

# 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.

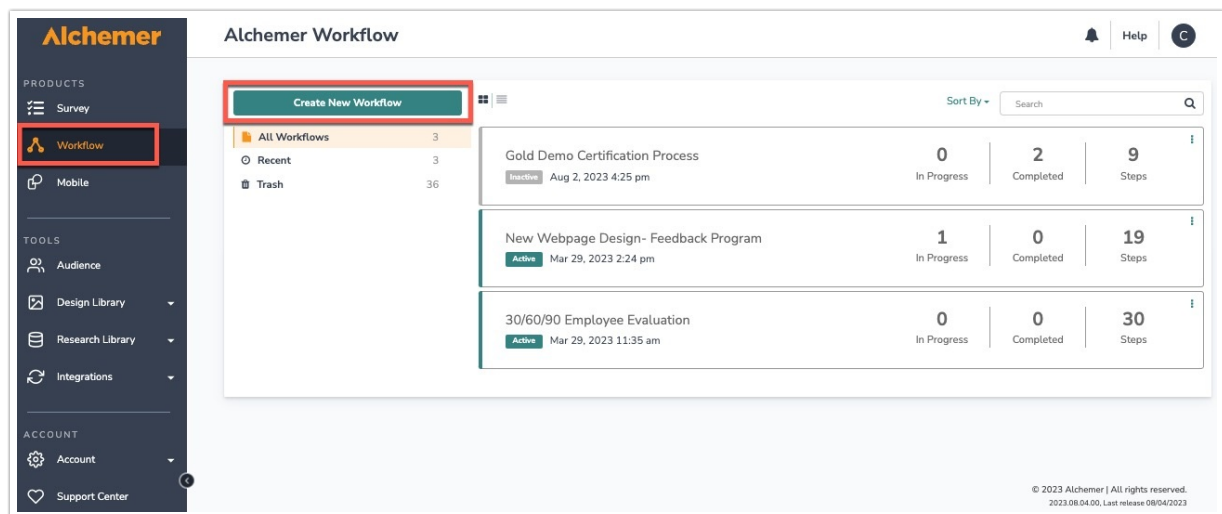
## Overview

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


**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


[Need Help?](#)[Next](#)

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"

 **Select Action**

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

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5. Click next on the initiator overview screen.

 **Configure Initiator**

### Unanet | Initiate from Unanet Work Flow

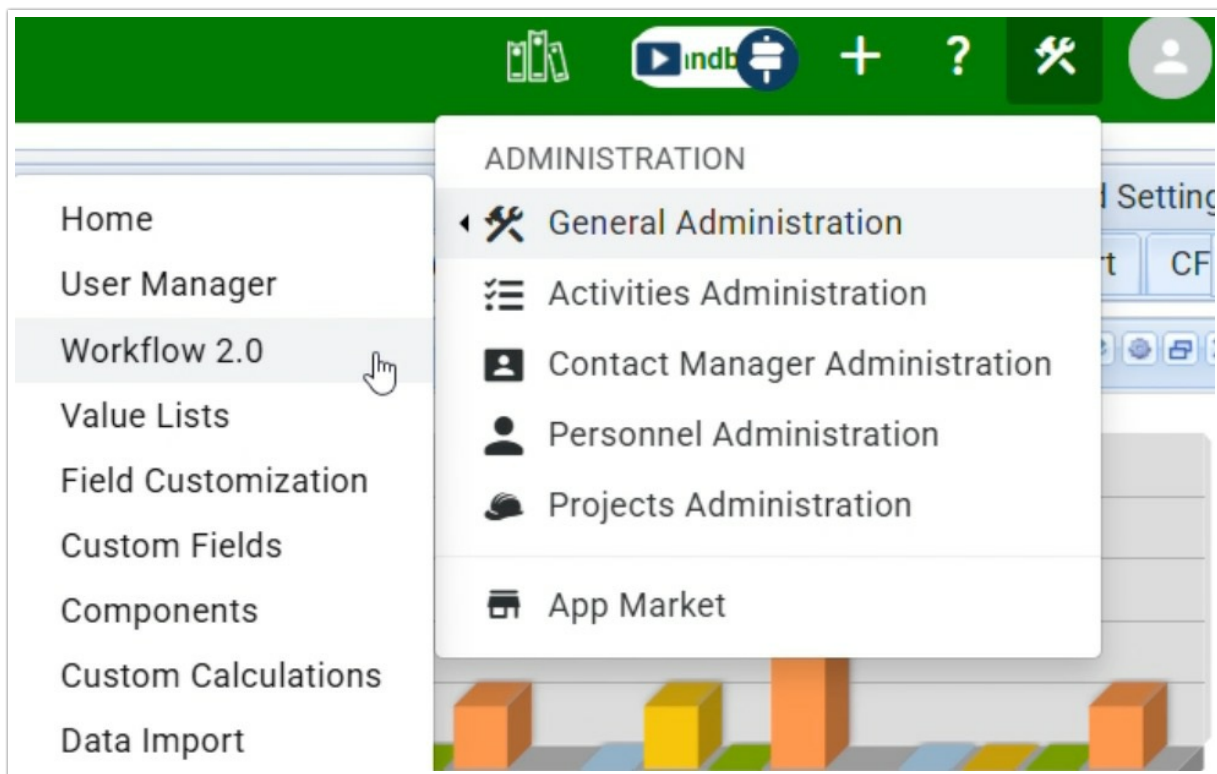
Start the Alchemer Workflow from Uninet Work Flow.

Need help? [Learn more](#)

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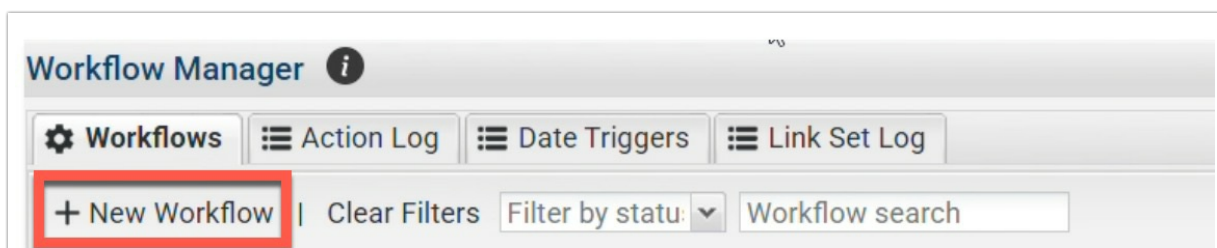
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6. In your Unanet account, create a new workflow or select an existing workflow. To create a workflow in Unanet navigate to Administration > General Administration > Workflow 2.0.



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*


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
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
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


































































Insert Variable | Insert Temp

Save

Cancel

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\*



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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:

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: [https://\[redacted\].trayapp.io](https://[redacted].trayapp.io)

Username:


Password:

**B** *I* U **A** *A* **A** *ab* | | 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.

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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.

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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](#)



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[Save](#)

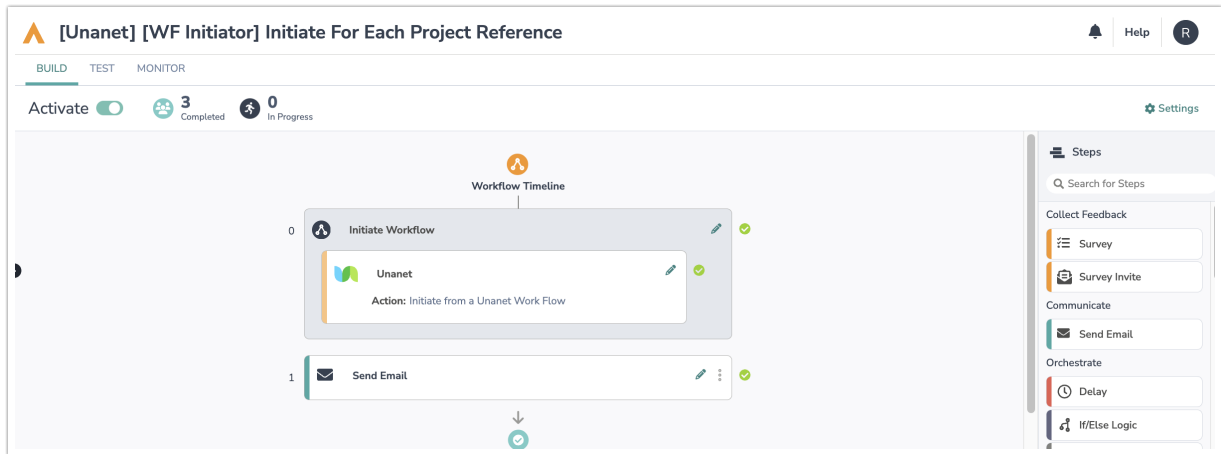
## Merge Codes

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.

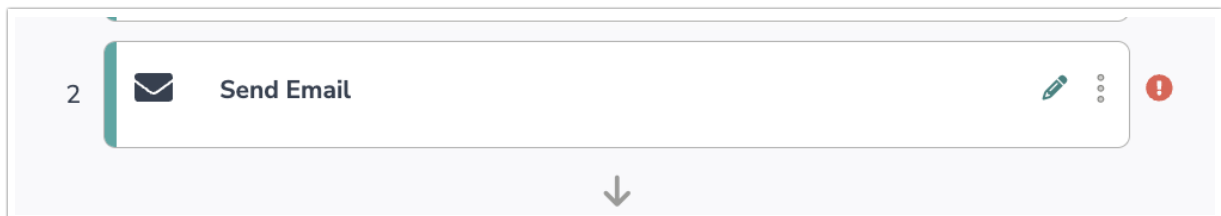
For more information on how to use these merge codes in your workflow, [check out this article](#).

## Unanet | Initiate for each 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.

Edit Action

PRIMARY SETUP

From Name

Quick fills: Me

Select a Merge Code

From Address

noreply

@alchemer.com (Alchemer)

Reply To

noreply

@alchemer.com

To

Comma Separated

Quick fills: Me

Select a Merge Code

Add BCC

Subject

Cancel

Save Action

4. Write the body of your email.

This is sample text (replace with your own).

**Email Uses**  
 You can use email auto-responders to send your survey takers a thank you, a follow up, or a copy of the survey results to yourself. In order to email your customer make sure to ask for their email address somewhere in your survey. Use their email question merge code in the field above "Send Email To: Email Address".

**About Merge Codes**  
 You can use Merge Codes to introduce survey values into your email like a word processor mail merge. Use the Insert button to add the merge code wherever your cursor is placed. Use the "Insert All" button to add all questions and merge codes at once for a complete record of the survey. Here is an example :

Thank you for taking time to participate in our survey. We truly value the information you have provided. By participating in this survey, you made your voice heard and are helping shape the future of [account("organization name")].  
*{Thank the participant for their time and let them know what you will do with the information and how it will help you (and them)}*

The compiled results of the survey will be detailed in our next newsletter. For your records, your answers are included at the bottom of this email.  
*{If you plan on sharing the results, tell them how they can get them.}*

The winners of the free widget will be notified by email in the next couple days.  
*{If you have an incentive and the participant must do some additional steps, outline them here}*

You can always find us on Facebook or on Twitter.  
*{Give the participant a way to continue to interact with you}*

Thank you again for your time and input,

Your Name  
 [account("organization name")]

Your Answers:  
*{Use the Merge Codes below to Insert All Questions Here}*

**B I** | Size | A | | Merge Codes | ...

☐ Automatically generate plain-text version

**Plain-Text Message Body**

This is sample text (replace with your own).

\* Email Uses \*

Select a Merge Code

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']

**Edit Action**

PRIMARY SETUP ♥ Need Help?

Subject

[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']

☐ Automatically generate plain-text version

**Plain-Text Message Body**

This is sample text (replace with your own).

\* Email Uses \*

Select a Merge Code

Cancel Save Action

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!

Edit Action

PRIMARY SETUP

Need Help?

From Name

Quick fills: Me

Select a Merge Code

From Address

noreply

@alchemer.com (Alchemer)

Reply To

noreply

@alchemer.com

To

Comma Separated

Quick fills: Me

Select a Merge Code

Add BCC

Subject

Cancel

Save Action

### Related Articles