Unanet Initiator for Alchemer Workflow

> The Unanet initiator is available for purchase as an add-on. If you are interested in purchasing, please contact us for additional information.

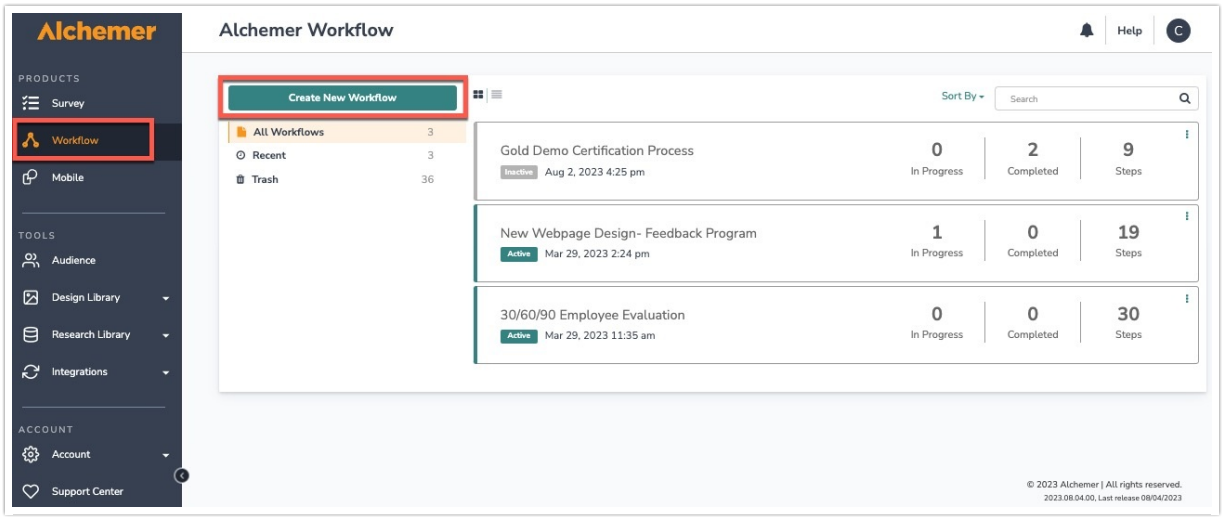
Overview

The Unanet initiator combines Alchemer's advanced survey, integration, and automation capabilities with Unanet's comprehensive project management software, allowing you to automate business processes and collect feedback at every phase of a project.

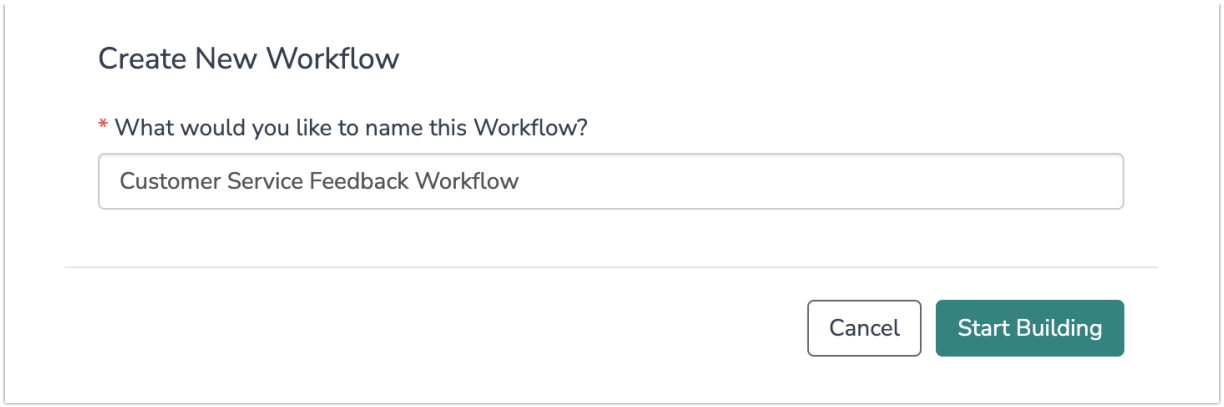
At a high level, this integration allows you to initiate workflows in Alchemer from workflows in Unanet.

Set-up

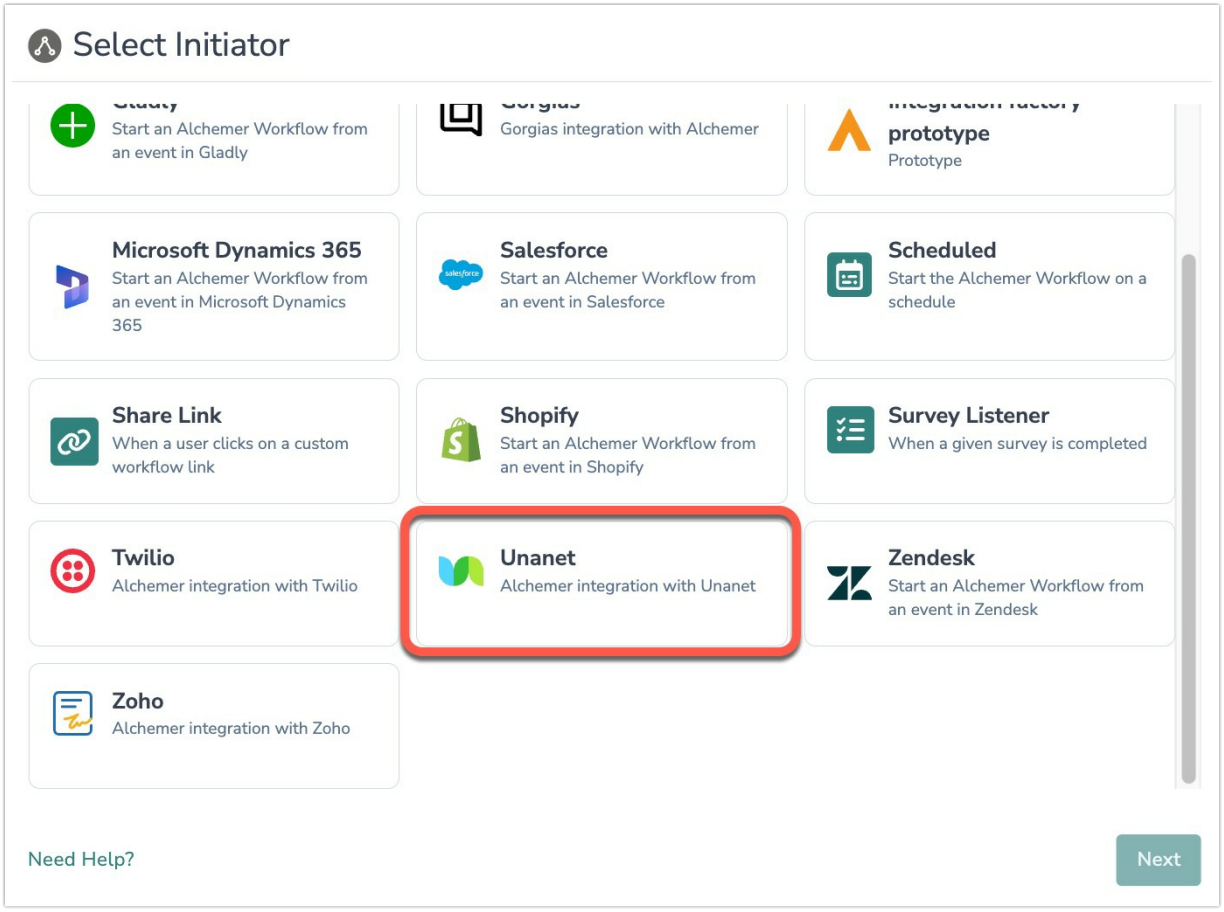
1. Create a new workflow in Alchemer.



2. Name your workflow.



3. After creating a new workflow, select Unanet as your workflow initiator.

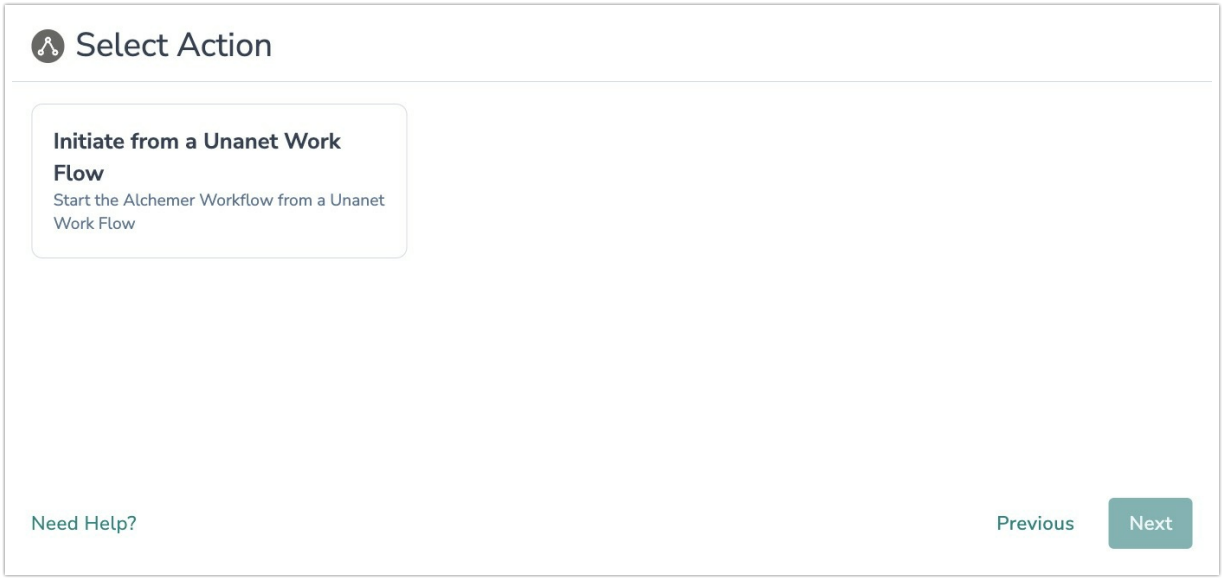


You can:

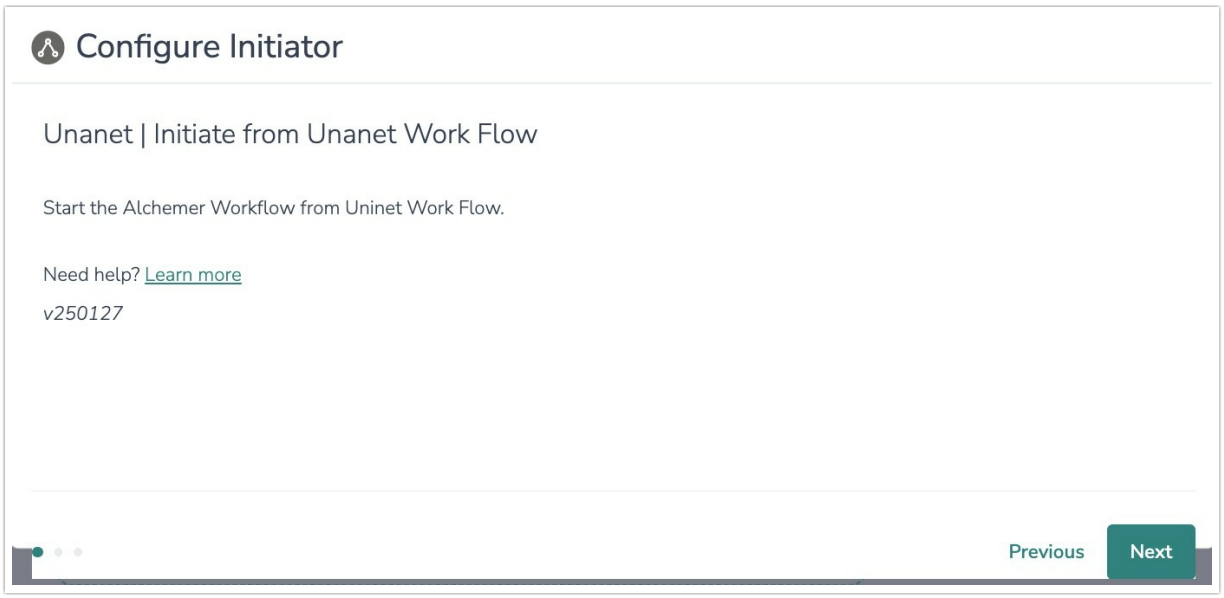
- Unanet | Initiate from a Unanet Work Flow: Jump to section
- Unanet | Initiate for each project reference: Jump to section

Unanet | Initiate from a Unanet Work Flow

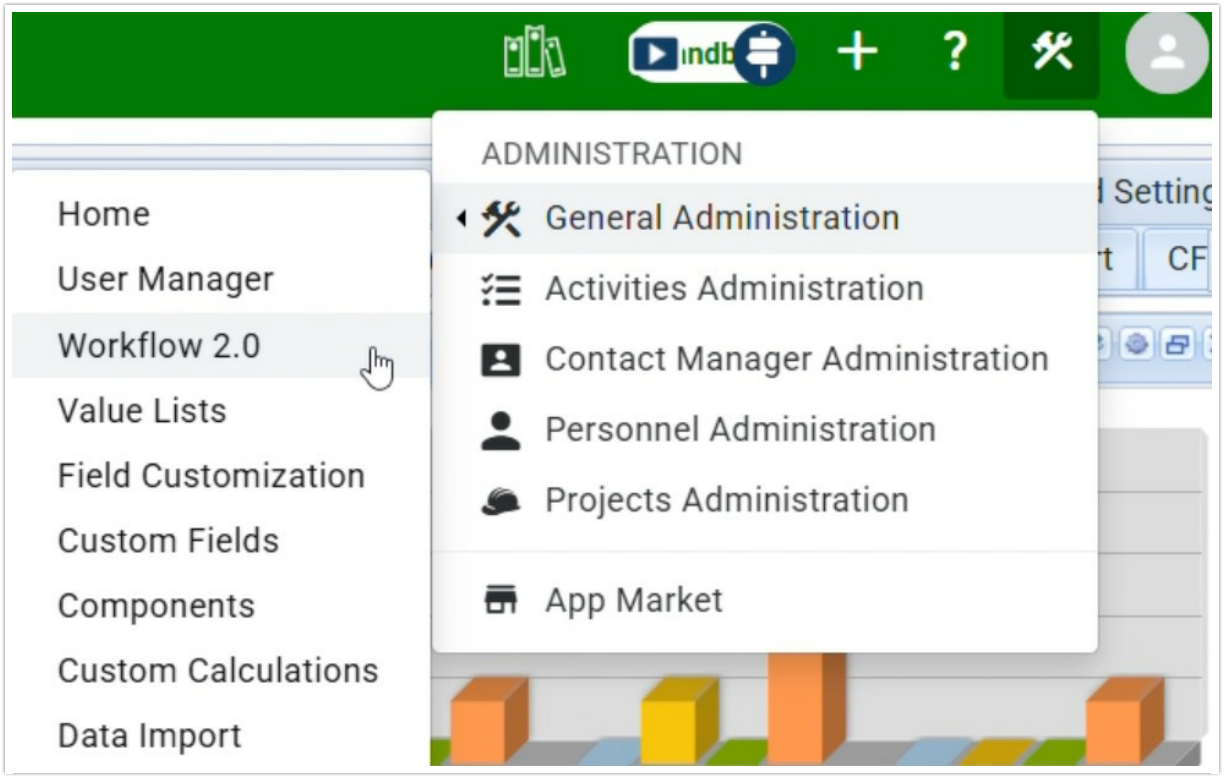
4. Select "Initiate from a Unanet Work Flow"



5. Click next on the initiator overview screen.

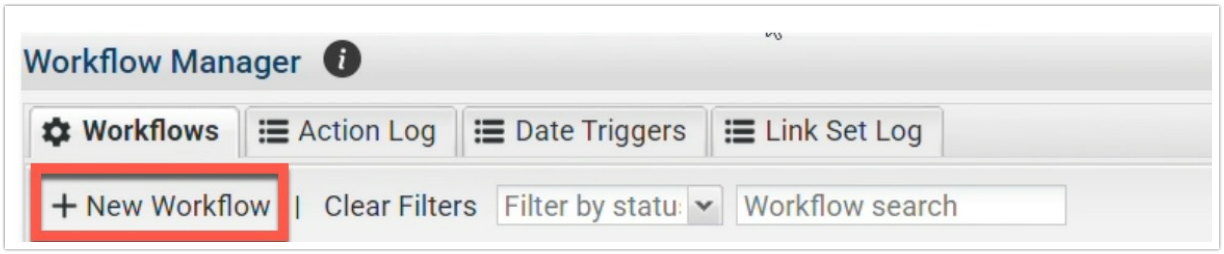


6. In your Unanet account, create a new workflow or select an existing workflow. To create a workflow in Unanet navigate to Administration > General Administration > Workflow 2.0.

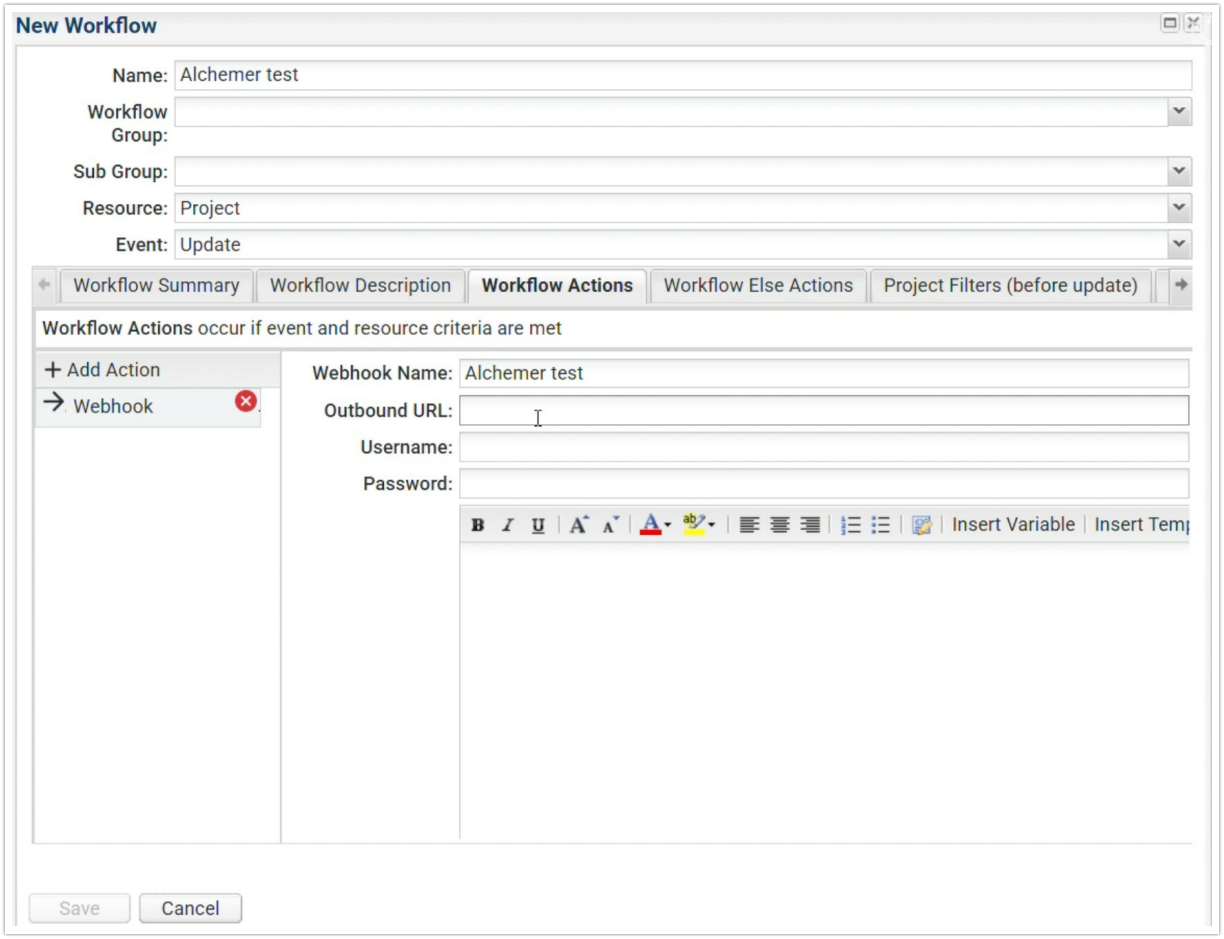


For more information on using and building workflows in Unanet, refer to their documentation here. You will need to input your Unanet login credentials before accessing their documentation.

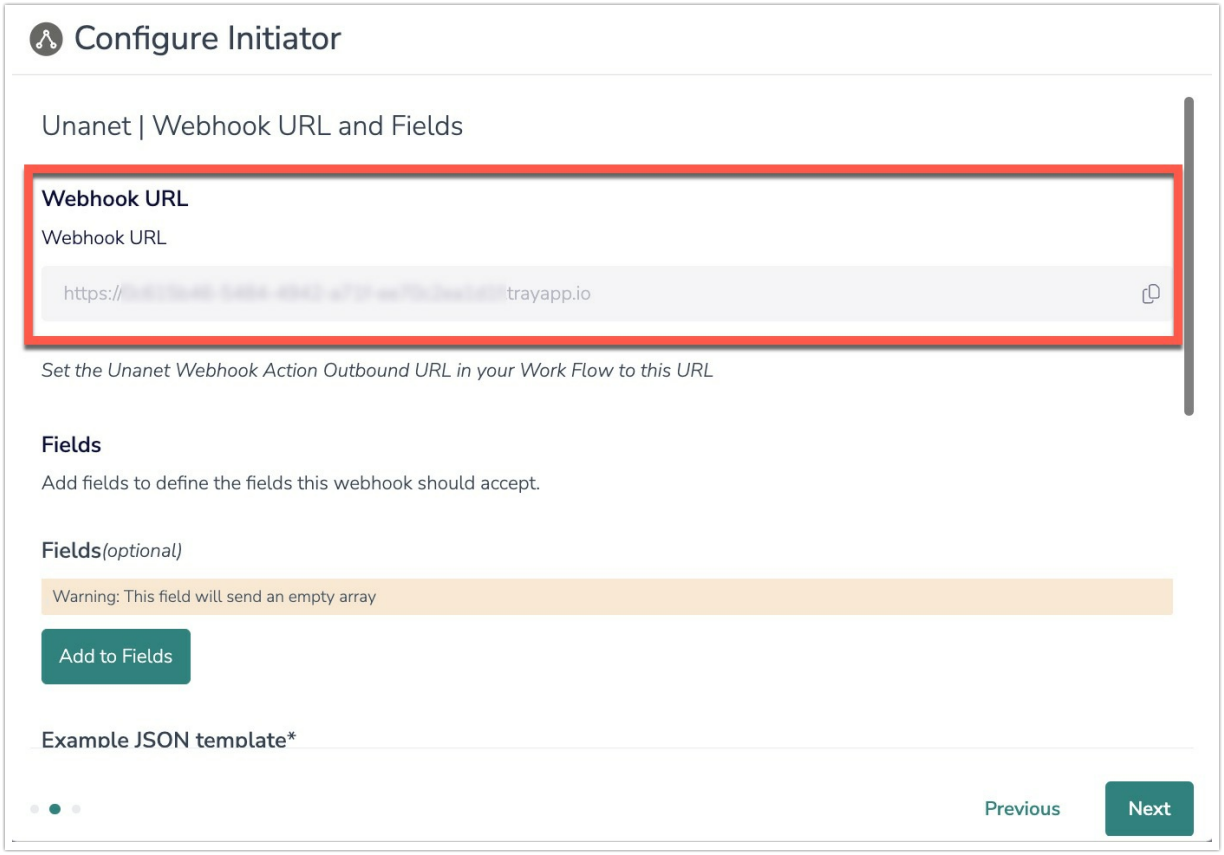
7. Click "+ New Workflow"



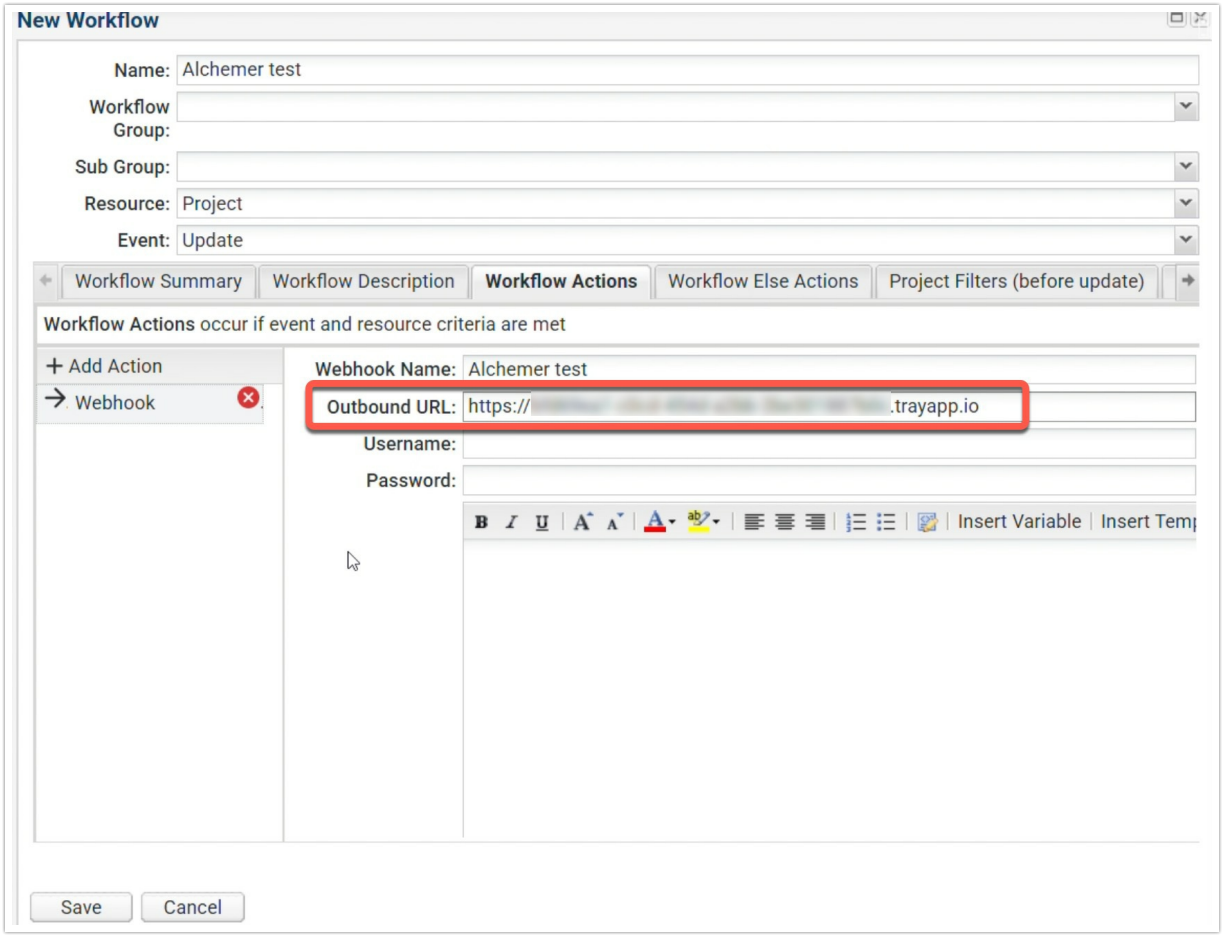
8. Name your new workflow and choose your event and resource. Then under the Workflow Actions tab, click "+ Add Action", set that action to "Webhook". Name the webhook then return to Alchemer Workflow to get the Outbound URL.



9. In Alchemer, copy the webhook URL.

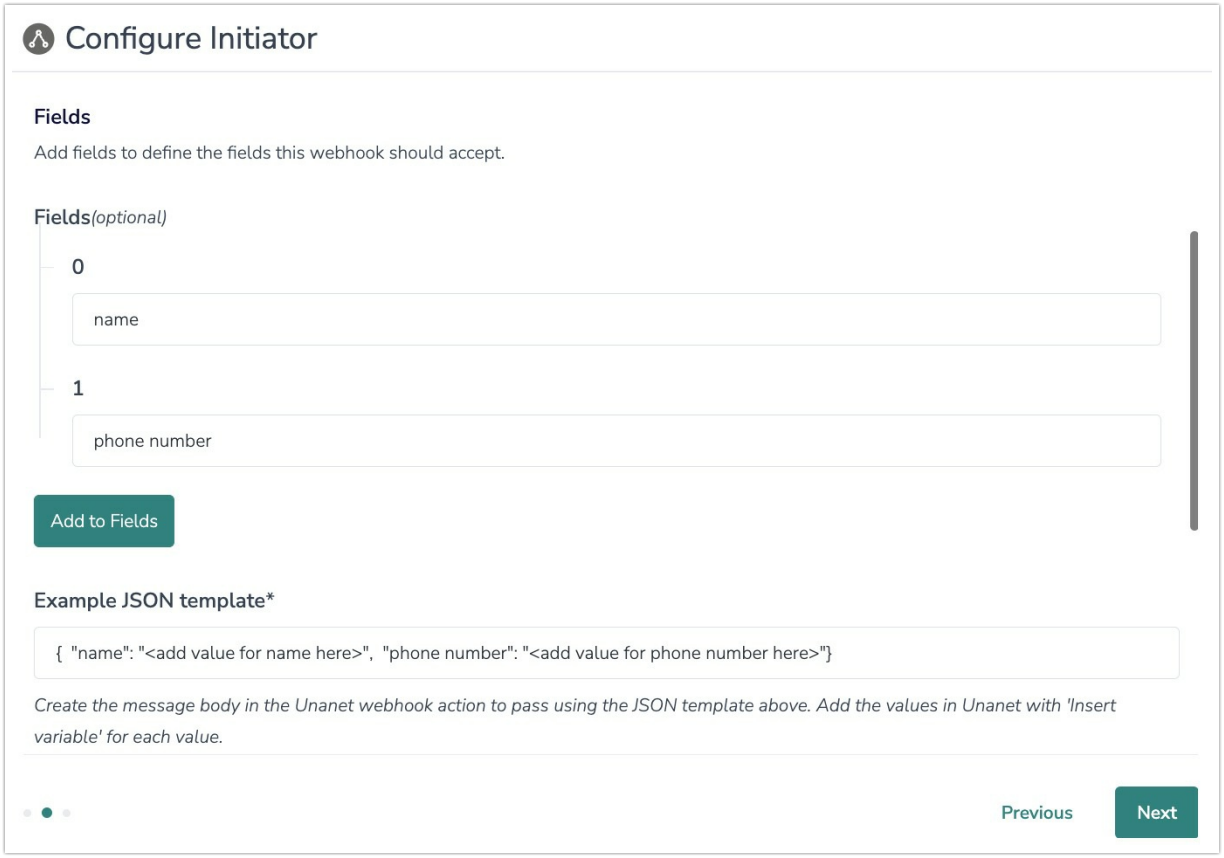


10. Return to Unanet and set the Outbound URL in your workflow to the URL you just copied. Click save.



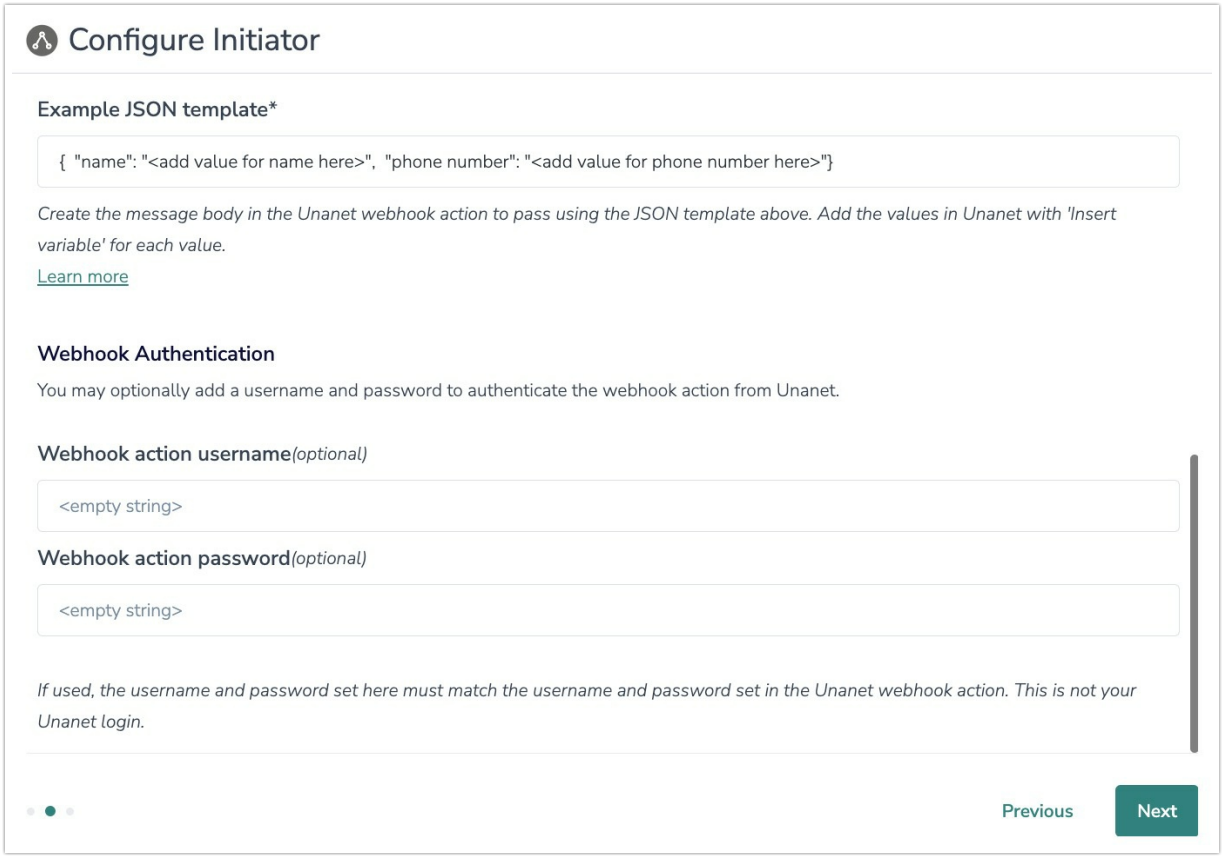
11. Return to Alchemer, add the fields this webhook should accept.

> You will still need to create the message body in the Unanet webhook action to pass using the JSON template above. Add the values in Unanet with 'Insert variable' for each value.



12. *Optional.* You may optionally add a username and password to authenticate the webhook action from Unanet.

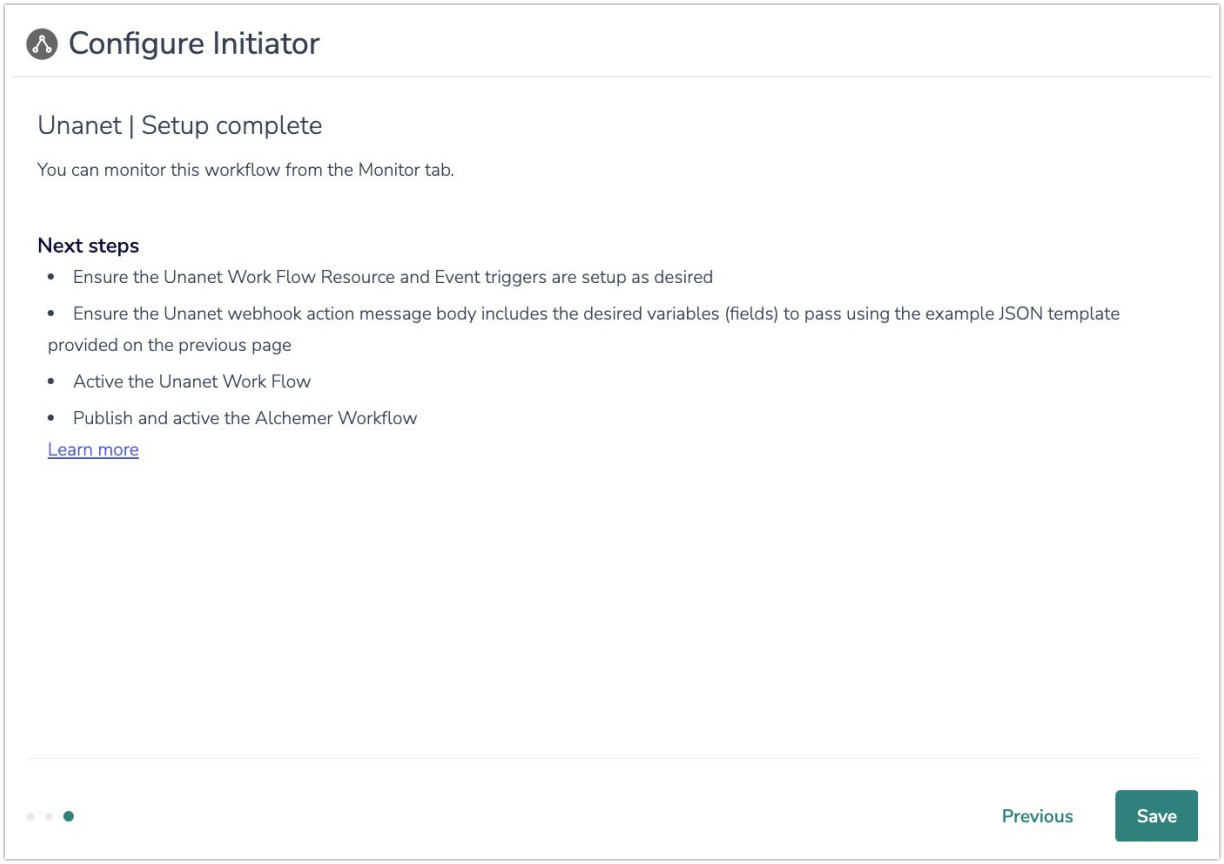
> If used, the username and password set here must match the username and password set in the Unanet webhook action. This is not your Unanet login.



13. Click save to complete initiator setup.

You will still need to complete these next steps:

- Ensure the Unanet workflow Resource and Event triggers are setup as desired
- Ensure the Unanet webhook action message body includes the desired variables (fields) to pass using the example JSON template provided. (See step 11)
- Activate the Unanet workflow
- Publish and activate the Alchemer workflow.

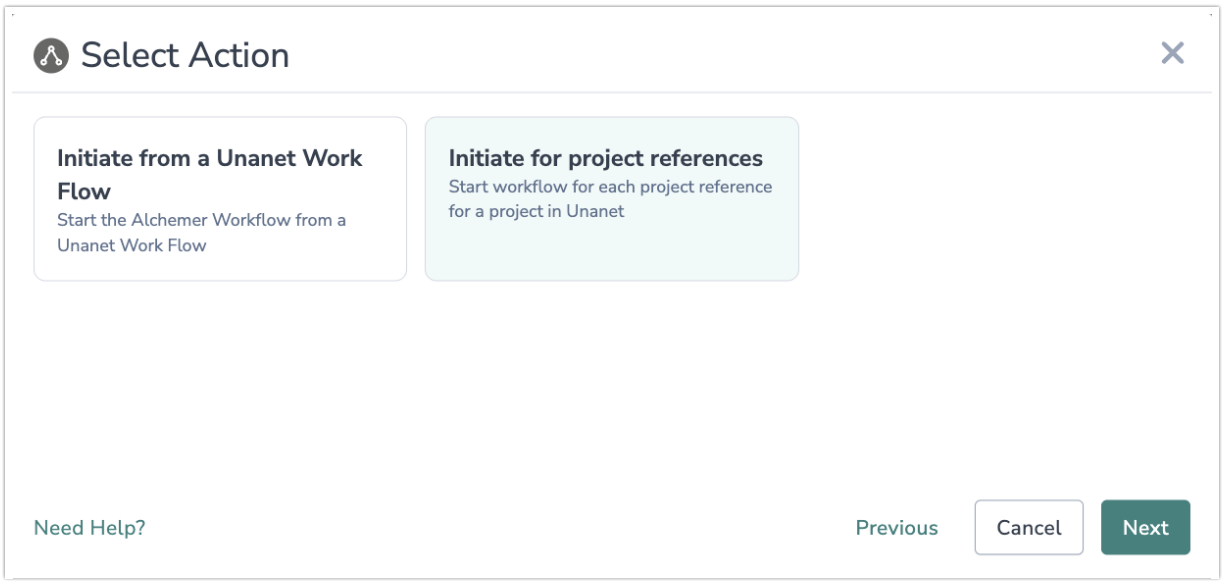


Merge Codes

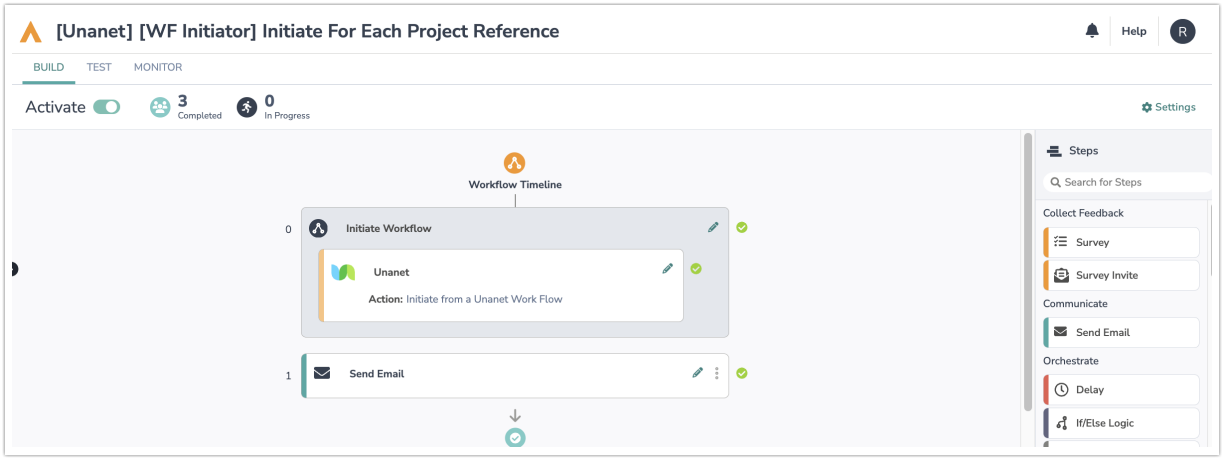
When the webhook fires, Unanet will pass any custom fields you defined to Alchemer Workflow. After configuring this initiator, you can use these fields in merge codes, logic, and other Workflow features.

> For more information on how to use these merge codes in your workflow, check out this article.

Unanet | Initiate for project reference



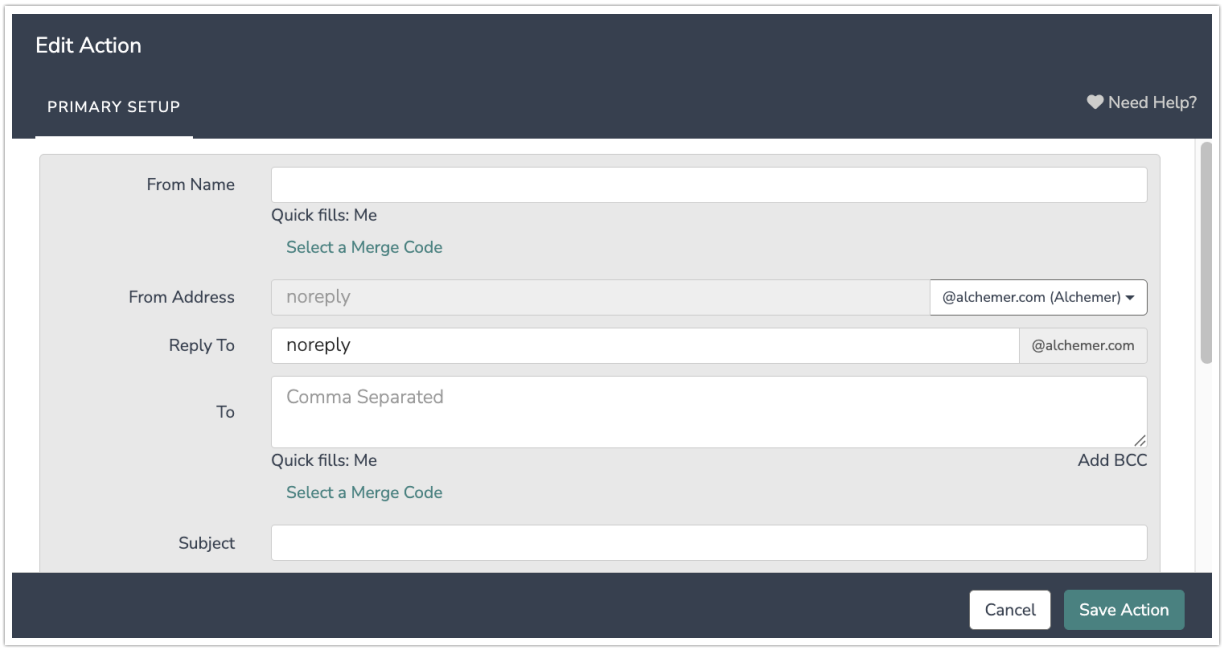
1. Drag and drop send email into the Workflow timeline.



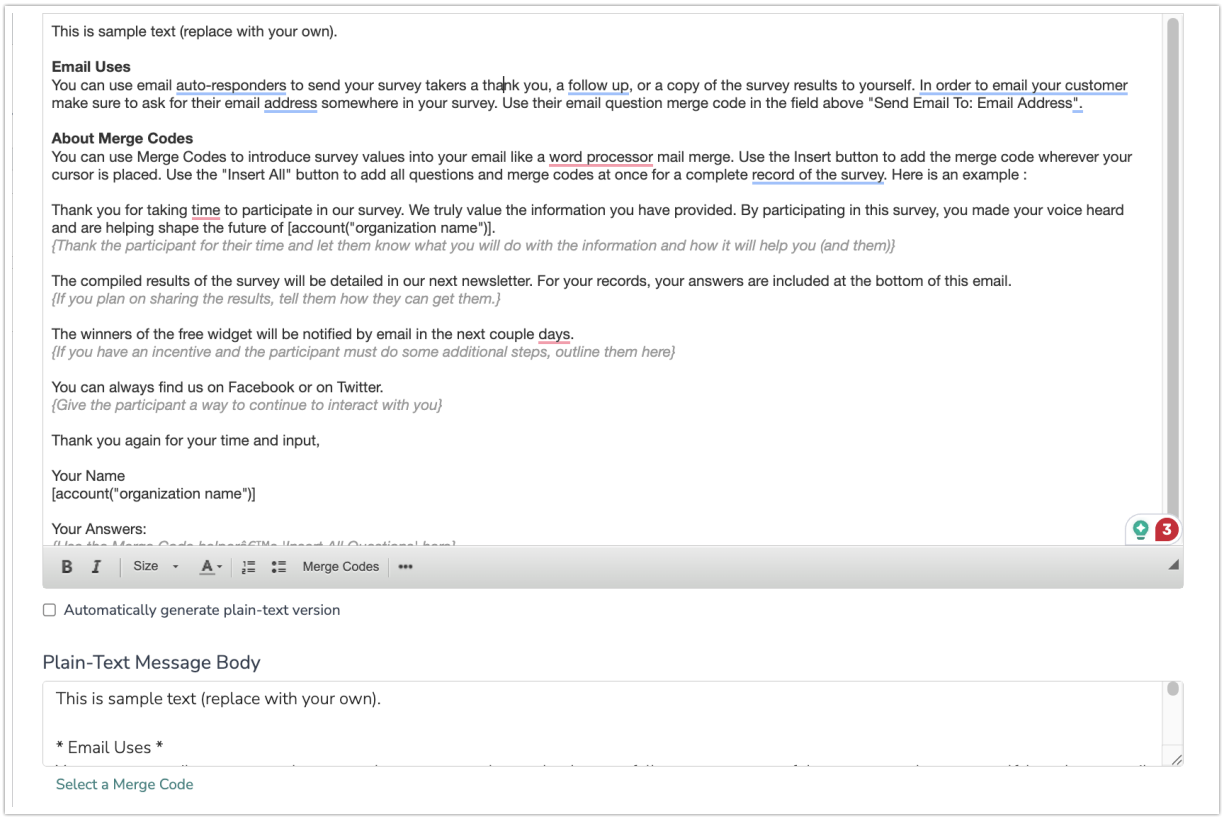
2. Select the pencil icon to edit your initiator.



3. Fill out the fields of your email.



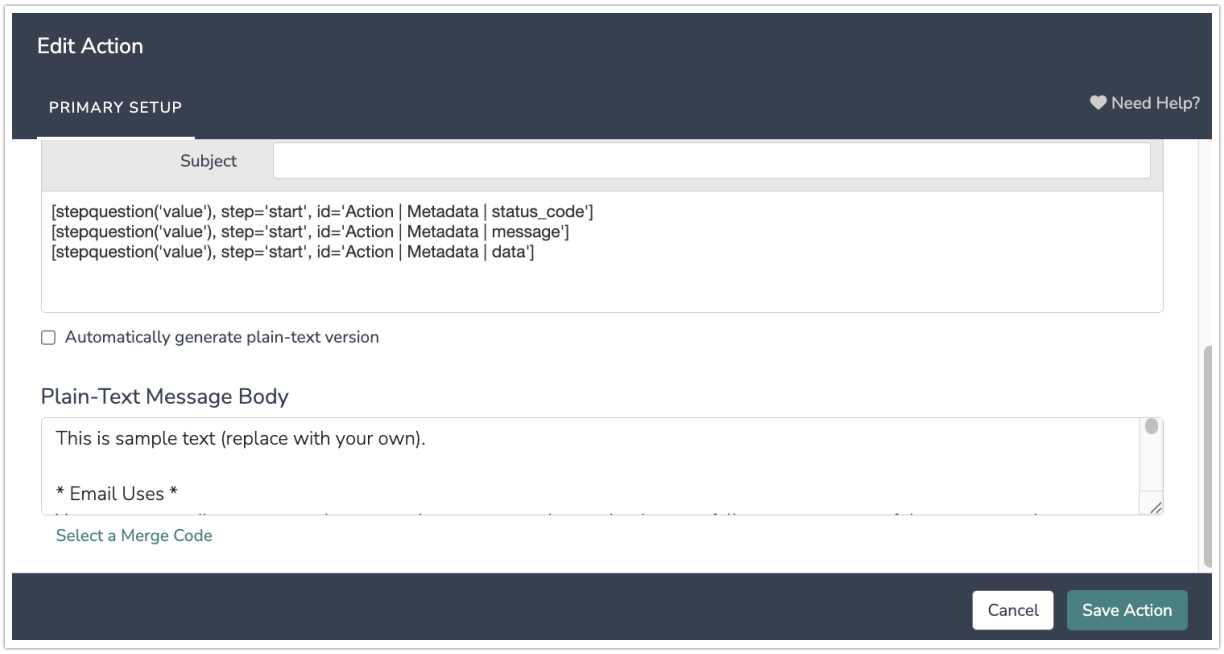
4. Write the body of your email.



Select merge codes and include the following merge codes.

- [stepquestion('value'), step='start', id='Action | Metadata | status_code']
- [stepquestion('value'), step='start', id='Action | Metadata | message']

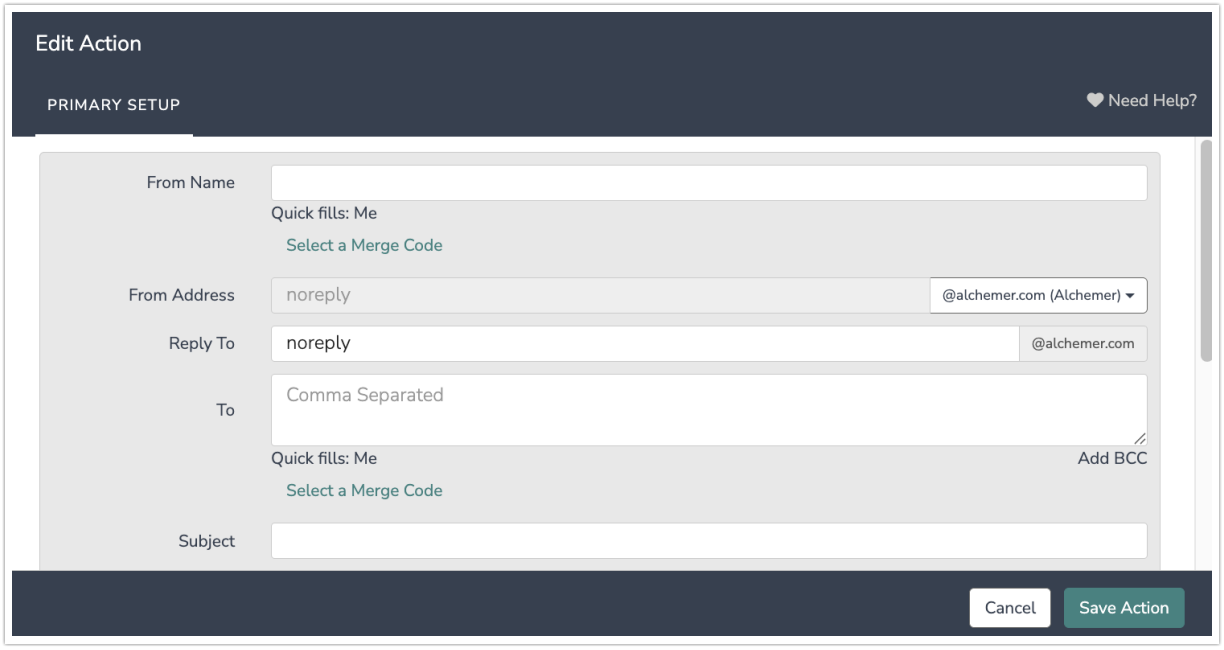
- [stepquestion('value'), step='start', id='Action | Metadata | data']



5. Save the action.

FAQs

- What permissions do I need within Alchemer to set-up and use the Unanet initiator?
- Can multiple Workflows initiate off the same Unanet initiator?
- This initiator doesn't fit my use cases, or I want to provide feedback to the Alchemer Product Team!



Related Articles