

# 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 a Excel Worksheet.

## Video Walkthrough

Your browser does not support HTML5 video.

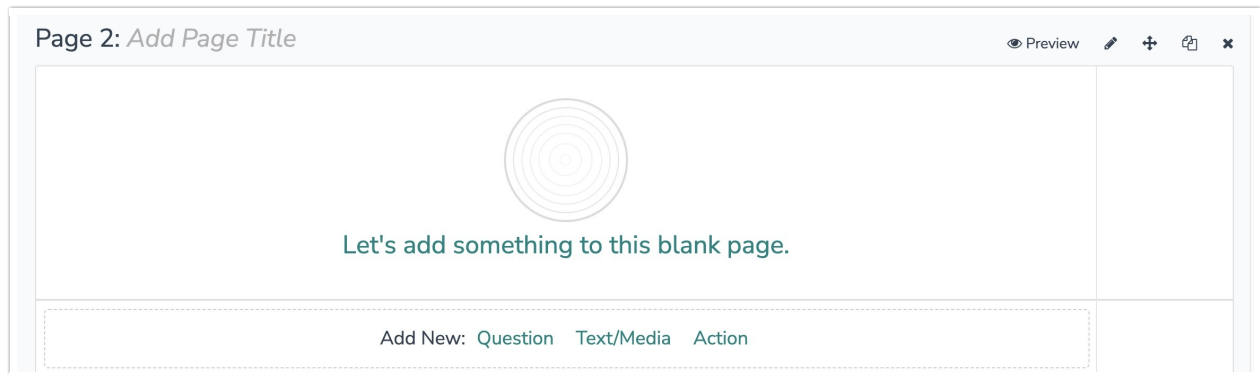
## Integration Setup

### Adding an Integration Action

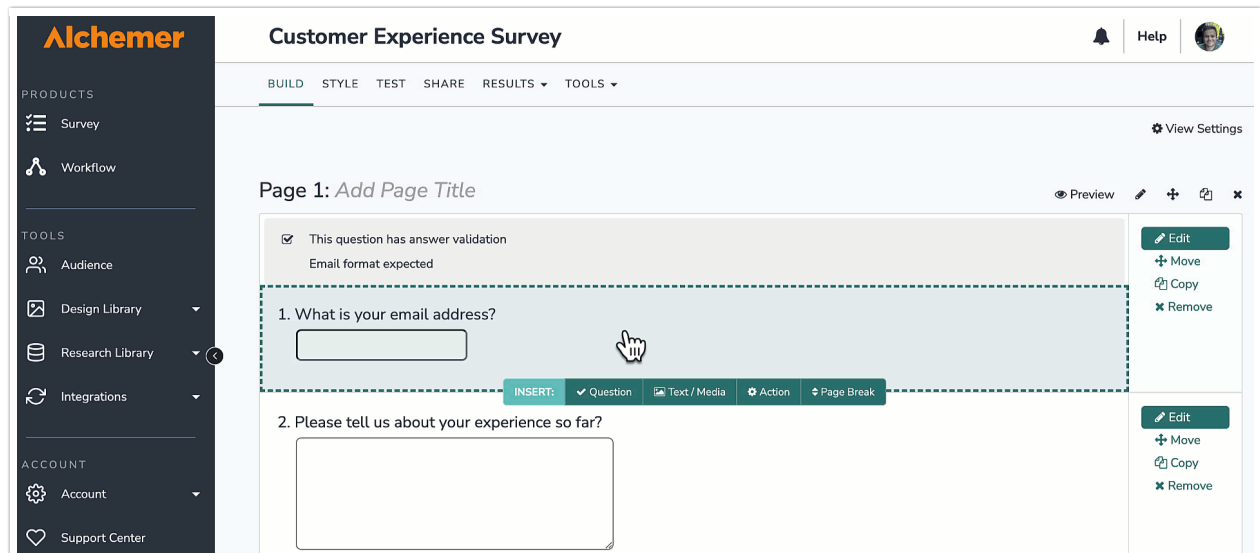
1. Select an existing survey or create a new survey. Then navigate to the Survey Builder.

2. Click "Add New: Action"

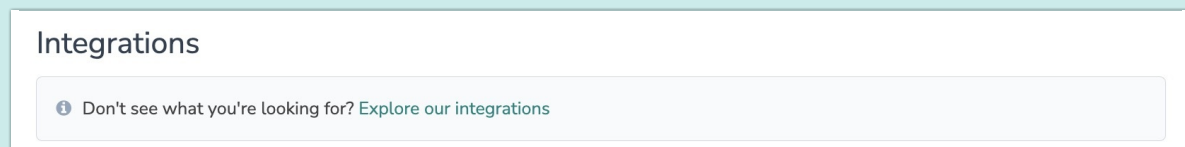
You cannot add this Integration Action to the first page of the survey.



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".

**Actions**

ADD ACTION ♥ Need Help?

|                               |   |       |
|-------------------------------|---|-------|
| <b>Klaviyo</b>                | Receive, update, or add records in Klaviyo                                  | + Add |
| <b>Microsoft Dynamics 365</b> | Get data from Microsoft Dynamics 365 or send data to Microsoft Dynamics 365 | + Add |
| <b>Microsoft Office 365</b>   | Microsoft Office 365 integration with Alchemer                              | + Add |
| <b>Microsoft Power BI</b>     | Microsoft Power BI integration with Alchemer                                | + Add |
| <b>Salesforce</b>             | Start an Alchemer Workflow from an event in Salesforce                      | + Add |
| <b>Shopify</b>                | Get data from Shopify or send data to Shopify                               | + Add |
| <b>Snowflake</b>              | Snowflake Integration with Alchemer   | + Add |

Cancel

5. Select the action you would like to perform:

- Excel: Push data to a worksheet.

**Configure Action**

PRIMARY SETUP LOGIC ADVANCED

< Back

Select Action

Select the action you would like to perform.

**Excel: Push data to a Worksheet**  
Push data to an Excel Worksheet

Cancel Next

## Excel | Push Data to a Worksheet

Before configuring this integration action, you will need:

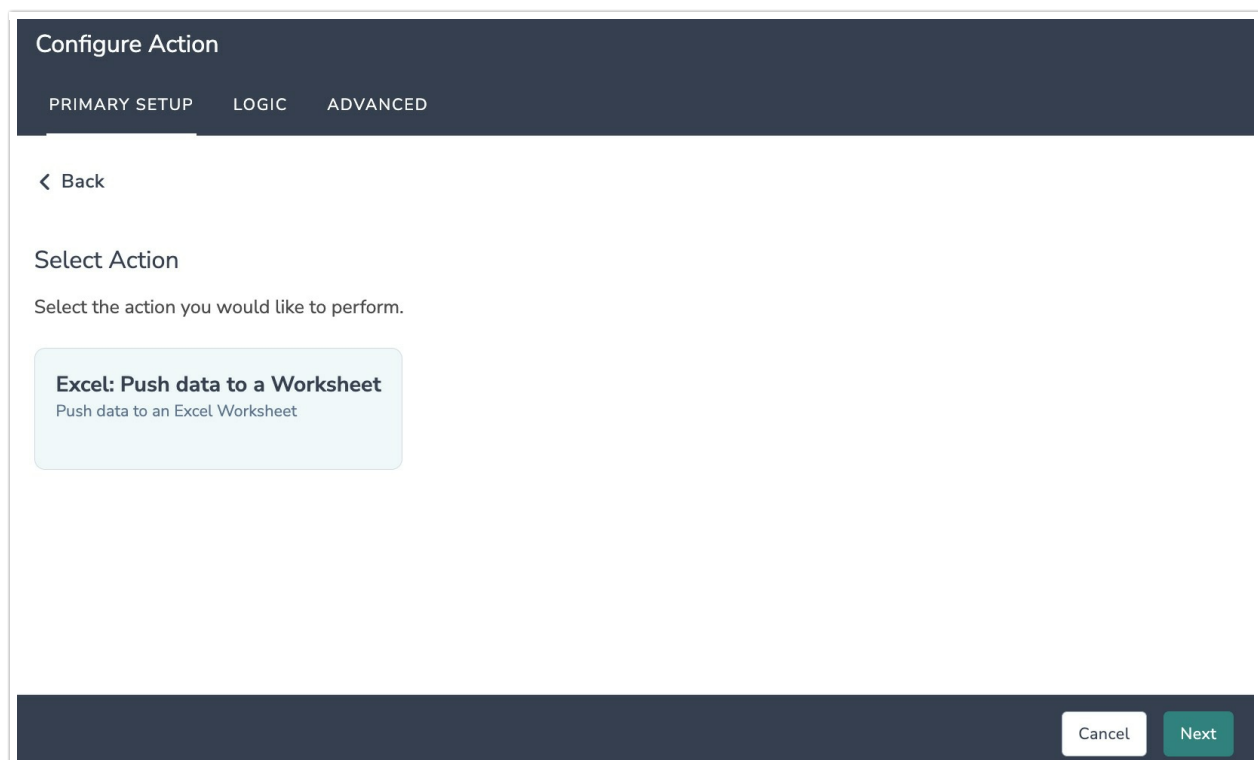
- Your Office 365 login information.

- 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 a Worksheet" as your action.



The screenshot shows a 'Configure Action' screen with three tabs: 'PRIMARY SETUP', 'LOGIC', and 'ADVANCED'. The 'PRIMARY SETUP' tab is active. Below the tabs is a '< Back' link. The main section is titled 'Select Action' and contains the instruction 'Select the action you would like to perform.' A single action card is visible, titled 'Excel: Push data to a Worksheet' with the subtitle 'Push data to an Excel Worksheet'. At the bottom right, there are 'Cancel' and 'Next' buttons.

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

**Configure Action**

PRIMARY SETUP LOGIC ADVANCED

### 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](#)

v241111

Previous **Next**


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

**Configure Action**

PRIMARY SETUP LOGIC ADVANCED

### Excel | Authentication

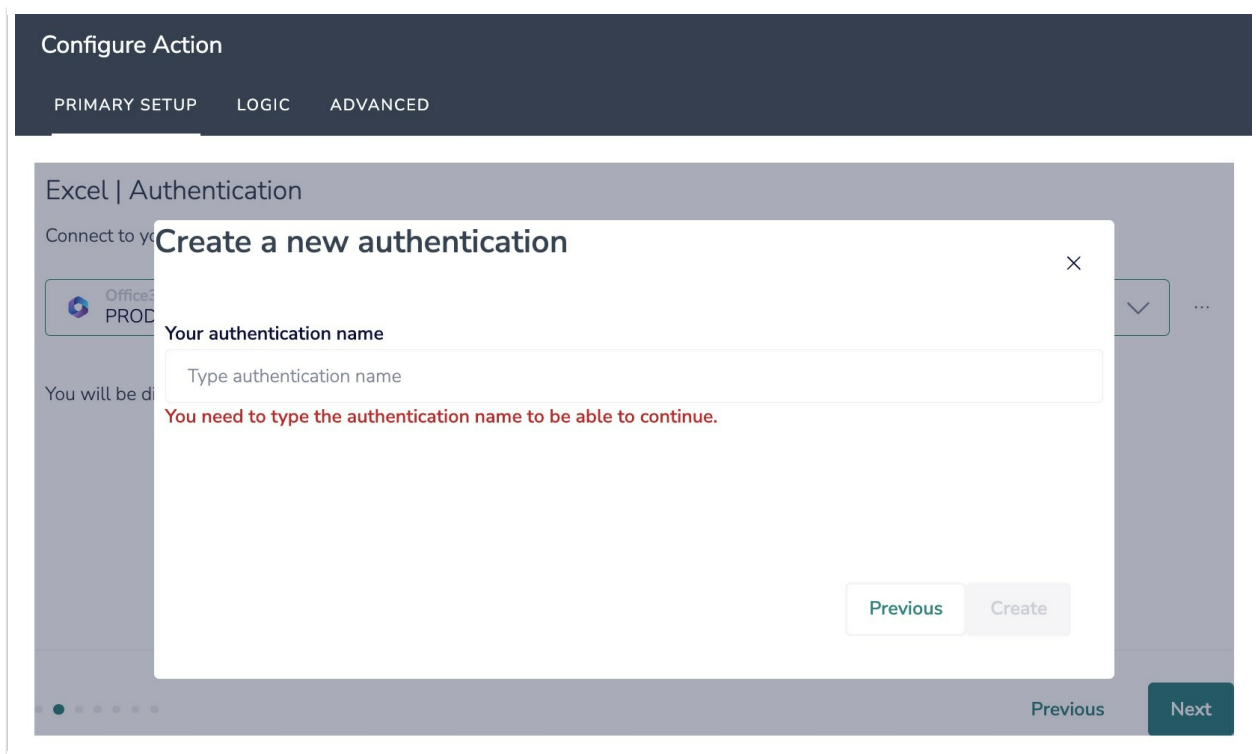
Connect to your Office365 account.

 ...

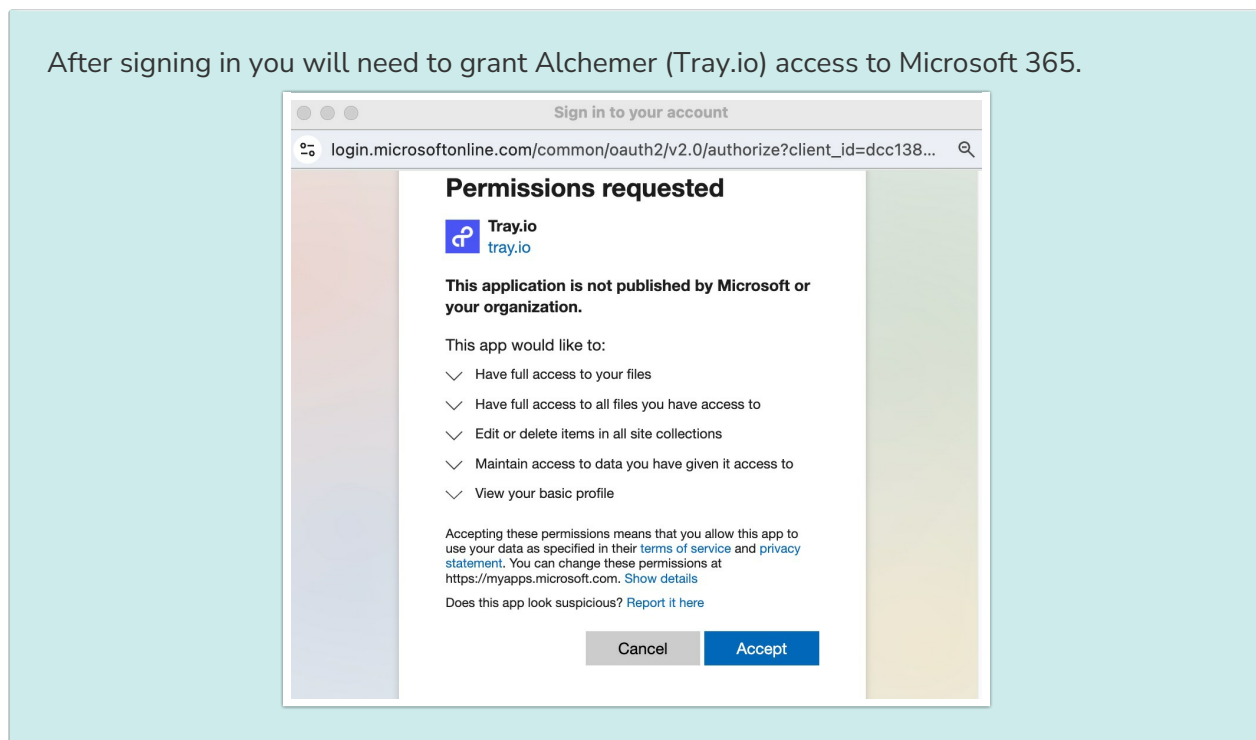
[Add a new account](#)

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.



7. 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

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8. 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

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.

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### 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

Previous Next

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*

Previous Next

11. 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.



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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