

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.

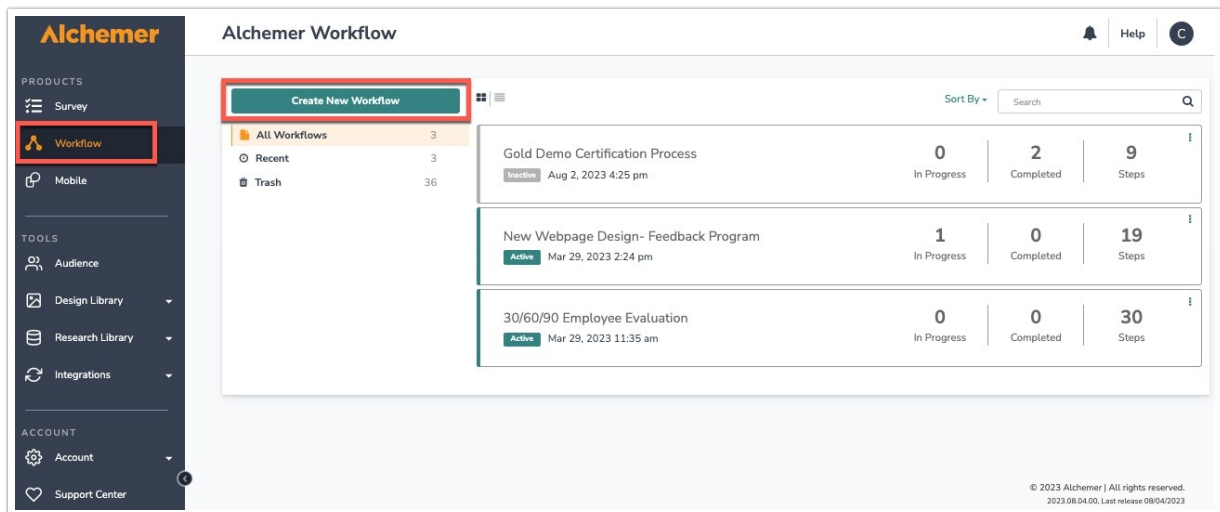
Overview

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.

Create New Workflow

* What would you like to name this Workflow?














Customer Service Feedback Workflow

Cancel

Start Building

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

Select Initiator

 Gladly Start an Alchemer Workflow from an event in Gladly	 Gorgias Gorgias integration with Alchemer	 Integration Factory prototype Prototype
 Microsoft Dynamics 365 Start an Alchemer Workflow from an event in Microsoft Dynamics 365	 Salesforce Start an Alchemer Workflow from an event in Salesforce	 Scheduled Start the Alchemer Workflow on a schedule
 Share Link When a user clicks on a custom workflow link	 Shopify Start an Alchemer Workflow from an event in Shopify	 Survey Listener When a given survey is completed
 Twilio Alchemer integration with Twilio	 Unanet Alchemer integration with Unanet	 Zendesk Start an Alchemer Workflow from an event in Zendesk
 Zoho Alchemer integration with Zoho		

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4. Select "Initiate from a Unanet Work Flow"

Select Action

Initiate from a Unanet Work Flow
Start the Alchemer Workflow from a Unanet Work Flow

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

5. Click next on the initiator overview screen.

Configure Initiator

Unanet | Initiate from Unanet Work Flow

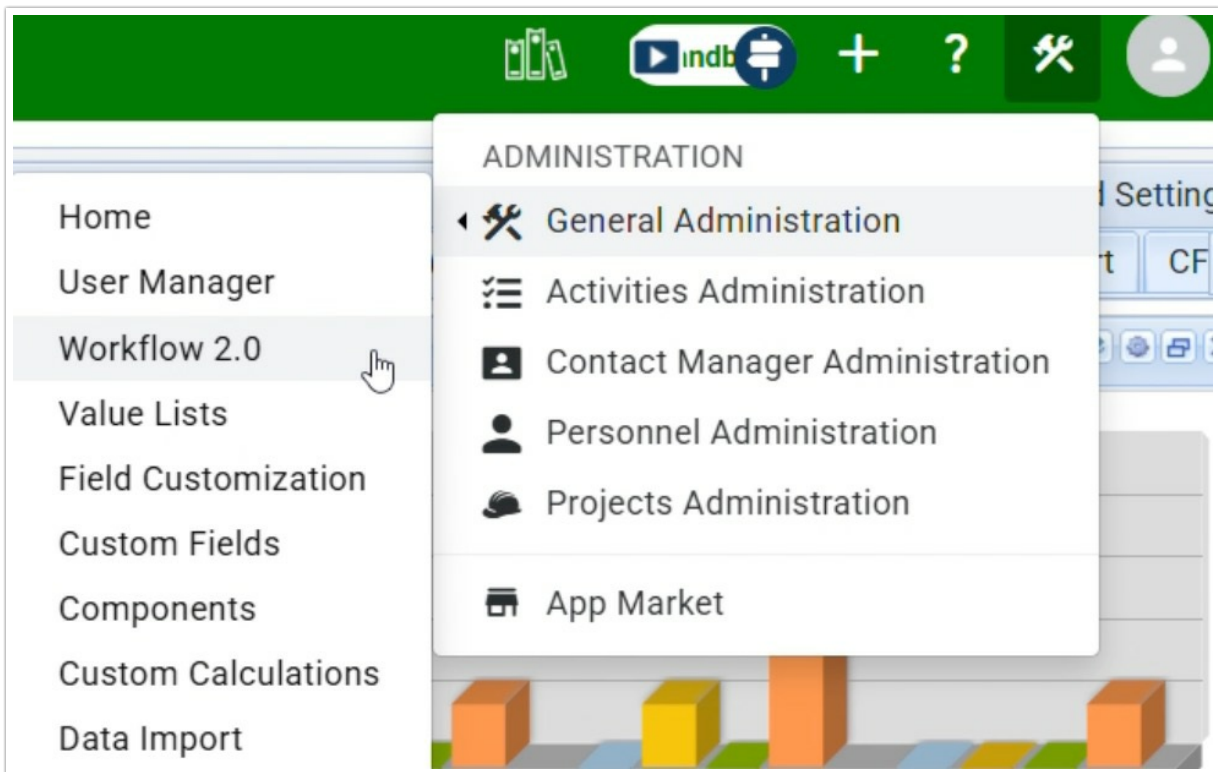
Start the Alchemer Workflow from Uninet Work Flow.

Need help? [Learn more](#)

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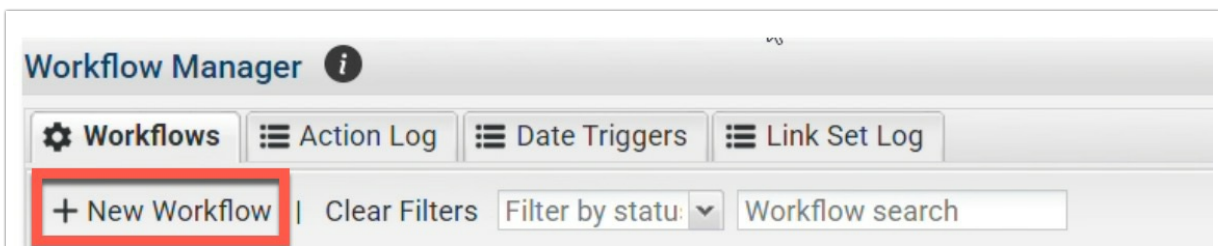
[Previous](#) [Next](#)

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.

New Workflow

Name: Alchemer test

Workflow Group:

Sub Group:

Resource: Project

Event: Update

Workflow Summary | Workflow Description | **Workflow Actions** | Workflow Else Actions | Project Filters (before update)

Workflow Actions occur if event and resource criteria are met

+ Add Action

→ Webhook

Webhook Name: Alchemer test

Outbound URL:

Username:

Password:

B *I* U | A⁺ A⁻ | A⁻ ab² | | | Insert Variable | Insert Temp

9. In Alchemer, copy the webhook URL.

Configure Initiator

Unanet | Webhook URL and Fields

Webhook URL

Webhook URL

`https://[redacted]@trayapp.io`



Set the Unanet Webhook Action Outbound URL in your Work Flow to this URL

Fields

Add fields to define the fields this webhook should accept.

Fields *(optional)*

Warning: This field will send an empty array

Add to Fields

Example JSON template*



Previous

Next

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

New Workflow

Name: Alchemer test

Workflow Group: [Dropdown]

Sub Group: [Dropdown]

Resource: Project

Event: Update

Workflow Summary | Workflow Description | **Workflow Actions** | Workflow Else Actions | Project Filters (before update)

Workflow Actions occur if event and resource criteria are met

+ Add Action

→ Webhook [Close]

Webhook Name: Alchemer test

Outbound URL: https://[Redacted].trayapp.io

Username: [Text]

Password: [Text]

B *I* U **A** **A** **A** **ab** | [List Icons] | Insert Variable | Insert Temp

Save Cancel

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.

Configure Initiator

Fields

Add fields to define the fields this webhook should accept.

Fields(optional)

0

name

1

phone number

Add to Fields

Example JSON template*

```
{ "name": "<add value for name here>", "phone number": "<add value for phone number here>"}
```

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.



Previous

Next

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.

Configure Initiator

Example JSON template*

```
{ "name": "<add value for name here>", "phone number": "<add value for phone number here>"}
```

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.

[Learn more](#)

Webhook Authentication

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

Webhook action username *(optional)*

Webhook action password *(optional)*

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.



Previous

Next

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.

Configure Initiator

Unanet | Setup complete

You can monitor this workflow from the Monitor tab.

Next steps

- Ensure the Unanet Work Flow 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 on the previous page
- Active the Unanet Work Flow
- Publish and active the Alchemer Workflow

[Learn more](#)



[Previous](#)

[Save](#)

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](#).

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
