

Unanet Integration for Alchemer Workflow

The Alchemer Workflow Unanet Integration is available for purchase as an add-on. If you are interested in purchasing, [please contact us for more information](#).

Overview

With the Unanet Integration for Alchemer Workflow you can:

- Get record: Pull in information from a Unanet record into your Workflow.
- Get opportunity contact: Get a contact associated with an opportunity in Unanet Compass
- Get project owner client contact: Get a project owner client contact associated with a project from Unanet Compass.

The integration enables you to personalize workflow steps in Alchemer using information from Unanet.

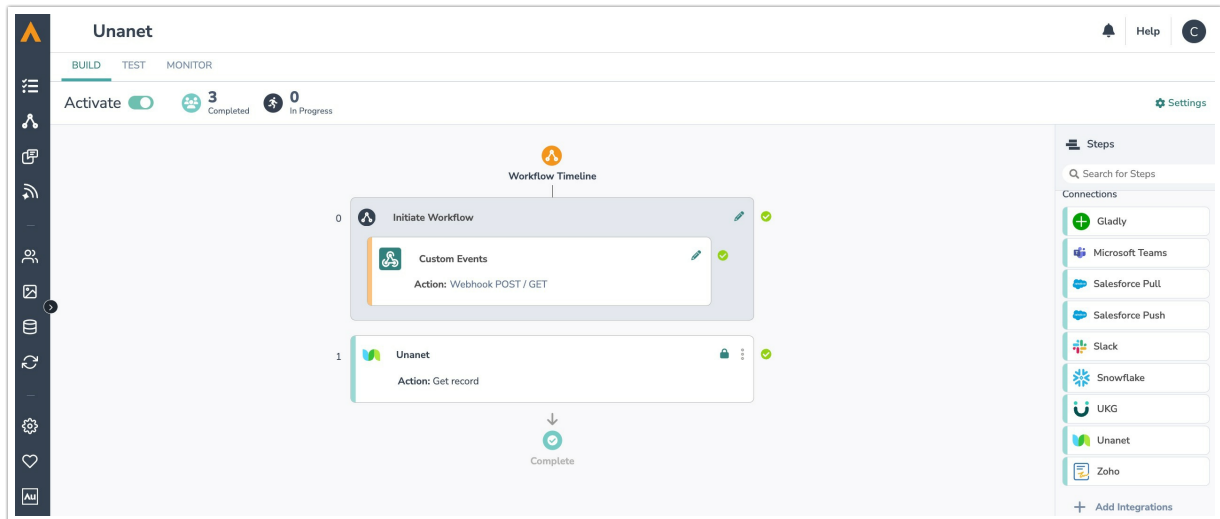
Adding a Unanet Step to your Workflow

1. Create a Workflow in Alchemer and select your initiator.

For more information on building Workflows in Alchemer refer to the following documentation:

- [Getting Started with Alchemer Workflow](#)
- [Building a Workflow](#)

2. When you are ready to add the Unanet step to your Workflow, drag the Unanet step from the Step Library under Connections.



3. Click the pencil icon to configure your Unanet integration step.



4. Select Unanet as your integration and then select the action you would like to perform:

- Get record: Get record from Unanet Compass. [Jump to section.](#)
- Get opportunity contact: Get a contact associated with an opportunity in Unanet Compass. [Jump to section.](#)
- Get project owner client contact: Get a project owner client contact associated with a project from Unanet Compass. [Jump to section.](#)

Unanet | Get Opportunity Contact

Your browser does not support HTML5 video.

1. Select "Get opportunity contact" for your action.

Configure Integration

PRIMARY SETUP

[← Back](#)

Select Action

Select the action you would like to perform.

Get record
Get a record from Unanet Compass

Get opportunity contact
Get a contact associated with an opportunity from Unanet Compass

[Cancel](#) [Next](#)

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

Before configuring this integration action, you will need:

- Your Unanet Compass API information and login
- Fields in this survey that contain information to use to find the record to get (id, email, etc.)

Configure Integration

PRIMARY SETUP

Unanet | Get opportunity contact

Get a contact associated with an opportunity from Unanet Compass.

You will need:

- Your Unanet Compass API information and login
- Fields in this workflow that contain information to use to find the opportunity record to get (id, opportunity number.)

Need help? [Learn more](#)

v250306

Previous

Next

3. Click "Add a new account". Then name your authentication and provide your:

- Unanet Compass API key
- System username
- System password
- Firm ID

Click "Create" when done.

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Unanet | Authentication

Authenticate with Unanet

Unanet connected PRODUCTIONUS

Select Unanet environment

Production

Create a new authentication

PRODUCTIONUS:C731671:T1057705's Unanet account 1

Compass API Key

No value

System Username

No value

System Password

No value

Firm ID

No value

Previous

Create

4. Select your Unanet environment.

Configure Action

PRIMARY SETUPLOGICADVANCED

Unanet | Authentication

Authenticate with Unanet

Unanet connected

PRODUCTIONUS:C731671:T1057705's Unanet account

▼

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Select Unanet environment*

Production

▼

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Previous

Next

5. Enter the Opportunity Number of an opportunity that has at least one opportunity contact. This is only used here in this setup to get the opportunity contact field names.

Configure Integration

PRIMARY SETUP

Unanet | Sample opportunity

We will get a sample opportunity contact so we know what fields to make available, including custom fields.

Enter the Opportunity Number of an opportunity that has at least one opportunity contact. This is only used here in this setup to get the opportunity contact field names.

Sample Opportunity Number*

24-0219

6. Select the fields that contain the values you want to use to find the specific opportunity in Unanet.

Configure Integration

PRIMARY SETUP

Unanet | Find opportunity contact record

Select the fields that contain the values you want to use to find the specific opportunity Unanet. You may also filter the opportunity contact records.

Find the opportunity
Use this Alchemer field

to match this opportunity field

Step 0 | Webhook | input1

Unanet | OpportunityNumber

Add a new mapping

Filter the opportunity contacts
Use this Alchemer field

to match this opportunity contact field

Choose an option

Choose an option

Add a new mapping

Multiple fields will be searched with AND logic.

Previous

Next

7. Click "Save" to complete integration setup.

Configure Integration

PRIMARY SETUP

Unanet | Setup complete

A log of each run result can be found in the Monitor tab. Metadata about this action are also available as merge codes.

A status code is available in the action metadata:

- 200: A single record was successfully found
- 201: More than one record was found. The first record is used for the values returned to Alchemer.
- 202: Query ran successfully, but no records were found
- 400: The external integration returned an error.

Previous

Save

Now what / Where is my data?

All of the information from this integration is now available in this workflow and all surveys in this workflow. You can use them to:

- Add Merge Codes to Email or Survey Invite steps.
- Use with Logic in the workflow.
- Use to personalize the survey in the workflow.

Unanet | Get Record

1. Select "Get Record" for your action.

The screenshot shows a 'Configure Integration' window with a dark header. Below the header, there's a 'PRIMARY SETUP' tab. A 'Back' button is visible. The main area is titled 'Select Action' with the instruction 'Select the action you would like to perform.' There are two action cards: 'Get record' (Get a record from Unanet Compass) and 'Get opportunity contact' (Get a contact associated with an opportunity from Unanet Compass). At the bottom right, there are 'Cancel' and 'Next' buttons.

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

Before configuring this integration action, you will need:

- Your Unanet Compass API information and login
- Fields in this survey that contain information to use to find the record to get (id, email, etc.)
- Fields in this survey where you can save the record information

Configure Action

PRIMARY SETUPLOGICADVANCED

Unanet | Get record

Gets a record from Unanet Compass

You will need:

- Your Unanet Compass API information and login
- Fields in this survey that contain information to use to find the record to get (id, email, etc.)
- Fields in this survey where you can save the record information

Need help? [Learn more](#)

v250224

PreviousNext

3. Click "Add a new account". Then name your authentication and provide your:

- Unanet Compass API key
- System username
- System password
- Firm ID

Click "Create" when done.

Configure Action

PRIMARY SETUPLOGICADVANCED

Unanet | Authentication

Authenticate with Unanet

Unanet connected PRODUCTIONUS

Select Unanet environment

Production

Create a new authentication

PRODUCTIONUS:C731671:T1057705's Unanet account 1

Compass API Key

No value

System Username

No value

System Password

No value

Firm ID

No value

Previous

Create

4. Select your Unanet environment.

Configure Action

PRIMARY SETUPLOGICADVANCED

Unanet | Authentication

Authenticate with Unanet

Unanet connected
PRODUCTIONUS:C731671:T1057705's Unanet account

...

Select Unanet environment*

Production

PreviousNext

5. Select a record type or enter the API name of the type of record you want to get.

Configure Action

PRIMARY SETUPLOGICADVANCED

Unanet | Select record type

Select a record type or enter the API name of the type of record you want to get.

Select a standard record type(optional)

Contact

OR

Enter a custom record type(optional)

<empty string>

Enter the API name of the record type

PreviousNext

6. Select the field in the Workflow that you want to use to find the specific record in Unanet.

Now what / Where is my data?

All of the information from this integration is now available in this workflow and all surveys in this workflow. You can use them to:

- Add Merge Codes to Email or Survey Invite steps.
- Use with Logic in the workflow.
- Use to personalize the survey in the workflow.

Unanet | Get Project Owner Client Contact

1. Select "Get Project Owner Client Contact" for your action.

Configure Integration

PRIMARY SETUP

< Back

Select Action

Select the action you would like to perform.

Get record
Get a record from Unanet Compass

Get opportunity contact
Get a contact associated with an opportunity from Unanet Compass

Get project owner client contact
Get a project owner client contact associated with a project from Unanet Compass.

Cancel Next

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

Before configuring this integration action, you will need:

- Your Unanet Compass API information and login
- Fields in this survey that contain information to use to find the record to get (id, email, etc.)

Configure Integration

PRIMARY SETUP

Unanet | Get project owner client contact

Get a project owner client contact associated with a project from Unanet Compass.

You will need:

- Your Unanet Compass API information and login
- Fields in this workflow that contain information to use to find the project to get (id, project number, etc.)

Need help? [Learn more](#)

v250407

PreviousNext

3. Click "Add a new account". Then name your authentication and provide your:

- Unanet Compass API key
- System username
- System password
- Firm ID

Click "Create" when done.

Configure Action

PRIMARY SETUPLOGICADVANCED

Unanet | Authentication

Authenticate with Unanet

Unanet connected

PRODUCTIONUS

Select Unanet environ
Production

Create a new authentication

PRODUCTIONUS:C731671:T1057705's Unanet account 1

Compass API Key

No value

System Username

No value

System Password

No value

Firm ID

No value

Previous

Create

4. Select your Unanet environment.

Configure Action

PRIMARY SETUPLOGICADVANCED

Unanet | Authentication

Authenticate with Unanet

Unanet connected
PRODUCTIONUS:C731671:T1057705's Unanet account

Select Unanet environment*

Production

PreviousNext

5. Enter the Project Number of an project that has at least one project contact. This is only used here in this setup to get the project contact field names.

Configure Integration

PRIMARY SETUP

Unanet | Sample project

We will get a sample project contact so we know what fields to make available, including custom fields.

Enter the Project Number of an project that has at least one project contact. This is only used here in this setup to get the project contact field names.

Sample Project Number*

123456

6. Select the fields that contain the values you want to use to find the specific project in Unanet.

You may also filter the project owner client contact records.

PRIMARY SETUP

Select the fields that contain the values you want to use to find the specific project Unanet. You may also filter the project owner client contact records.

Add a new mapping

to match this opportunity contact field

Multiple fields will be searched with AND logic.

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[Previous](#)

Next

7. Click "Save" to complete integration setup.

PRIMARY SETUP

A log of each run result can be found in the Monitor tab. Metadata about this action are also available as merge codes.

A status code is available in the action metadata:

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202: Query ran successfully, but no records were found

400: The external integration returned an error.

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[Previous](#)

Save

Now what / Where is my data?

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- Add Merge Codes to Email or Survey Invite steps.
- Use with Logic in the workflow.
- Use to personalize the survey in the workflow.

FAQs

▸ What permissions do I need within Alchemer to set-up and use the Unanet integration?

▸ This integration doesn't fit my use cases, or I want to provide feedback to the Alchemer Product Team!

Related Articles