

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:

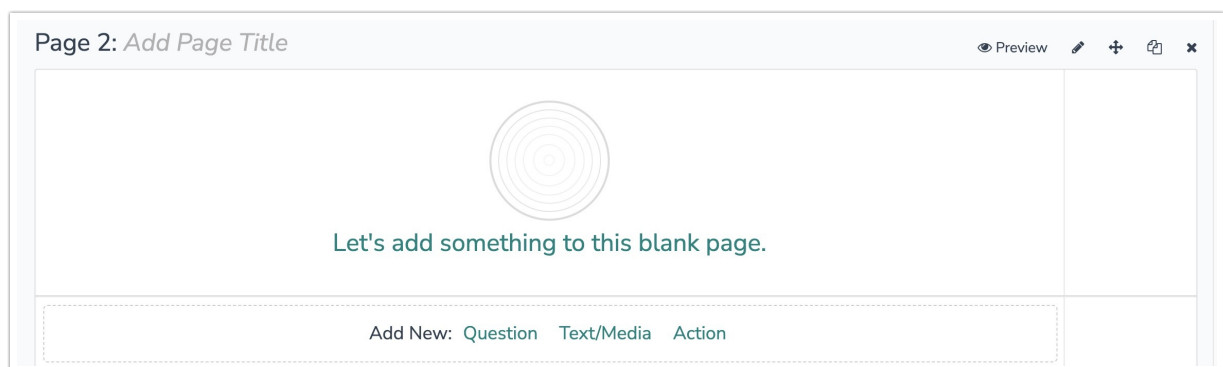
- Push survey data from Alchemer into an Excel Worksheet.
- Update an Excel Worksheet with data from Alchemer
- Get data from Excel for use in an Alchemer Survey

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".

Action Name	Description	Action
Klaviyo	Receive, update, or add records in Klaviyo	+ Add
Microsoft Dynamics 365	Get data from Microsoft Dynamics 365 or send data to Microsoft Dynamics 365	+ Add
Microsoft Office 365	Microsoft Office 365 integration with Alchemer	+ Add
Microsoft Power BI	Microsoft Power BI integration with Alchemer	+ Add
Salesforce	Start an Alchemer Workflow from an event in Salesforce	+ Add
Shopify	Get data from Shopify or send data to Shopify	+ Add
Snowflake	Snowflake Integration with Alchemer	+ Add

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 SETUP LOGIC ADVANCED

< 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

Excel | Push Data to Excel

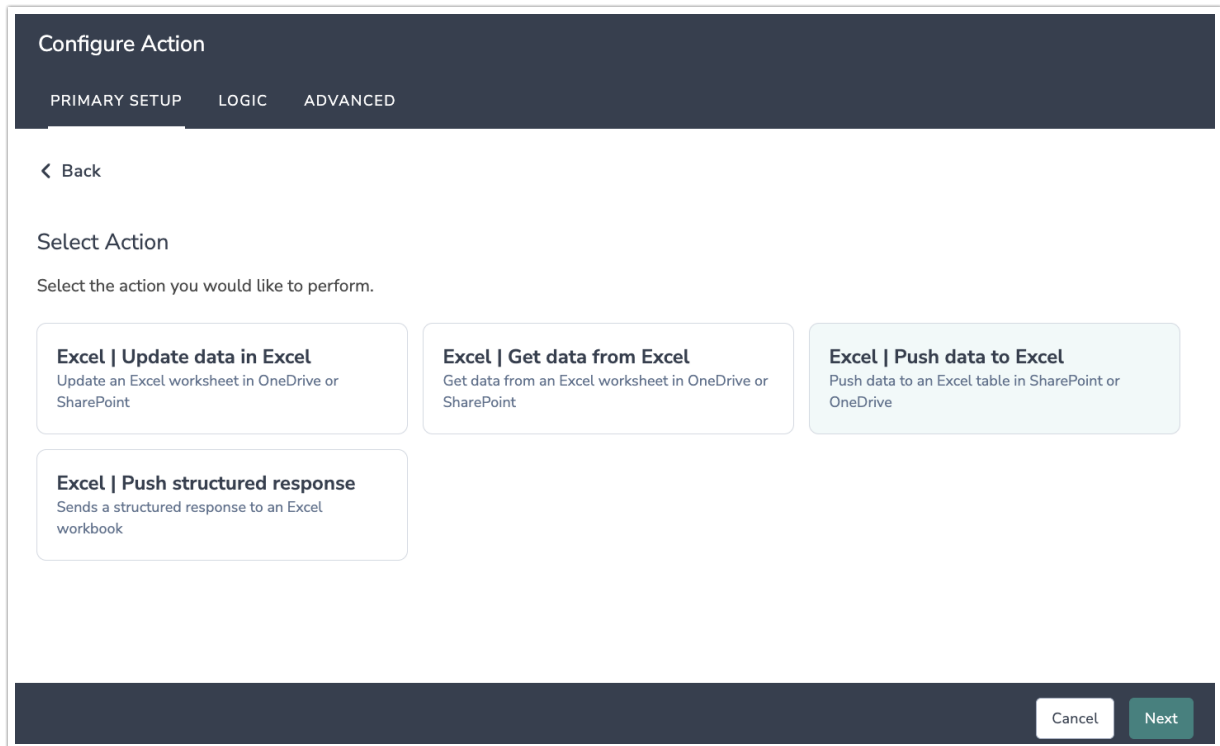
Before configuring this integration action, you will need:

- 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)

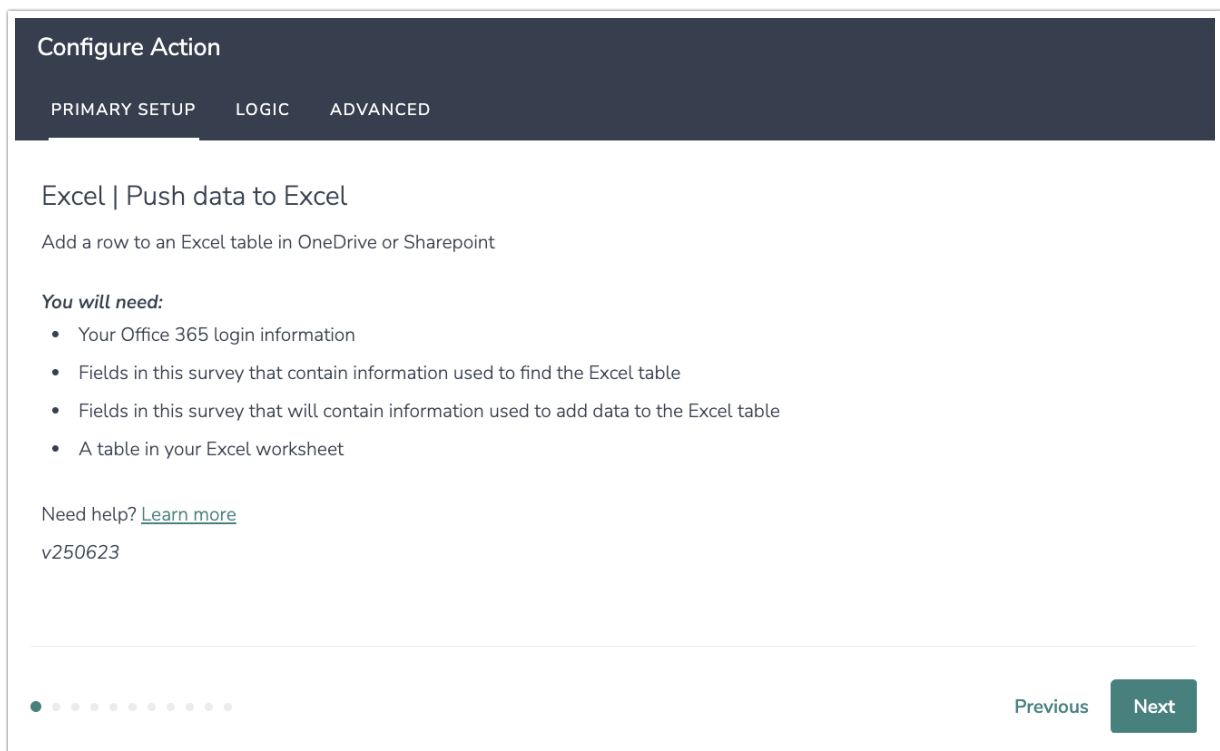
1. You will need to first create an Excel worksheet within a workbook.

This worksheet must contain a header row with column titles.

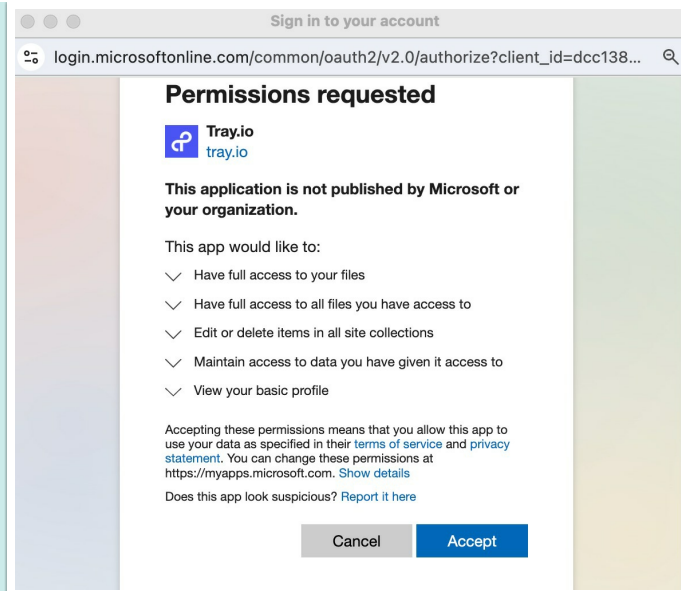
2. Select "Excel | Push Data to Excel" as your action.



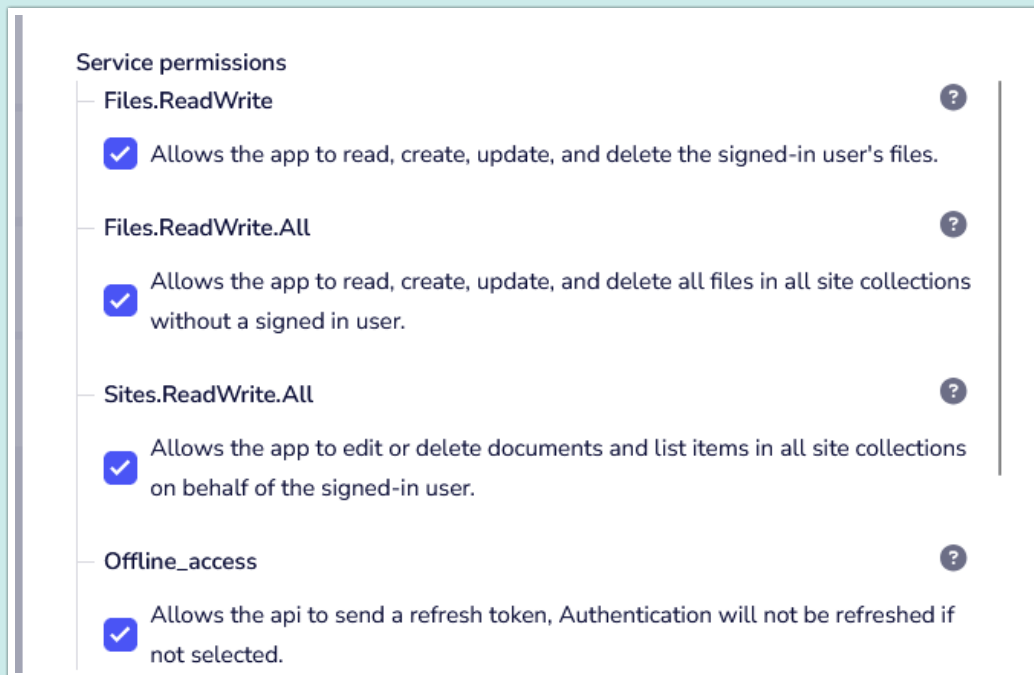
3. Click "Next" on the integration overview screen.



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



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 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 SETUP LOGIC ADVANCED

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 SETUP LOGIC ADVANCED

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

Previous Next

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

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Excel | Choose Worksheet

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

Select Worksheet*

Sheet1

Previous Next

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 Next

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 SETUP LOGIC ADVANCED

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

Previous Next

14. 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:

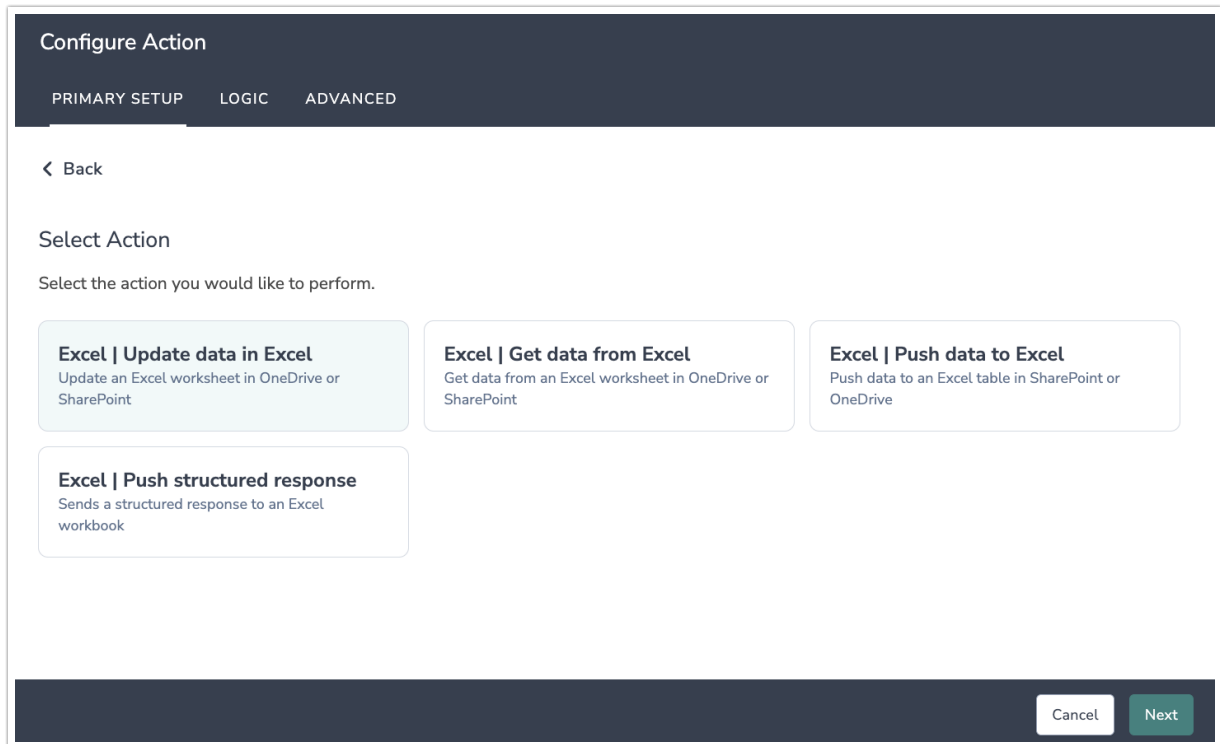
- 200: Successfully updated Excel row.
- 202: Failed to get Excel row.
- 400: The external integration returned an error.

Excel | Update Data in Excel

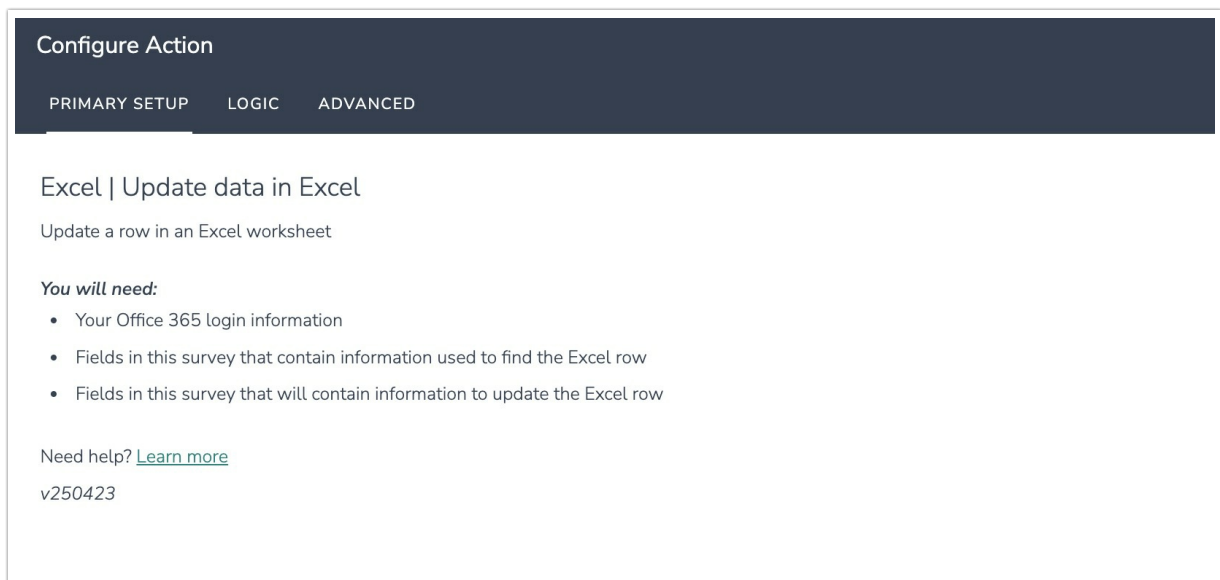
1. Select "Update data in Excel"

You will need:

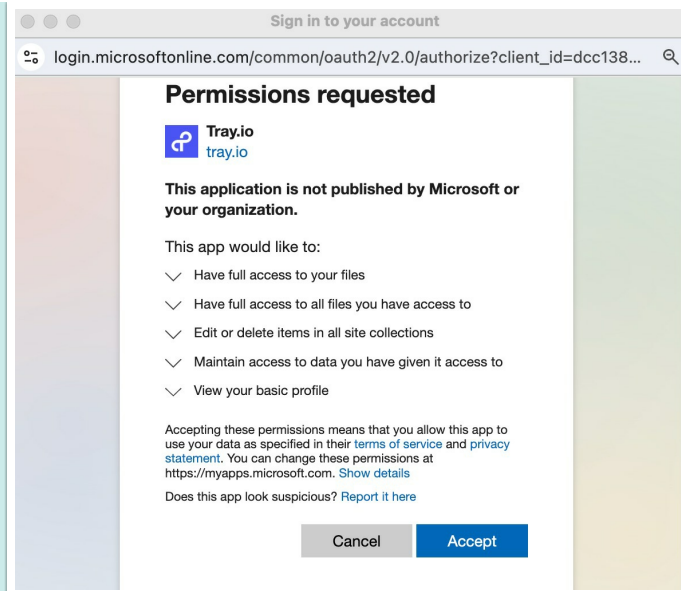
- Your Office 365 login information
- Fields in this survey that contain information used to find the Excel row
- Fields in this survey that will contain information to update the Excel row



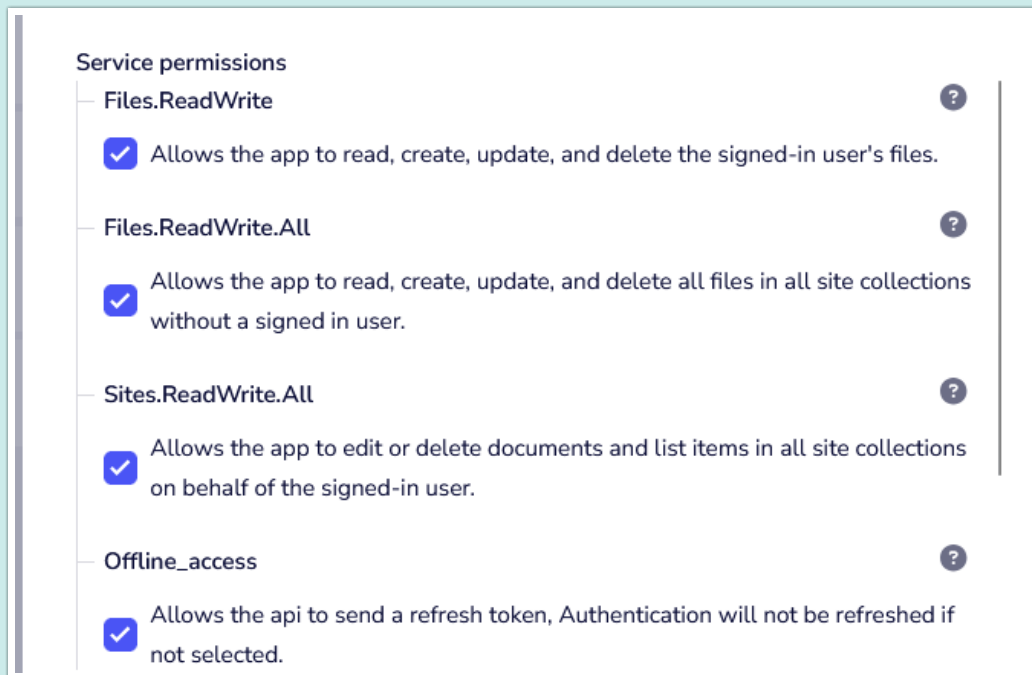
2. Click "Next" on the integration overview screen.



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



You will need the following permissions:



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 SETUP LOGIC ADVANCED

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.

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Excel | Choose workbook

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

Select Workbook*

Book 1.xlsx

Previous Next

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

Configure Action

PRIMARY SETUP LOGIC ADVANCED

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

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Excel | Find row

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

Please choose one:

Use this Alchemer field value

to match this Excel field

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

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 update the first match found



Previous

Next

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

Configure Action

PRIMARY SETUP LOGIC ADVANCED

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

Previous Next

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 SETUP LOGIC ADVANCED

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

14. 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 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 SETUP LOGIC ADVANCED

< 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

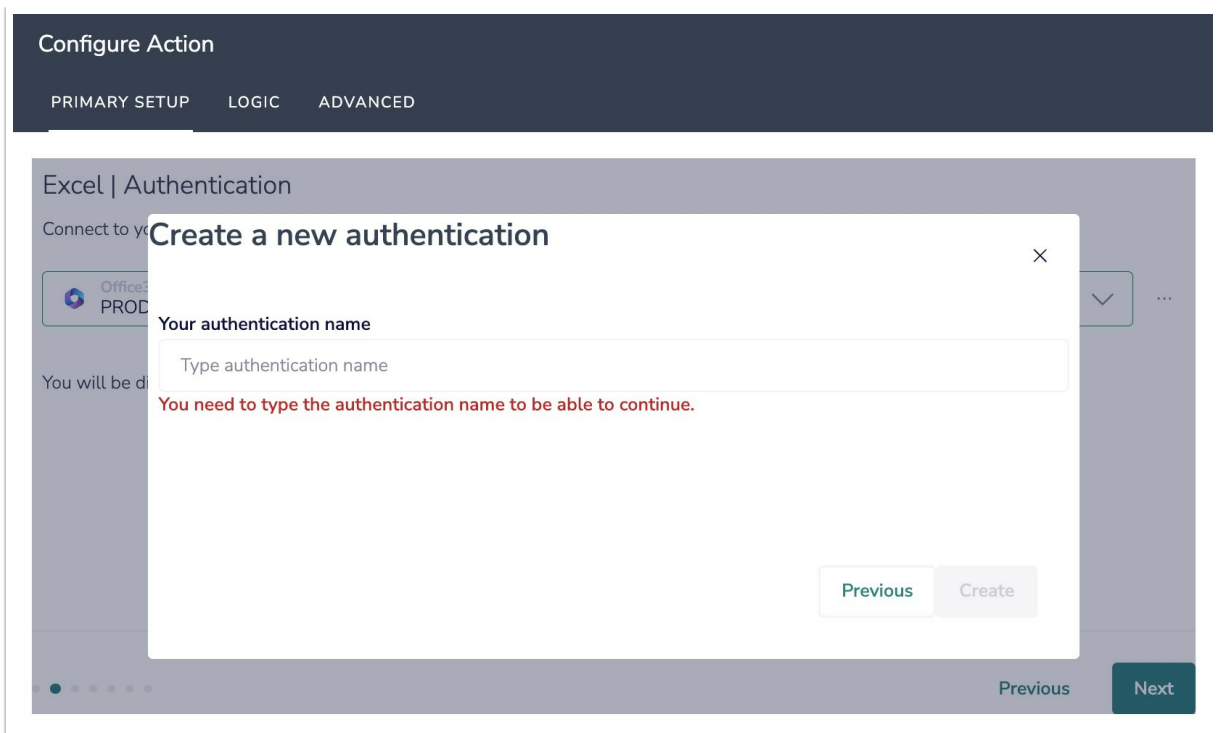
2. Click "Next" on the integration overview screen.

The screenshot shows a dark blue header with the text 'Configure Action'. Below the header are three tabs: 'PRIMARY SETUP', 'LOGIC', and 'ADVANCED'. The main content area has the title 'Excel | Get data from Excel' and the subtitle 'Get data from a row in Excel'. Underneath, there is a section titled 'You will need:' followed by a bulleted list: 'Your Office 365 login information', 'Fields in this survey that contain information to use to find the Excel row', and 'Fields in this survey where you want to save the Excel data'. Below the list is a link 'Need help? Learn more' and the version number 'v250423'. At the bottom right, there are 'Previous' and 'Next' buttons, with 'Next' being highlighted in green. A progress indicator with six dots is visible at the bottom left.

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

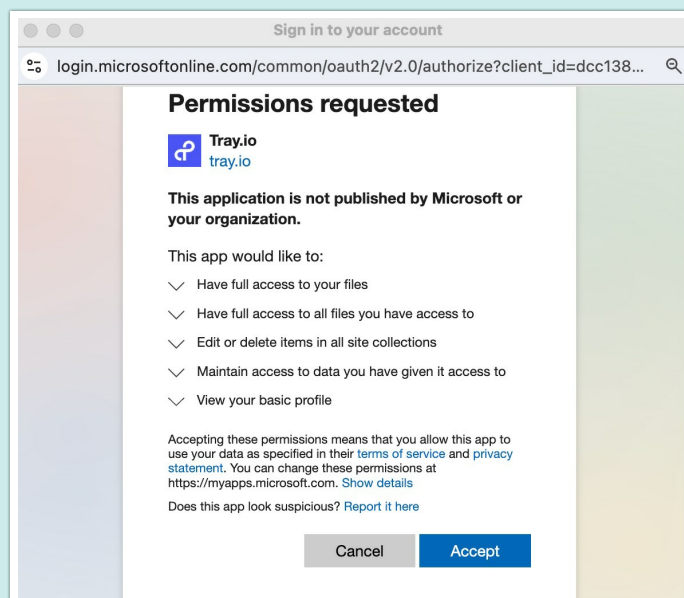
The screenshot shows a dark blue header with the text 'Configure Action'. Below the header are three tabs: 'PRIMARY SETUP', 'LOGIC', and 'ADVANCED'. The main content area has the title 'Excel | Authentication' and the subtitle 'Connect to your Office365 account.'. Below the subtitle is a dropdown menu showing a selected Office 365 account with a blue icon and a list of characters. To the right of the dropdown is an upward arrow and three dots. Below the dropdown is a button labeled 'Add a new account'. At the bottom right, there are 'Previous' and 'Next' buttons, with 'Next' being highlighted in green. A progress indicator with six dots is visible at the bottom left.

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

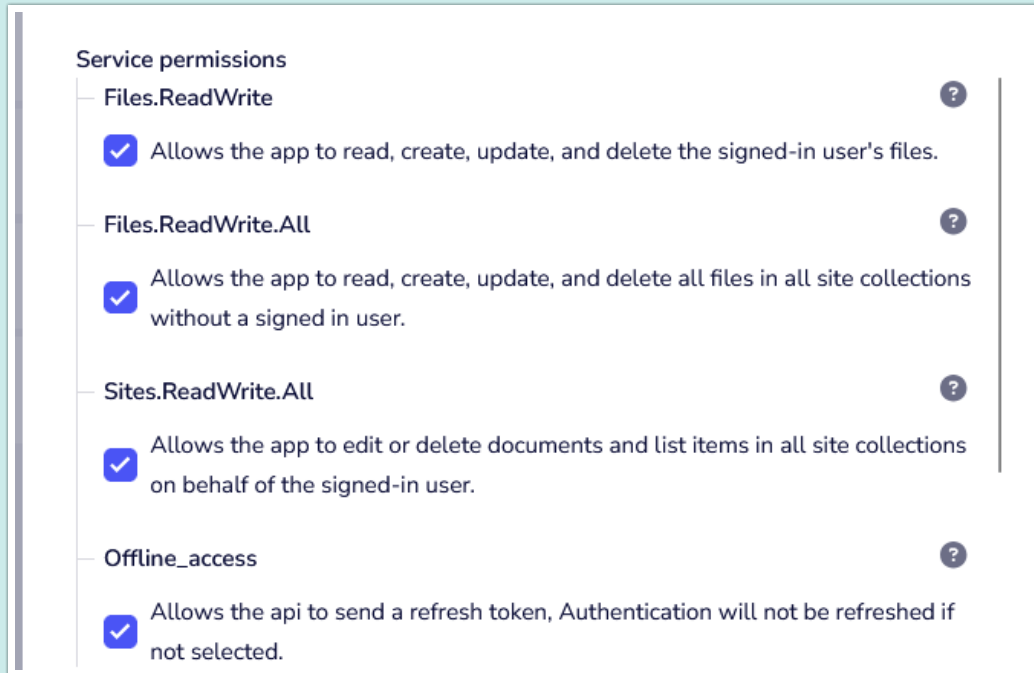


5. In the sign-in window that appears input your Microsoft 365 credentials. Once complete, return to the setup wizard in Alchemer.

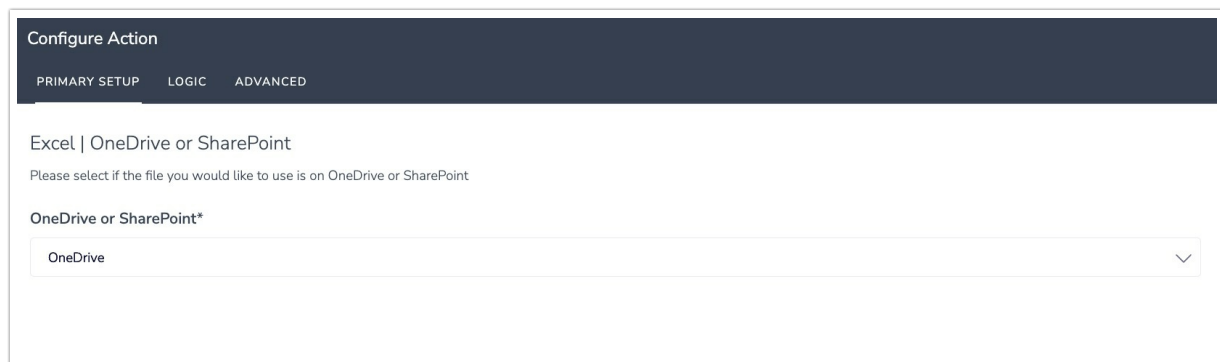
After signing in you will need to grant Alchemer (Tray.io) access to Microsoft 365.



You will need the following permissions:



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



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 SETUP LOGIC ADVANCED

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

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Excel | Choose workbook

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

Select Workbook*

Progress indicator: 10 dots, 4th dot highlighted.

Previous [Next](#)

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

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Excel | Choose worksheet

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

Select Worksheet*

Sheet1

Previous Next

10. Choos the Excel table you would like to use to pull the data from.

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

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Excel | Choose table

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

Select table*

Case_Studies

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

Previous Next

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

This will update the first match found.

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

Configure Action

PRIMARY SETUP LOGIC ADVANCED

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

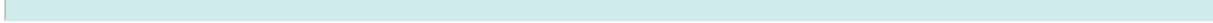
- Choose the data type of the column you select for the input
- Choose a unique field to query on as this only supports a single field
- This will get the first match found

Previous Next

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 SETUP LOGIC ADVANCED

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

Progress: 1 of 5 steps (2nd step active)

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

13. Click "Save".

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 pulled Excel row.
- 202: Failed to get Excel row.
- 400: The external integration returned an error.

Progress: 5 of 5 steps (5th step active)

[Previous](#) [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 SETUP LOGIC ADVANCED

< 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

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

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Excel | Push structured response to Excel

Builds and sends a structured response to Excel

- A structured response is a database-like format with separate tables/worksheets for questions, sessions, and question responses.
- Provides consistent columns across questions and across surveys.
- Useful for exporting data with consistent columns/schema.

You will need:

- Your Office 365 login information
- An Excel worksheet on OneDrive or Sharepoint

Need help? [Learn more](#)

v250703

Previous **Next**


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

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Excel | Authentication

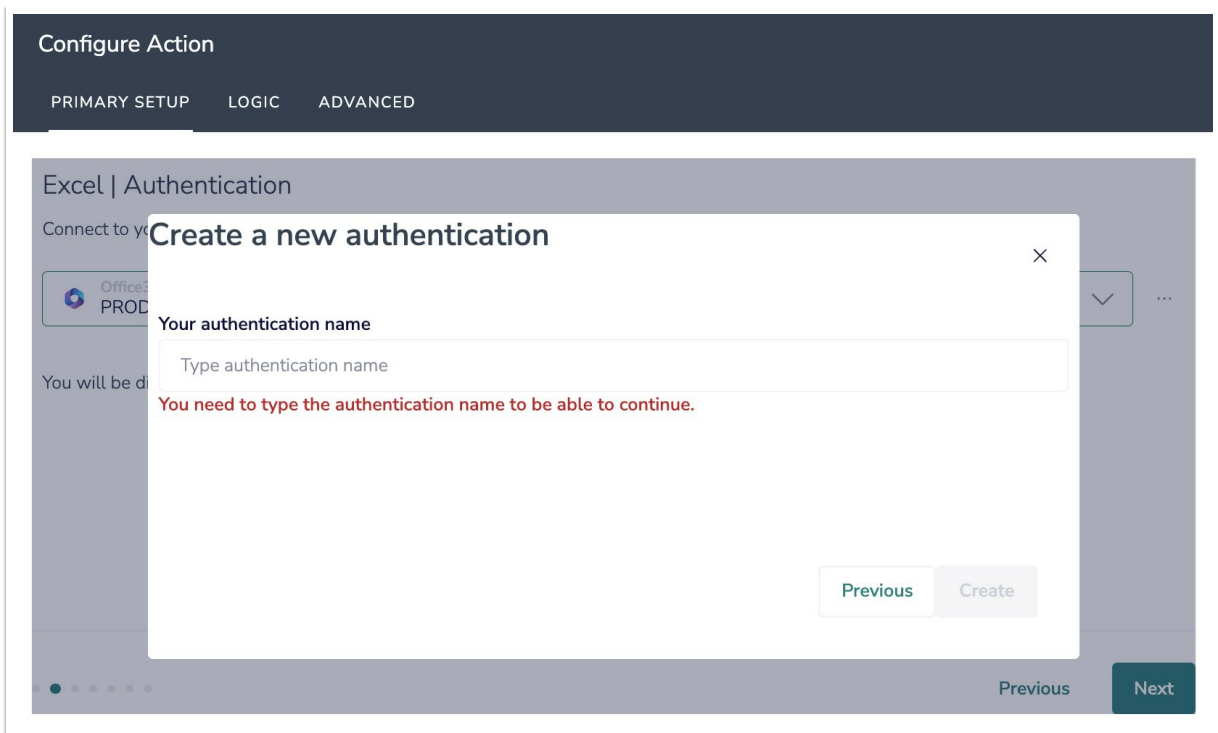
Connect to your Office365 account.

 PRODUCTION\JAC754875175877085 Office365 account ^ ...

[Add a new account](#)

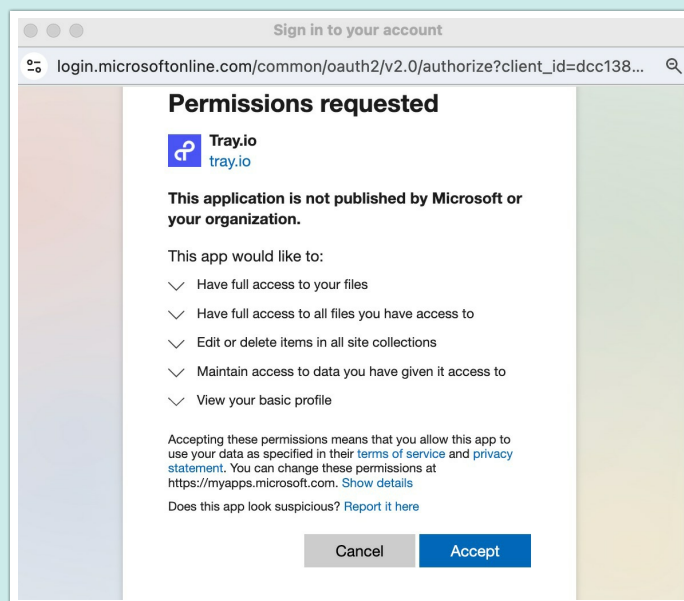
Previous **Next**

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

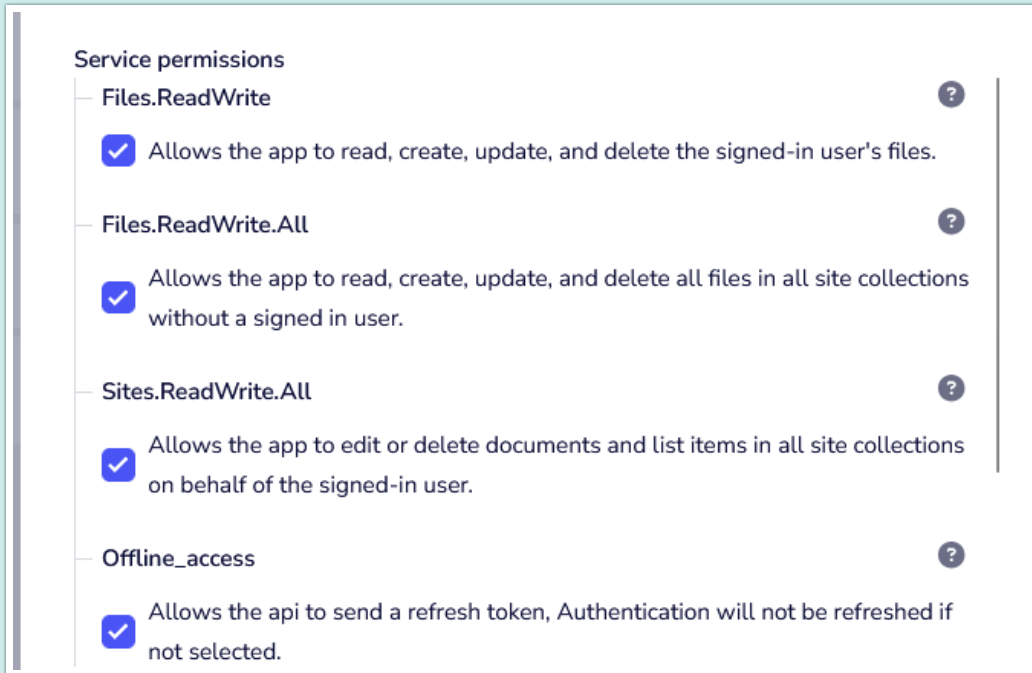


6. In the sign-in window that appears input your Microsoft 365 credentials. Once complete, return to the setup wizard in Alchemer.

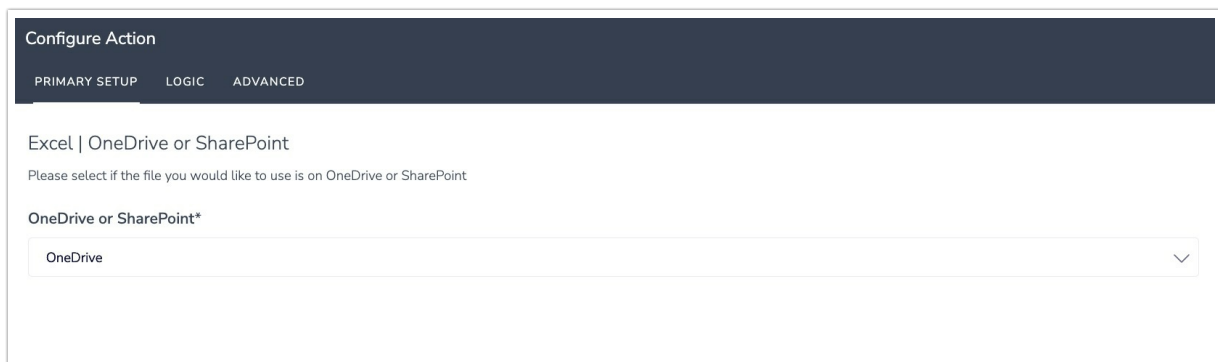
After signing in you will need to grant Alchemer (Tray.io) access to Microsoft 365.



You will need the following permissions:



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



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 SETUP LOGIC ADVANCED

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 SETUP LOGIC ADVANCED

Excel | Choose Workbook

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

Select Workbook*

Progress indicator: 5 dots, 2nd dot active

Previous **Next**

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.

Progress indicator: 12 dots, 12th dot highlighted.

Navigation: Previous (text), Next (button)

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.

Progress indicator: 12 dots, 12th dot highlighted.

Navigation: Previous (text), Next (button)

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

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Excel | Creating headers

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

Click next when this page is finished loading.

Progress indicator: 12 dots, 11th dot active. Previous Next

13. Building the tables in your workbook for each sheet, if not already built.

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Excel | Creating tables

Building the tables in your workbook for each sheet, if not already built.

Click next when this page is finished loading.

Progress indicator: 12 dots, 11th dot active. Previous Next

14. Updating the table names in your workbook for each sheet, if not already built.

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Excel | Update tables

Updating the table names in your workbook for each sheet, if not already built.

Click next when this page is finished loading.

Progress indicator: 12 dots, 11th dot is active.

Previous **Next**

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


Configure Action

PRIMARY SETUP LOGIC ADVANCED

Excel | Select data to push

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

Select the questions you want to push Confirm selection

Question | Conversation ID (id: 113) Question | 1. Based on our customer service, how likely are... 

Add a new mapping

Data prep options*

Pass inputs as-is

Progress indicator: 12 dots, 11th dot is active.

Previous **Next**

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

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Excel | Pushing question data

Pushing question metadata to Excel for the selected questions.

Click next when this page is finished loading.

Previous **Next**

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


Configure Action

PRIMARY SETUP LOGIC ADVANCED

Excel | Get data back

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

Use this field To update this Alchemer survey field

Action | Metadata | message Question | 1. Based on our customer service, how likely are... 

Add a new mapping

Previous **Next**

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.*

..... ●

Previous [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