an Excel worksheet

Excel | Get data from Excel
Get data from an Excel worksheet

3. Click "Next" on the integration overview screen.

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | Push data to Excel

Push data to an Excel worksheet.

You will need:

- Your Office 365 login information.
- Fields in this survey that contain the data you want to use to insert data into your worksheet.
- Fields in this survey that you would like to use to return some information regarding the update. (Optional)

Need help? [Learn more](#)

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4. Authenticate with your Office 365 account. Click add a new account.

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Excel | Authentication

Connect to your Office365 account.

 PRODUCTION\JULIUS@PTL.COM Office365 account ^ ...

[Add a new account](#)

Previous **Next**


5. Name your new authentication and click "create".

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Excel | Authentication

Connect to your Office365 account.

 PRODUCTION\JULIUS@PTL.COM Office365 account ^ ...

You will be directed to the Microsoft 365 sign-in page.

Create a new authentication ×

Your authentication name

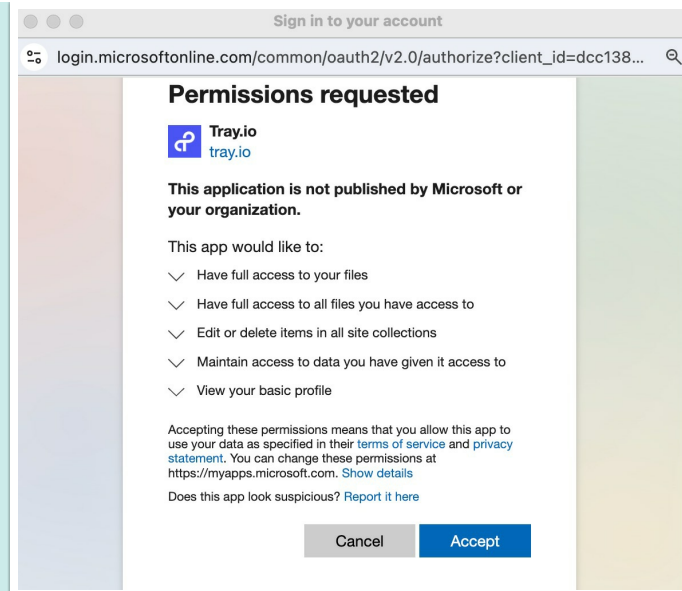
You need to type the authentication name to be able to continue.

Previous **Create**

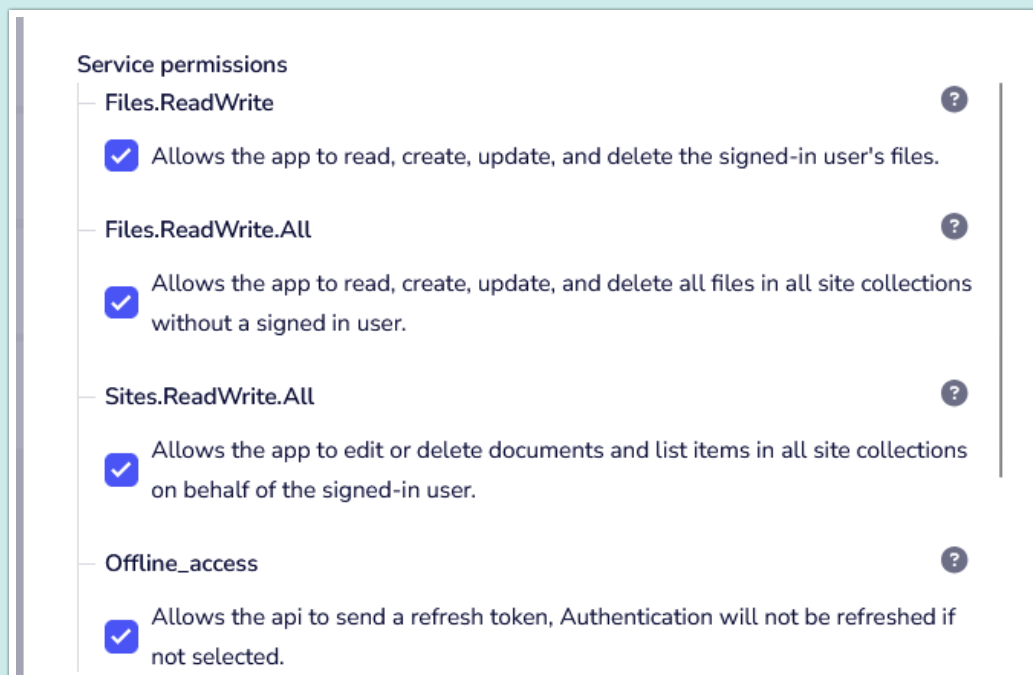
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6. In the sign-in window that appears input your Microsoft 365 credentials. Once complete, return to the setup wizard in Alchemer.

After signing in you will need to grant Alchemer (Tray.io) access to Microsoft 365.



You will need the following permissions:



7. Choose the Excel workbook that you would like to use to insert data into.

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | Choose Workbook

Choose the Excel workbook that you would like to use to insert data into.

Select Workbook*

1 NPS Excel sheet demo.xlsx

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8. Choose the Excel worksheet that you would like to use to insert data into.

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | Choose Worksheet

Choose the Excel worksheet that you would like to use to insert data into.

Select Worksheet*

Sheet1

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9. Choose the fields in your survey that you would like to use to insert a row into your Excel worksheet and map it to a column.

Configure Action
PRIMARY SETUP
LOGIC
ADVANCED

Excel | Update Row

Choose the fields in your survey that you would like to use to insert a row into your Excel worksheet and map it to a column.

Use Data From This Alchemer Field

To Update This Excel Column

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

A | Email

1. Based on our customer service, how likely are you to re...

B | NPS score

2. Why do you say that? (id: 69)

C | Notes

Add a new mapping

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10. (Optional) After an integration action occurs, data about the action is available for use in your survey. You can map this data back to fields in Alchemer.

Configure Action
PRIMARY SETUP
LOGIC
ADVANCED

Excel | Return Data

Choose data that you would like to return from the insert.

Use Data from the insert

To Update This Alchemer Field

Action | Metadata | status_code

13. Metadata: Status (id: 92)

Add a new mapping

This is optional

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11. Click "Save" to complete your integration action.

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | 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: Successfully updated Excel row.
202: Failed to get Excel row.
400: The external integration returned an error.

Excel | Update Data in Excel

1. Select "Update data in Excel"

You will need:

- Your Office 365 login information
- Fields in this survey that contain information used to find the Excel row
- Fields in this survey that will contain information to update the Excel row

Configure Action

PRIMARY SETUPLOGICADVANCED

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Select Action

Select the action you would like to perform.

Excel | Push data to Excel
Push data to an Excel Worksheet

Excel | Update data in Excel
Update an Excel worksheet

Excel | Get data from Excel
Get data from an Excel worksheet

2. Click "Next" on the integration overview screen.

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | Update data in Excel

Update a row in an Excel worksheet

You will need:

- Your Office 365 login information
- Fields in this survey that contain information used to find the Excel row
- Fields in this survey that will contain information to update the Excel row

Need help? [Learn more](#)

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3. Authenticate with your Office 365 account. Click add a new account.

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | Authentication

Connect to your Office365 account.

 PRODUCTION\JULY15\7151077081's Office 365 account

^

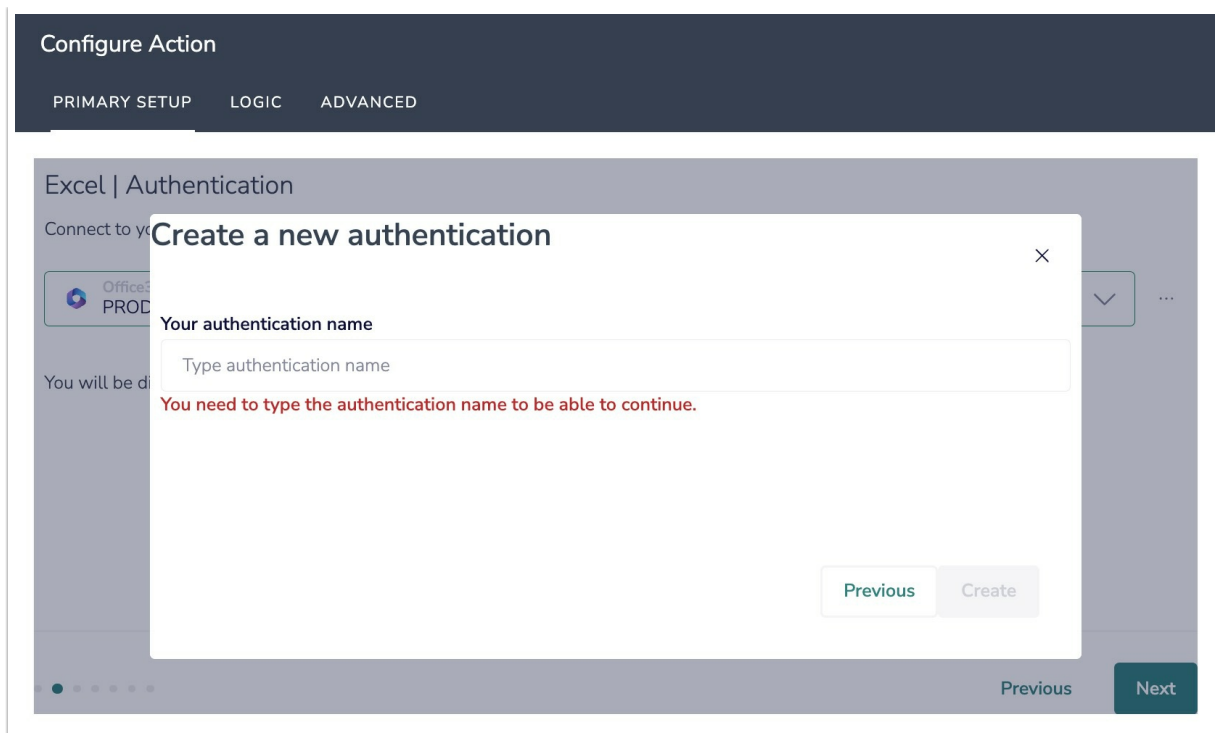
...

[Add a new account](#)

Previous

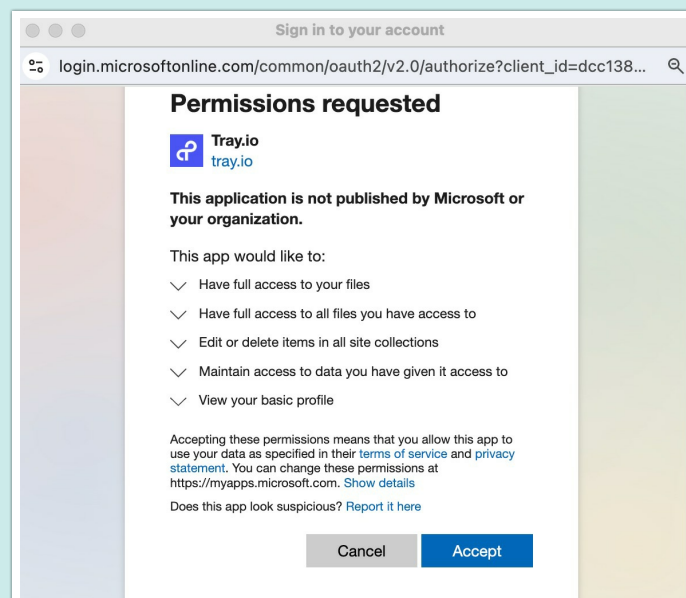
Next

4. Name your new authentication and click "create".

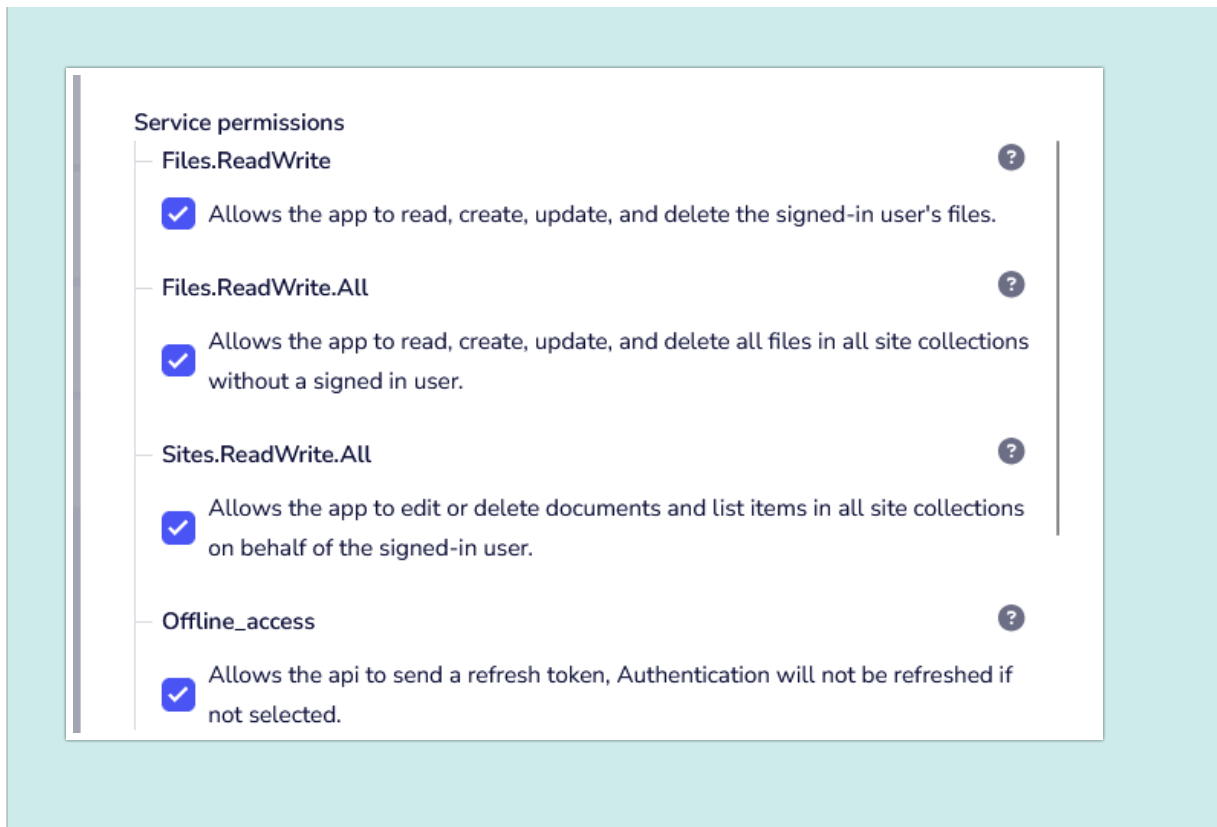


5. In the sign-in window that appears input your Microsoft 365 credentials. Once complete, return to the setup wizard in Alchemer.

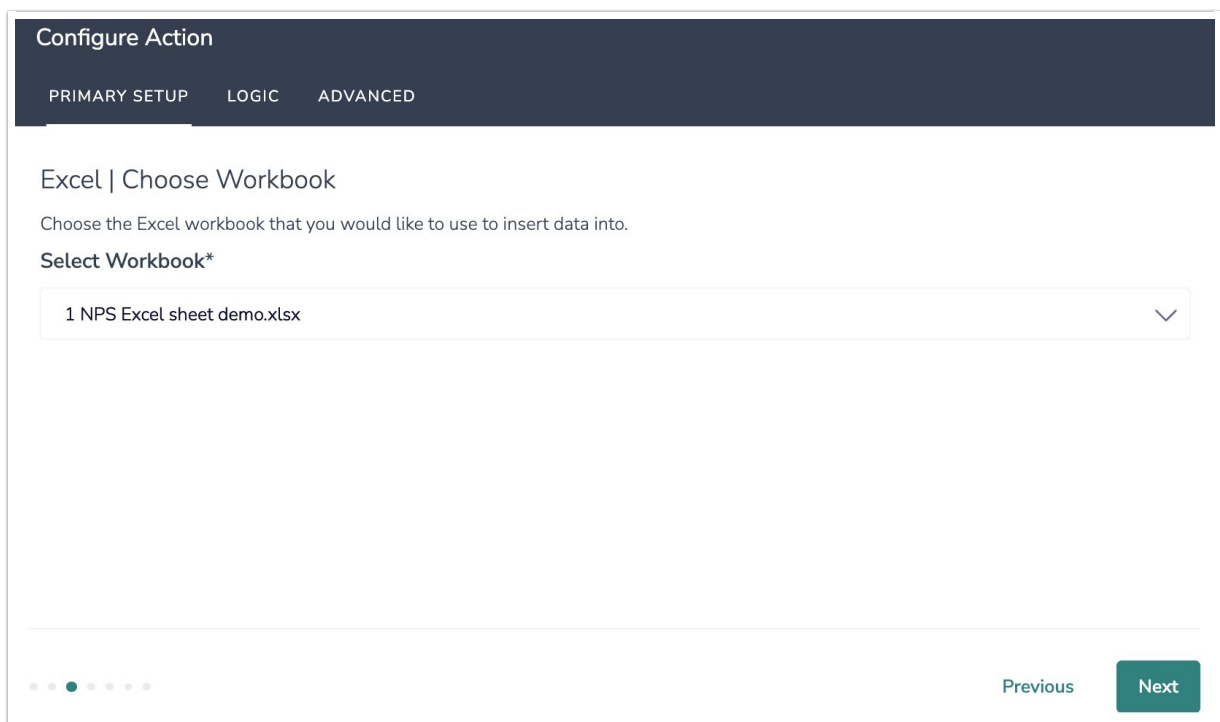
After signing in you will need to grant Alchemer (Tray.io) access to Microsoft 365.



You will need the following permissions:



6. Choose the Excel workbook that you want to insert data into.



7. Choose the Excel worksheet that you would like to use to insert data into.

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | Choose worksheet

Choose the Excel worksheet that you would like to use to insert data into.

Select Worksheet*

Project Tracker

8. Choose the fields in your survey that you would like to use to find the specific Excel row to use for the update. Then choose the data type of the column you select for the input

This will update the first match found.

Choose a unique field to query on as this only supports a single field

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | Find row

Choose the fields in your survey that you would like to use to find the specific Excel row.

Please choose one:

Use this Alchemer field value

to match this Excel field

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

B |

Add a new mapping

Input data type*

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9. Choose the fields in this survey that you would like to use to update a row in your Excel worksheet.

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | Update row

Choose the fields in this survey that you would like to use to update a row in your Excel worksheet.

Use this Alchemer field value

To update this Excel field

Question | 2. Why do you say that? (id: 69)

B |

Add a new mapping

10. (Optional) After an integration action occurs, data about the action is available for use in your survey. You can map this data back to fields in Alchemer.

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | Return Data

Choose data that you would like to return from the insert.

Use Data from the insert

To Update This Alchemer Field

Action | Metadata | status_code

13. Metadata: Status (id: 92)

Add a new mapping

This is optional

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11. Click "Save" to complete your integration action.

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | 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: Successfully updated Excel row.
202: Failed to get Excel row.
400: The external integration returned an error.

Excel | Get Data from Excel

You will need:

- Your Office 365 login information
- Fields in this survey that contain information to use to find the Excel row
- Fields in this survey where you want to save the Excel data

1. Select "Get Data from Excel"

Configure Action

PRIMARY SETUPLOGICADVANCED

< Back

Select Action

Select the action you would like to perform.

Excel | Push data to Excel
Push data to an Excel Worksheet

Excel | Update data in Excel
Update an Excel worksheet

Excel | Get data from Excel
Get data from an Excel worksheet

Cancel

Next

2. Click "Next" on the integration overview screen.

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | Get data from Excel

Get data from a row in Excel

You will need:

- Your Office 365 login information
- Fields in this survey that contain information to use to find the Excel row
- Fields in this survey where you want to save the Excel data

Need help? [Learn more](#)

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3. Authenticate with your Office 365 account. Click add a new account.

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | Authentication

Connect to your Office365 account.

PRODUCTION\JCT50871.T10877081's Office 365 account

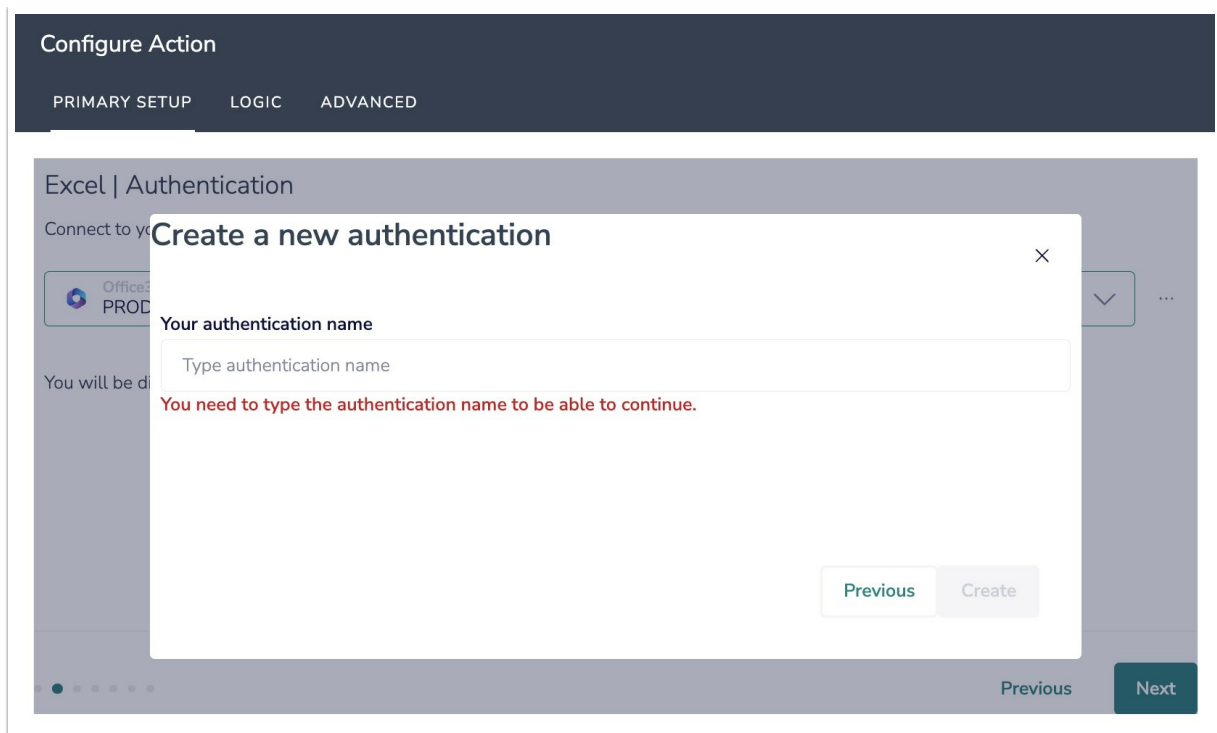
^

...

[Add a new account](#)

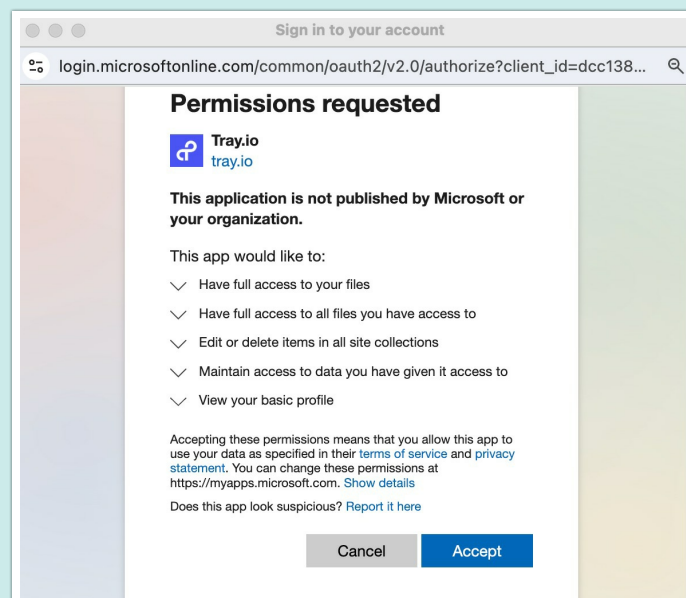
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4. Name your new authentication and click "create".

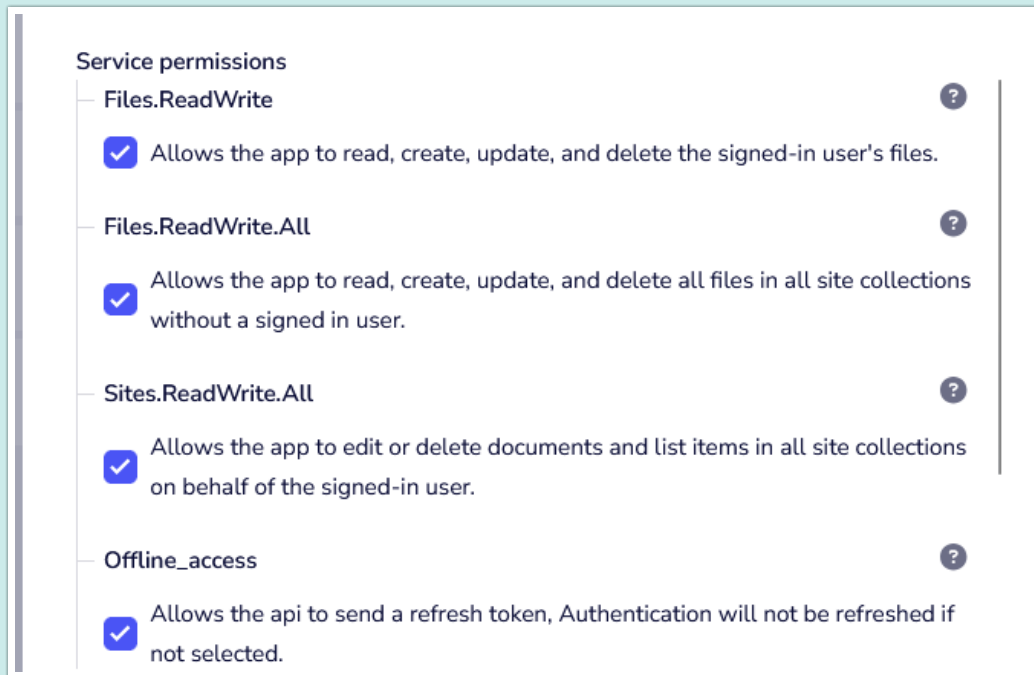


5. In the sign-in window that appears input your Microsoft 365 credentials. Once complete, return to the setup wizard in Alchemer.

After signing in you will need to grant Alchemer (Tray.io) access to Microsoft 365.



You will need the following permissions:

A screenshot of a 'Service permissions' configuration window. The window has a title bar and a list of four permissions, each with a checkbox and a description. The permissions are: 'Files.ReadWrite' (checked), 'Files.ReadWrite.All' (checked), 'Sites.ReadWrite.All' (checked), and 'Offline_access' (checked). Each permission has a question mark icon to its right. The descriptions are: 'Allows the app to read, create, update, and delete the signed-in user's files.', 'Allows the app to read, create, update, and delete all files in all site collections without a signed in user.', 'Allows the app to edit or delete documents and list items in all site collections on behalf of the signed-in user.', and 'Allows the api to send a refresh token, Authentication will not be refreshed if not selected.'

Service permissions

- ☒ **Files.ReadWrite** ?
Allows the app to read, create, update, and delete the signed-in user's files.
- ☒ **Files.ReadWrite.All** ?
Allows the app to read, create, update, and delete all files in all site collections without a signed in user.
- ☒ **Sites.ReadWrite.All** ?
Allows the app to edit or delete documents and list items in all site collections on behalf of the signed-in user.
- ☒ **Offline_access** ?
Allows the api to send a refresh token, Authentication will not be refreshed if not selected.

6. Choose the Excel workbook that you would like to pull data from.

7. Select the worksheet that you would like to pull data from.

8. Choose the fields in your survey that you would like to use to find the specific Excel row to use for the update. Then choose the data type of the column you select for the input

This will update the first match found.

Choose a unique field to query on as this only supports a single field

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | Find row

Choose the fields in your survey that you would like to use to find the specific Excel row.

Please choose one:

Use this Alchemer field value

to match this Excel field

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

B |

Add a new mapping

Input data type*

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Next

9. Select the fields you want to get back from Excel.

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

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | Get data back

Select the fields you want to get back.

Use this Excel field

To update this Alchemer survey field

Action | Metadata | status_code

Question | 13. Metadata: Status (id: 92)

Add a new mapping

PreviousNext

10. Click "Save".

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | 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: Successfully pulled Excel row.

202: Failed to get Excel row.

400: The external integration returned an error.

PreviousSave

Monitoring an Excel 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 Excel integration?
- This integration doesn't fit my use cases, or I want to provide feedback to Alchemer!

Related Articles