

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:

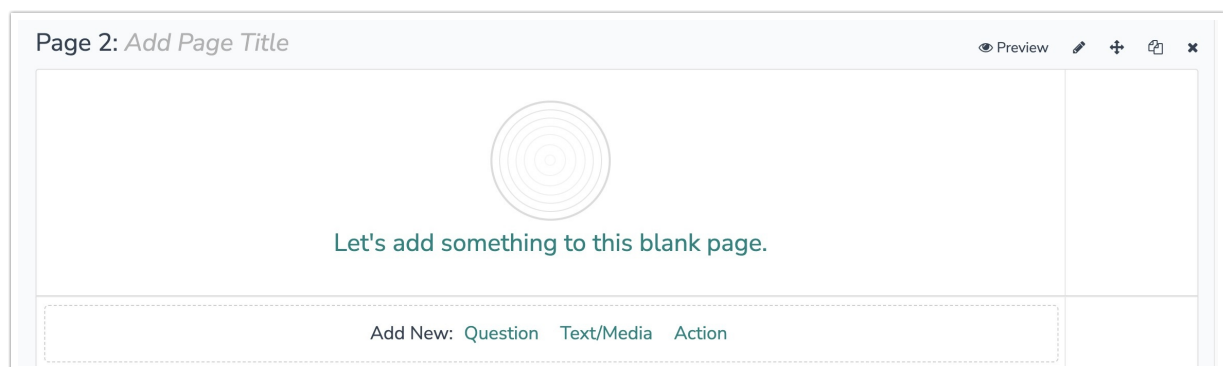
- Push survey data from Alchemer into an Excel Worksheet.
- Update an Excel Worksheet with data from Alchemer
- Get data from Excel for use in an Alchemer Survey

Integration Setup

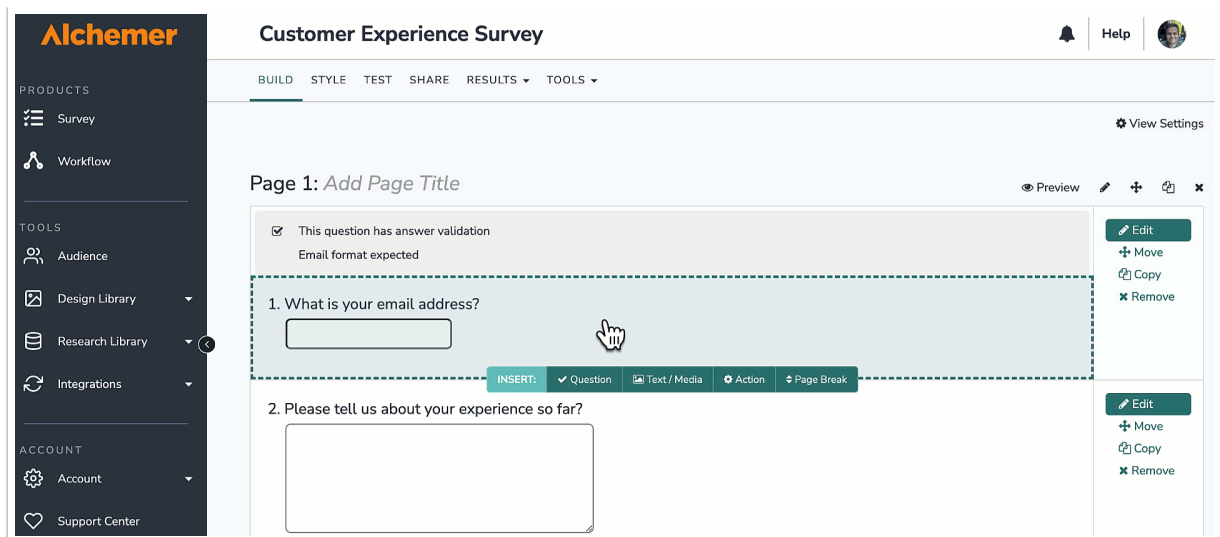
Adding an Integration Action

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.



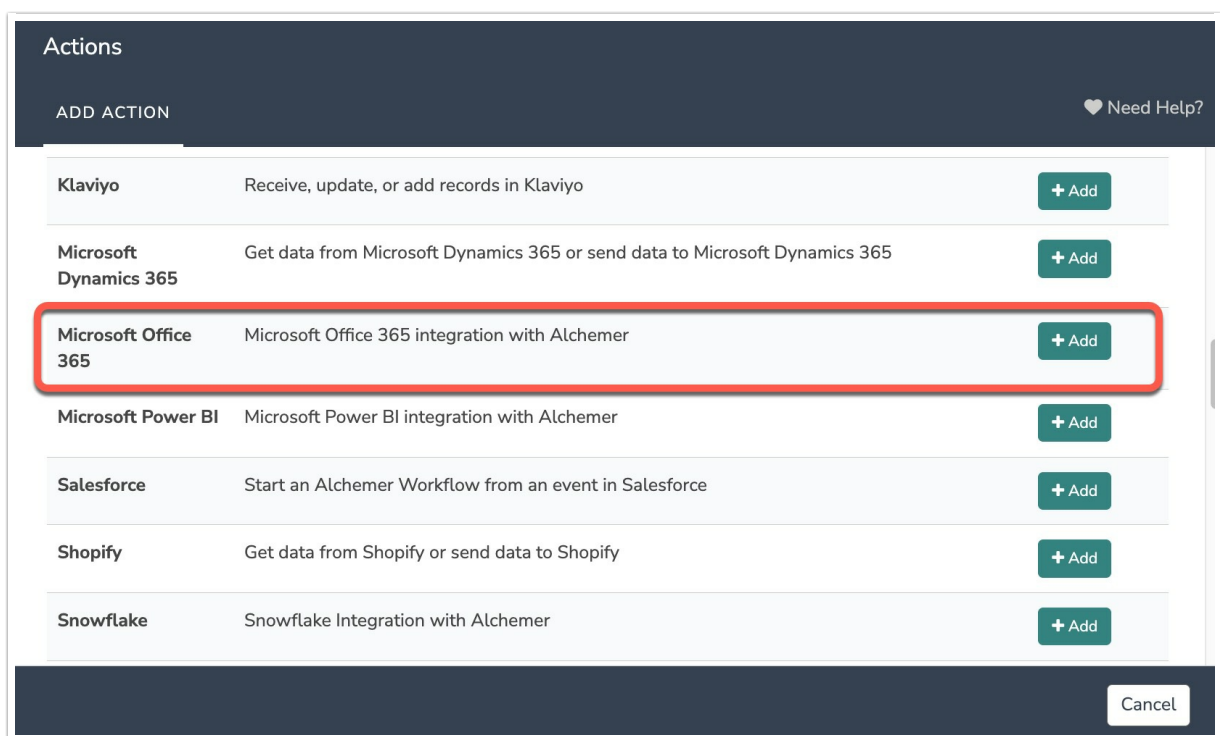
3. In the Add Action modal, scroll down to Integrations. Then click "Add" for one of your purchased integrations.



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

Configure Action

PRIMARY SETUPLOGICADVANCED

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Select Action

Select the action you would like to perform.

Excel | Update data in Excel

Update an Excel worksheet in OneDrive or SharePoint

Excel | Get data from Excel

Get data from an Excel worksheet in OneDrive or SharePoint

Excel | Push data to Excel

Push data to an Excel table in SharePoint or OneDrive

Excel | Push structured response

Sends a structured response to an Excel workbook

Cancel

Next

Excel | Push Data to Excel

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 SETUP LOGIC ADVANCED

Excel | Authentication

Connect to your Office365 account.

 PRODUCTION\SUBJECTS\713087708\ 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\SUBJECTS\713087708\ Office365 account ^ ...

[Add a new account](#)

Previous **Next**

Create a new authentication

Your authentication name

Type authentication name

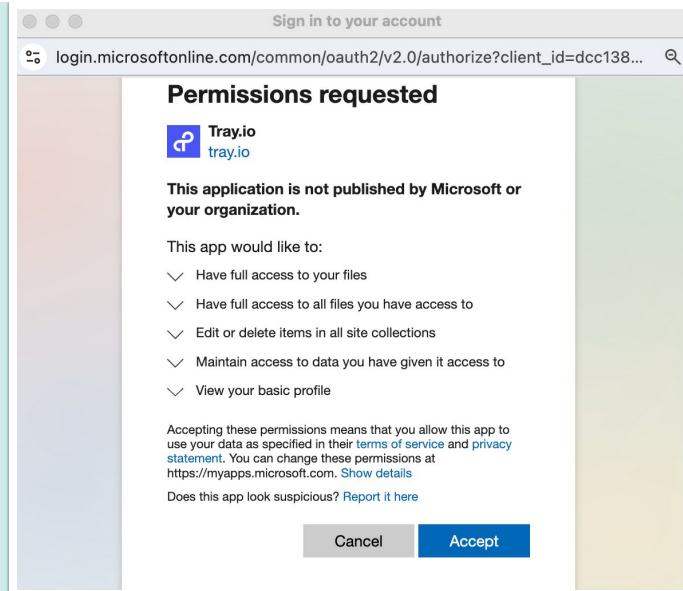
You need to type the authentication name to be able to continue.

Previous

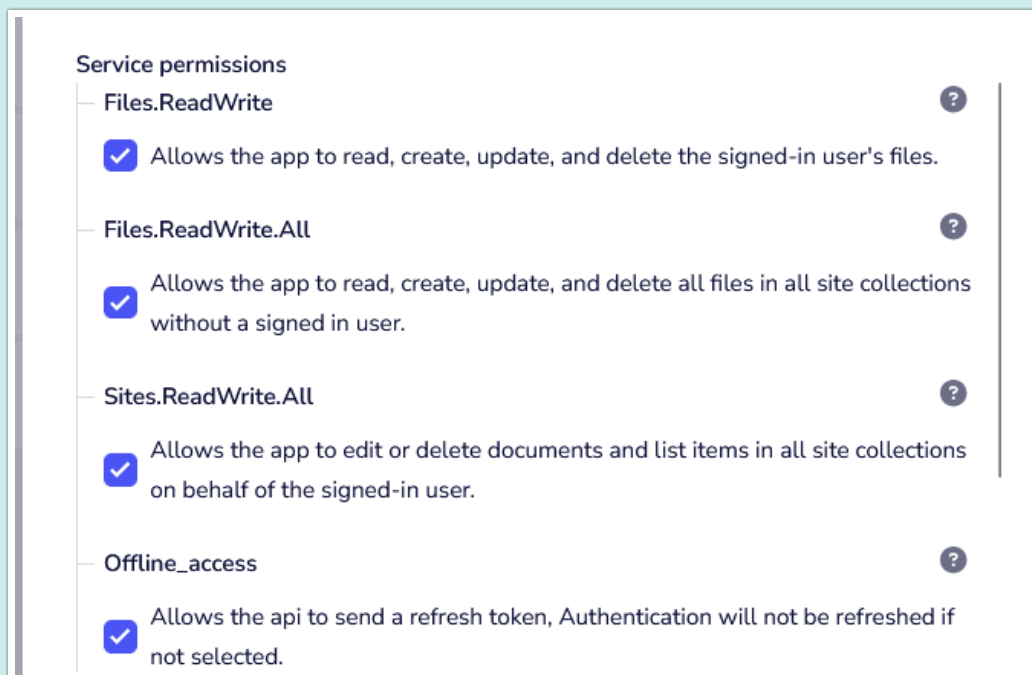
Create

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. Please select if the file you would like to use is on OneDrive or SharePoint

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | OneDrive or SharePoint

Please select if the file you would like to use is on OneDrive or SharePoint

OneDrive or SharePoint*

OneDrive

8. Please enter the folder path where your Excel workbook is located.

Guidance:

- *Use / for the root folder*
- *Do not include the file name or extension*
- *Do not include "Shared Documents"*
- *Separate each folder with a slash*

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | Folder path

Please enter the folder path where your Excel workbook is located.

Example:
/MyFolder/MySubFolder

Folder path*

/

- Use / for the root folder

- Do not include the file name or extension

- Do not include "Shared Documents"

- Separate each folder with a slash

9. 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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10. 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

PreviousNext

11. Choose the Excel table that you would like to insert data into.

You will need a Table in your Excel sheet. You can create this by navigating to Insert > Table in Excel, [learn more](#).

Excel | Choose table

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

Select table*

ProjectTracker

You will need a Table in your Excel sheet. You can create this by navigating to Insert > Table in Excel, [learn more](#).

[Previous](#)

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12. Choose the fields in your survey that you would like to use to add data to.

Configure Action

PRIMARY SETUP

LOGIC

ADVANCED

Excel | Add data to table

Choose the fields in your survey that you would like to use to add data to the Excel table.

Use this Alchemer field value

to match this Excel field

[Add a new mapping](#)

Data prep options*

Strip HTML tags from inputs

[Previous](#)

Next

13. Select the fields you want to get back.

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | Get data back

Select the fields you want to get back.

Use this field

To update this Alchemer survey field

Action | Metadata | message

Question | Conversation ID (id: 113)

Add a new mapping

PreviousNext

14. 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 | Update data in Excel

Update an Excel worksheet in OneDrive or SharePoint

Excel | Get data from Excel

Get data from an Excel worksheet in OneDrive or SharePoint

Excel | Push data to Excel

Push data to an Excel table in SharePoint or OneDrive

Excel | Push structured response

Sends a structured response to an Excel workbook

Cancel

Next

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](#)

v250423


3. 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\SUBJECTS\713087708\ Office365 account ^ ...

[Add a new account](#)

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

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Excel | Authentication

Connect to your Office365 account.

 PRODUCTION\SUBJECTS\713087708\ Office365 account ^ ...

[Add a new account](#)

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Create a new authentication X

Your authentication name

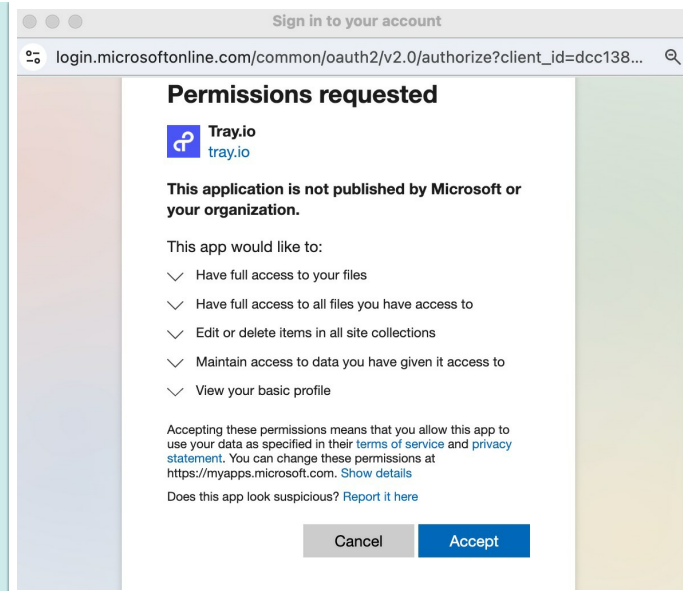
You need to type the authentication name to be able to continue.

Previous

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:

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. Please select if the file you would like to use is on OneDrive or SharePoint

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | OneDrive or SharePoint

Please select if the file you would like to use is on OneDrive or SharePoint

OneDrive or SharePoint*

OneDrive

7. Please enter the folder path where your Excel workbook is located.

Guidance:

- *Use / for the root folder*
- *Do not include the file name or extension*
- *Do not include "Shared Documents"*
- *Separate each folder with a slash*

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | Folder path

Please enter the folder path where your Excel workbook is located.

Example:
/MyFolder/MySubFolder

Folder path*

/

- Use / for the root folder

- Do not include the file name or extension

- Do not include "Shared Documents"

- Separate each folder with a slash

8. Please enter the folder path where your Excel workbook is located.

[illegible]

9. 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

▼

10. Choose the Excel table that you would like to update data into.

You will need a Table in your Excel sheet. You can create this by navigating to Insert > Table in Excel, [learn more](#).

Excel | Choose table

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

Select table*

ProjectTracker



You will need a Table in your Excel sheet. You can create this by navigating to Insert > Table in Excel, [learn more](#).



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Next

11. 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



12. 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 | Person name (id: 99)

E | Alchemer Product

Add a new mapping

Data prep options*

Strip HTML tags from inputs

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13. (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 | 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

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



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 | Update data in Excel
Update an Excel worksheet in OneDrive or SharePoint

Excel | Get data from Excel
Get data from an Excel worksheet in OneDrive or SharePoint

Excel | Push data to Excel
Push data to an Excel table in SharePoint or OneDrive

Excel | Push structured response
Sends a structured response to an Excel workbook

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](#)

v250423

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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

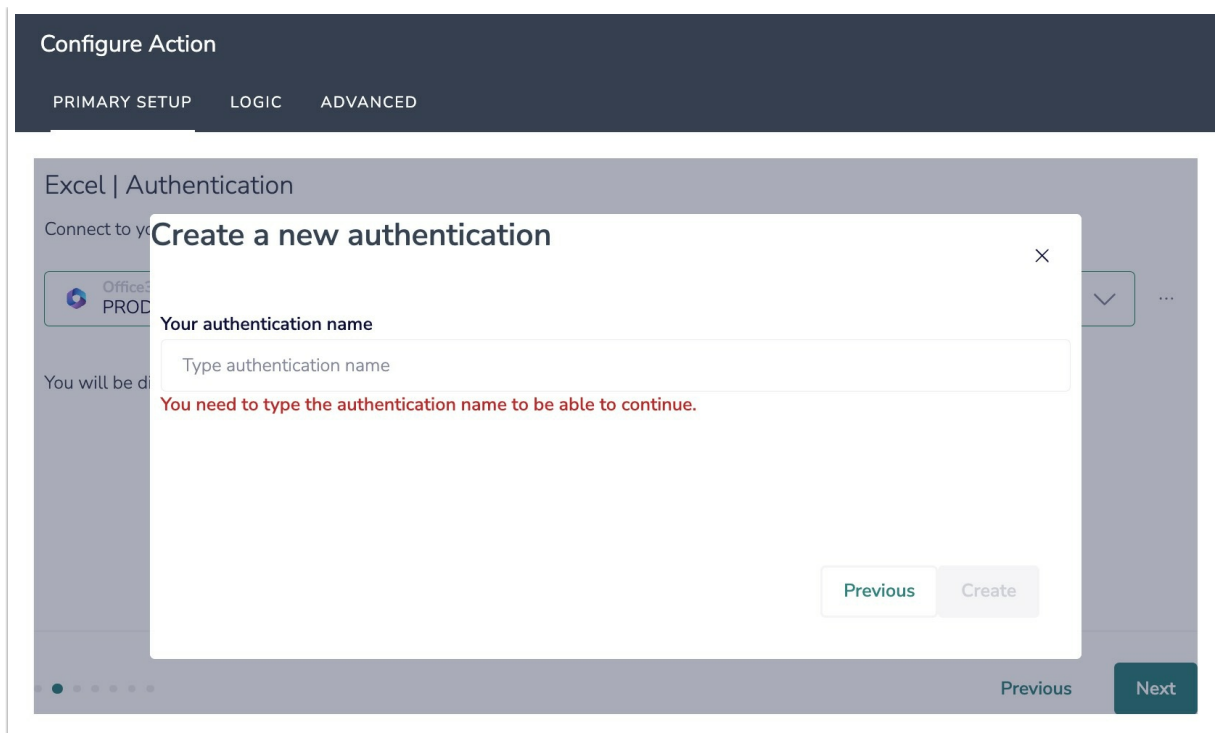
^

...

[Add a new account](#)

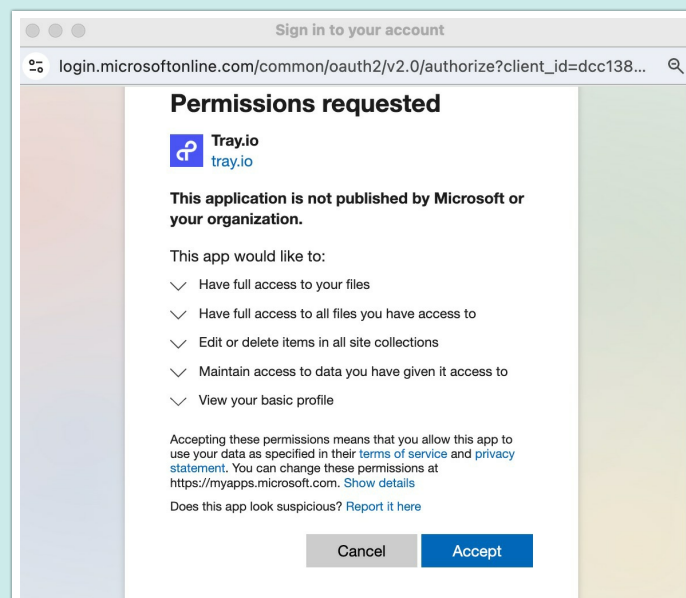
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4. Name your new authentication and click "create".



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:

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. Please select if the file you would like to use is on OneDrive or SharePoint

Configure Action

PRIMARY SETUP

LOGIC

ADVANCED

Excel | OneDrive or SharePoint

Please select if the file you would like to use is on OneDrive or SharePoint

OneDrive or SharePoint*

OneDrive

7. Please enter the folder path where your Excel workbook is located.

Guidance:

- Use / for the root folder
- Do not include the file name or extension
- Do not include "Shared Documents"
- Separate each folder with a slash

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 | Person name (id: 99)

D | Link

Add a new mapping

Input data type*

String

- Choose the data type of the column you select for the input
- Choose a unique field to query on as this only supports a single field
- This will get the first match found

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12. 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

Previous

Next

13. Click "Save".



Excel | Push Structured Response

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 can be a blank workbook as this integration will build out all of the required sheets, columns, and tables in the following steps.

2. Select "Excel | Push Structured Response" as your action.

Configure Action

PRIMARY SETUPLOGICADVANCED

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Select Action

Select the action you would like to perform.

Excel | Update data in Excel

Update an Excel worksheet in OneDrive or SharePoint

Excel | Get data from Excel

Get data from an Excel worksheet in OneDrive or SharePoint

Excel | Push data to Excel

Push data to an Excel table in SharePoint or OneDrive

Excel | Push structured response

Sends a structured response to an Excel workbook

Cancel

Next

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




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

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | Authentication

Connect to your Office365 account.

 PRODUCTION\JULIETTE.F1087708's Office365 account

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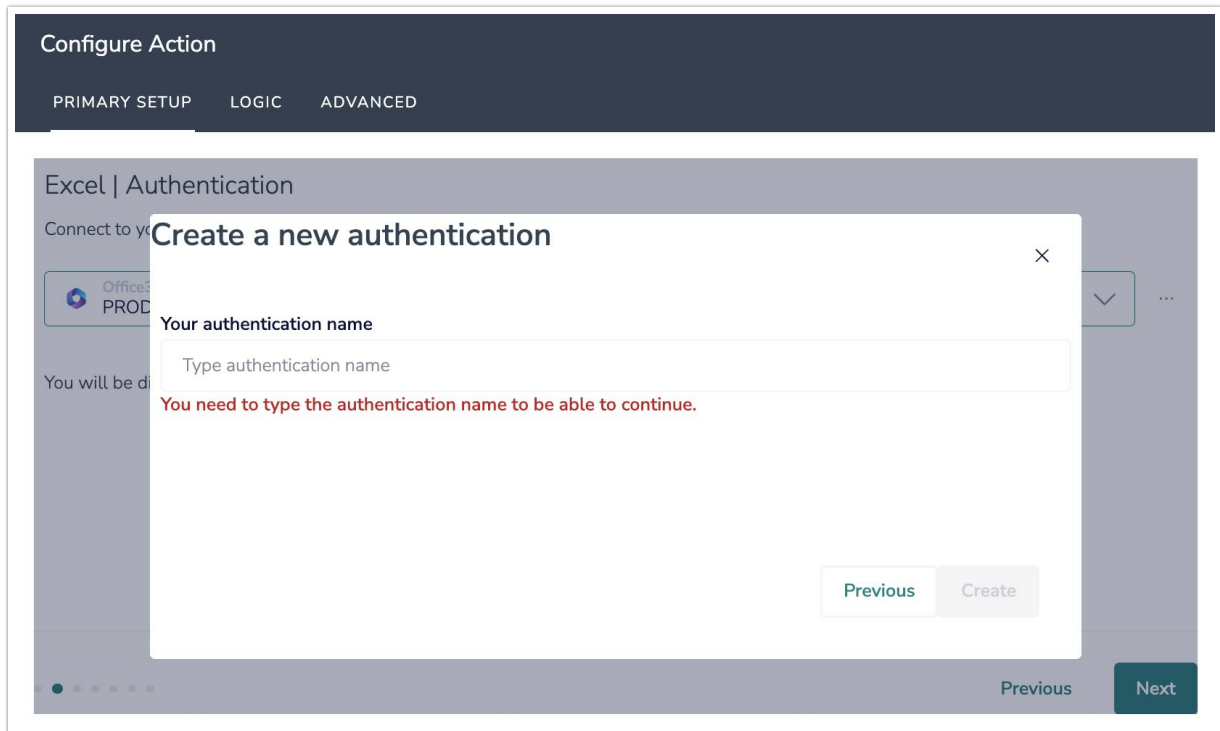
...

[Add a new account](#)

Previous

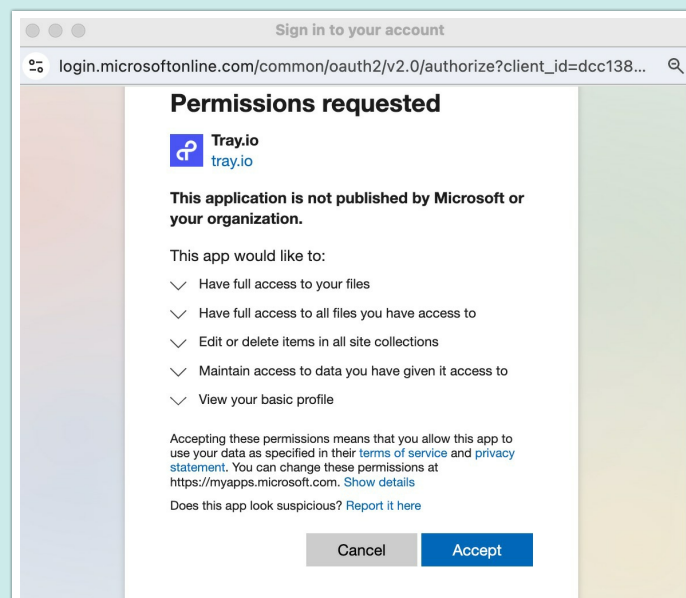
Next

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



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.



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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.

7. Please select if the file you would like to use is on OneDrive or SharePoint

Configure Action

PRIMARY SETUP

LOGIC

ADVANCED

Excel | OneDrive or SharePoint

Please select if the file you would like to use is on OneDrive or SharePoint

OneDrive or SharePoint*

OneDrive

8. Please enter the folder path where your Excel workbook is located.

Guidance:

- Use / for the root folder
- Do not include the file name or extension
- Do not include "Shared Documents"
- Separate each folder with a slash

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | Folder path

Please enter the folder path where your Excel workbook is located.

Example:
/MyFolder/MySubFolder

Folder path*

/

- Use / for the root folder

- Do not include the file name or extension

- Do not include "Shared Documents"

- Separate each folder with a slash

9. 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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10. Checking if your Excel sheets and tables are already built. This is used in the next steps to construct the sheest and tables if necessary.

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Excel | Checking sheets and tables

Checking if your Excel sheets and tables are already built. This is used in the next steps to construct the sheets and tables if necessary.

Click next when this page is finished loading.

[illegible][Previous](#)

Next

11. Building sheets in your workbook, if not already built.

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Excel | Creating sheets

Building sheets in your workbook, if not already built.

Click next when this page is finished loading.

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Next

12. Building the header row in your workbook for each sheet, if not already built.

[illegible]

15. Choose the questions/survey fields you want to push to Excel.

[illegible]

16. Pushing question metadata to Excel for the selected question.

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | Pushing question data

Pushing question metadata to Excel for the selected questions.

Click next when this page is finished loading.

17. Select the fields you want to get back. This is optional.

[illegible]

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

Configure Action

PRIMARY SETUP LOGIC ADVANCED

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 pushed to Excel.

400: The external integration returned an error.

● ● ● ● ● ● ● ● ● ● ● ● ● ●

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Save

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