

Unanet Intregation for Alchemer Workflow

The Alchemer Workflow Unanet Integration is available as part of our Connect pillar. If you are interested in this integration, [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.
- **Get construction schedule:** Pull the construction schedule for a project in Unanet.

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

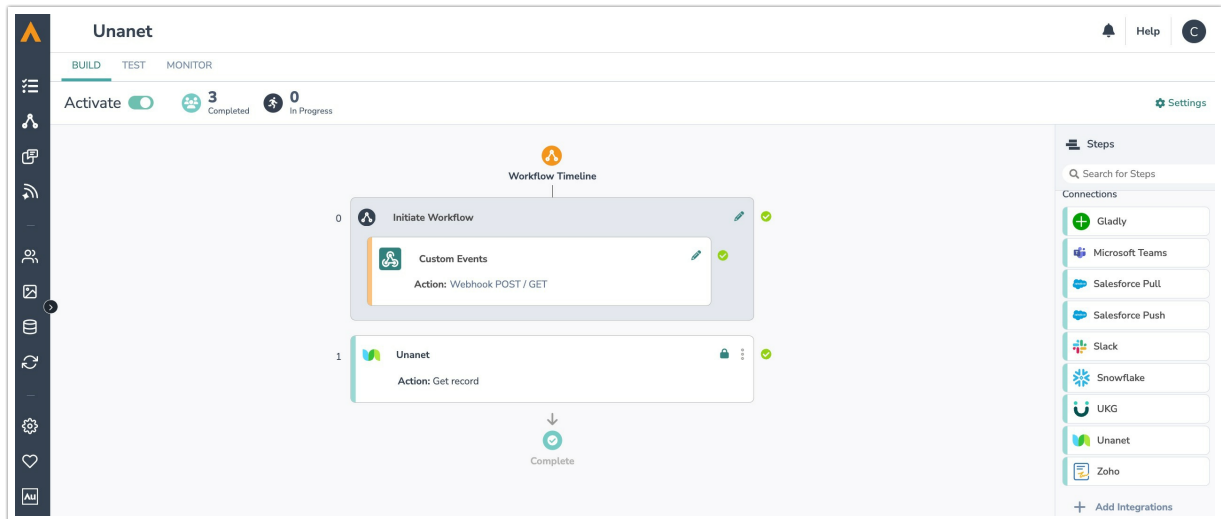
Adding a Unanet Step to your Workflow

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:

- Unanet | Get record: [Jump to section](#).
- Unanet | Get opportunity contact: [Jump to section](#).
- Unanet | Get project owner client contact: [Jump to section](#).
- Unanet | Get construction Schedule: [Jump to section](#)

Unanet | Get Opportunity Contact

Get a contact associated with an opportunity in Unanet Compass.

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

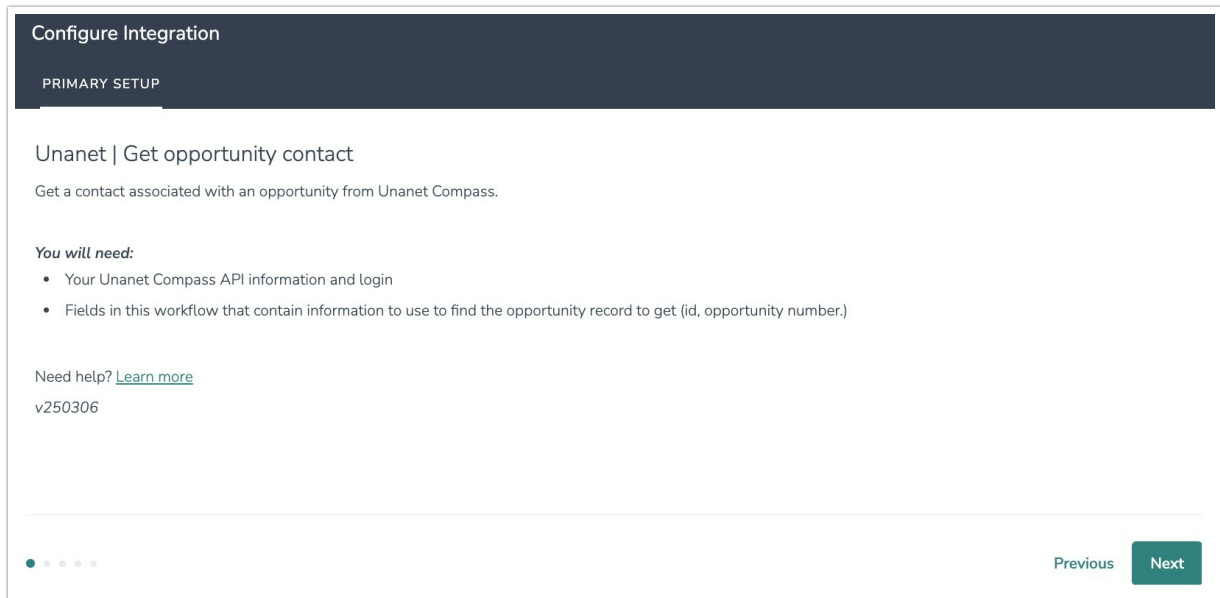
Get opportunity contact
Get a contact associated with an opportunity from Unanet Compass

Cancel Next

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

Before configuring this integration action, you will need:

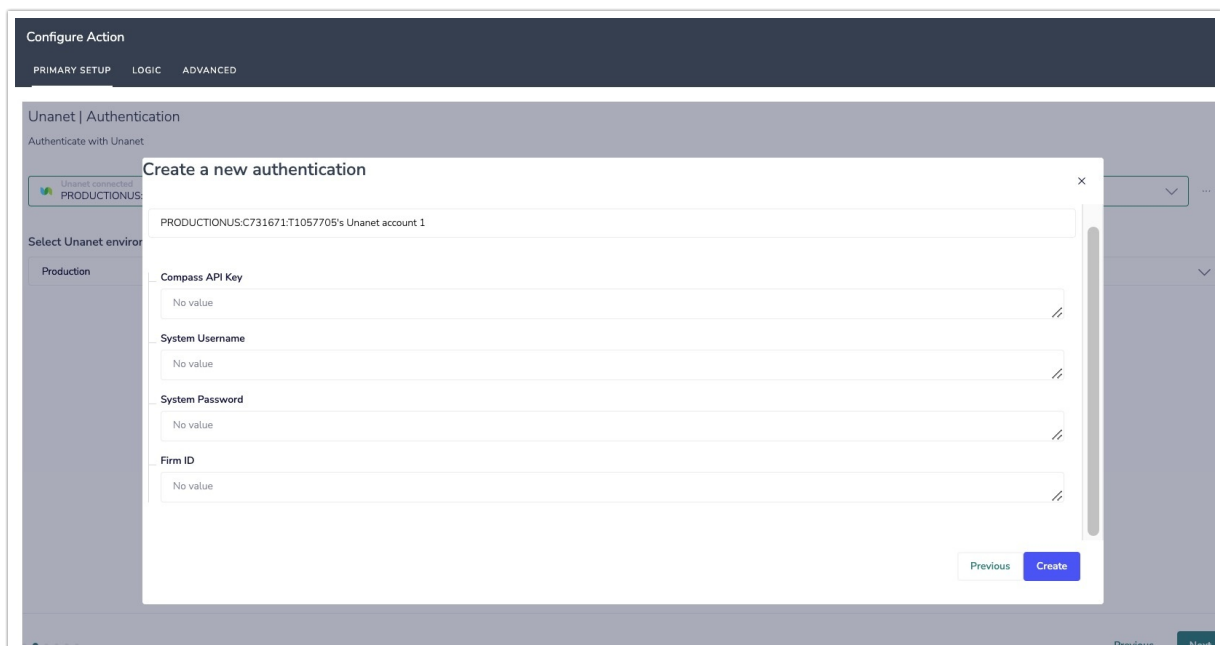
- Your Unanet Compass API information and login
- Fields in this survey that contain information to use to find the record to get (id, email, etc.)



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.



4. Select your Unanet environment.

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Unanet | Authentication

Authenticate with Unanet

Unanet connected
PRODUCTIONUS:C731671:T1057705's Unanet account

Select Unanet environment*

Production

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

Get record from Unanet Compass.

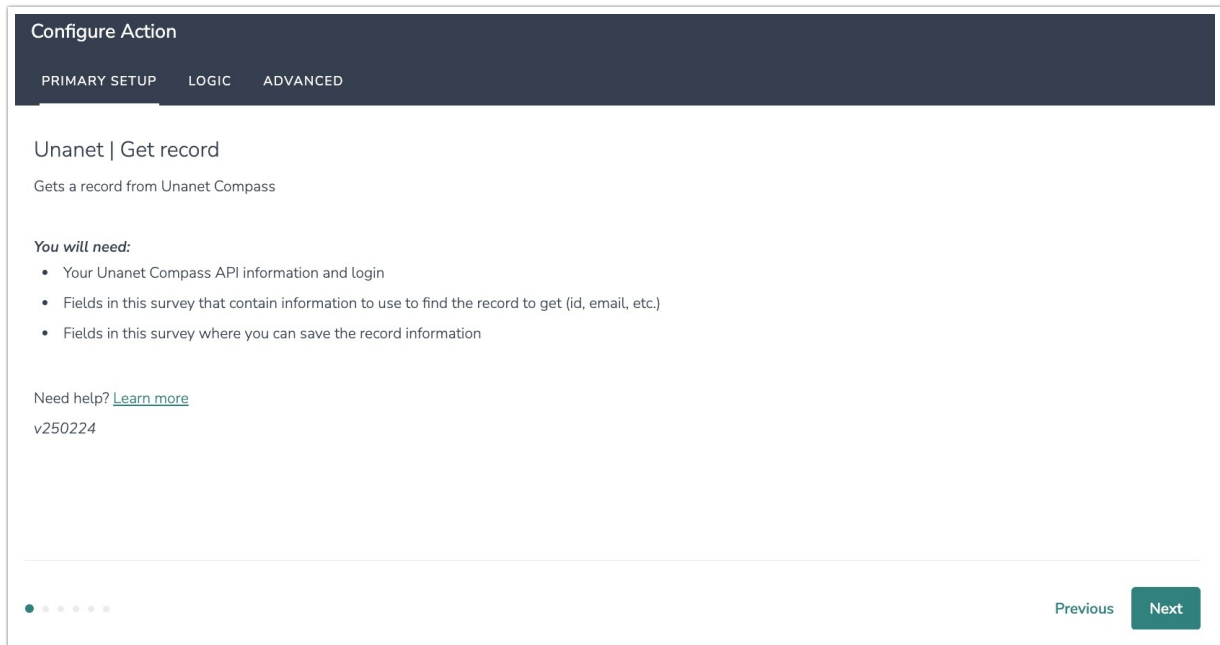
1. Select "Get Record" for your action.

The screenshot shows a 'Configure Integration' interface. At the top, it says 'Configure Integration' and 'PRIMARY SETUP'. Below that is a '< Back' link. The main section is titled 'Select Action' with the instruction 'Select the action you would like to perform.' There are two selectable options: '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, with 'Next' being highlighted in green.

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

Before configuring this integration action, you will need:

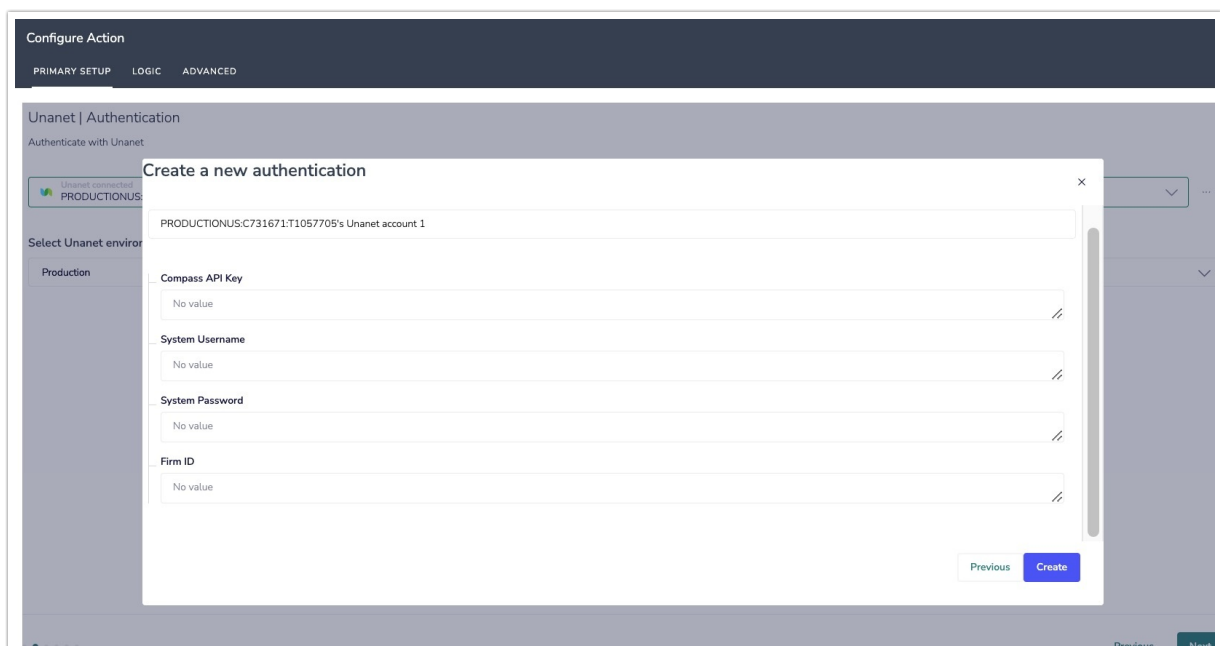
- Your Unanet Compass API information and login
- Fields in this survey that contain information to use to find the record to get (id, email, etc.)
- Fields in this survey where you can save the record information



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.



4. Select your Unanet environment.

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Unanet | Authentication

Authenticate with Unanet

Unanet connected
PRODUCTIONUS:C731671:T1057705's Unanet account

Select Unanet environment*

Production

Previous Next

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

Configure Action

PRIMARY SETUP LOGIC ADVANCED

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

Previous Next

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

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Unanet | Find record

Select the fields in this survey that contain the values you want to use to find the specific record in Unanet.

At least one field is required. Multiple fields will be searched with AND logic.

Use this Alchemer field value to match this Unanet field

Question | 1. Sample question 1 (id: 5) ▼

Unanet | FirstName ▼ 🗑️

Add a new mapping

Progress: 1 of 3 steps (1st step active)

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.

Progress: 1 of 3 steps (1st step active)

Previous Save

Now what / Where is my data?

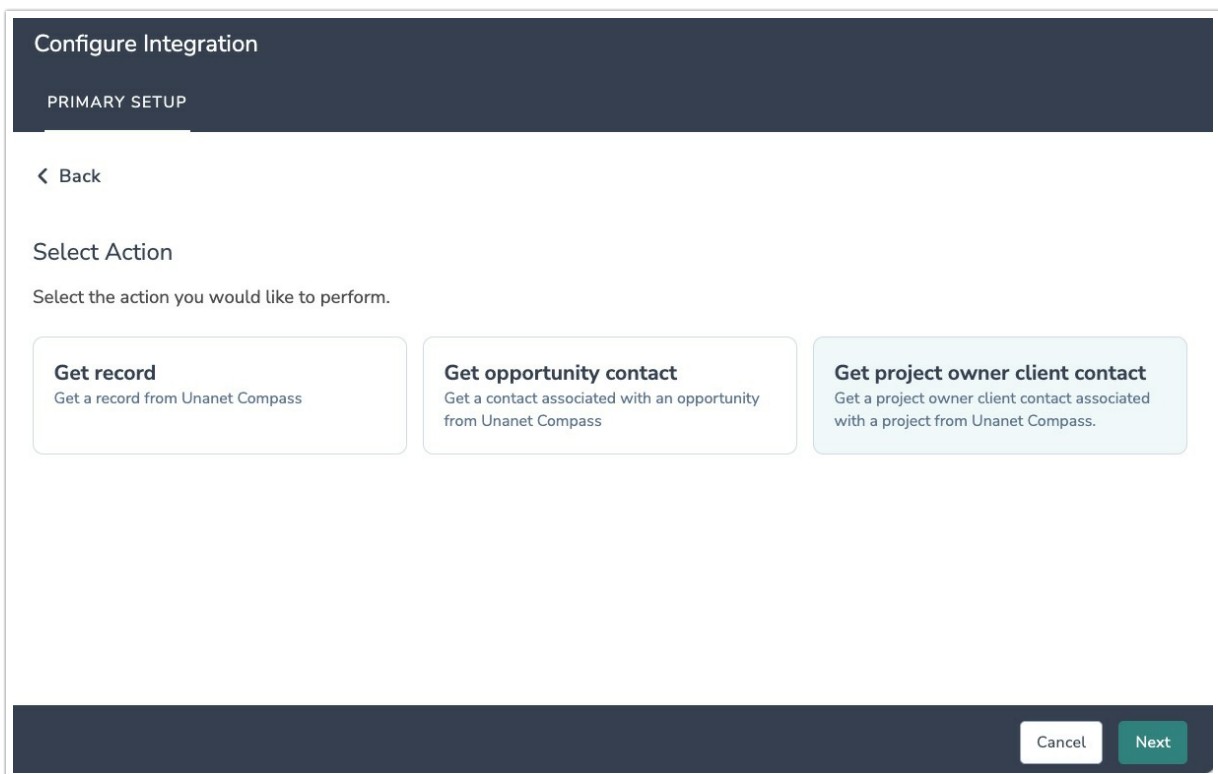
All of the information from this integration is now available in this workflow and all surveys in this workflow. You can use them to:

- 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 Project Owner Client Contact

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

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



The screenshot shows a 'Configure Integration' screen with a dark header. Below the header, it says 'PRIMARY SETUP'. There is a '< Back' link. The main section is titled 'Select Action' and contains the instruction 'Select the action you would like to perform.' There are three action cards: 'Get record' (Get a record from Unanet Compass), 'Get opportunity contact' (Get a contact associated with an opportunity from Unanet Compass), and 'Get project owner client contact' (Get a project owner client contact associated with a project from Unanet Compass). The 'Get project owner client contact' card is highlighted in light blue. 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.)

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](#)

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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 environ

Production

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.

The screenshot shows a 'Configure Action' window with a dark header containing 'Configure Action' and three tabs: 'PRIMARY SETUP', 'LOGIC', and 'ADVANCED'. The 'PRIMARY SETUP' tab is active. Below the header, the title is 'Unanet | Authentication' with the subtitle 'Authenticate with Unanet'. A dropdown menu shows 'Unanet connected' and 'PRODUCTIONUS:C731671:T1057705's Unanet account'. Below this is a 'Select Unanet environment*' dropdown menu with 'Production' selected. At the bottom right, there are 'Previous' and 'Next' buttons, with 'Next' being highlighted in green. A progress indicator with five dots is visible at the bottom left.

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

The screenshot shows a 'Configure Integration' window with a dark header containing 'Configure Integration' and one tab: 'PRIMARY SETUP'. The 'PRIMARY SETUP' tab is active. Below the header, the title is 'Unanet | Sample project' with the subtitle 'We will get a sample project contact so we know what fields to make available, including custom fields.' Below this is a text input field with the placeholder text 'Enter the Project Number of a project that has at least one project contact. This is only used here in this setup to get the project contact field names.' Below the text input field is a 'Sample Project Number*' label and a text input field containing the value '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.

Configure Integration

PRIMARY SETUP

Unanet | Find project owner client contact record

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.

Find the project

Use this Alchemer field to match this project owner client contact field

▼ ▼ 🗑️

[Add a new mapping](#)

Filter the project owner client contacts

Use this Alchemer field to match this opportunity contact field

[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 Construction Schedule

Get a construction schedule associated with a project from Unanet Compass.

You will need:

- Your Unanet Compass API information and login
- Fields in this survey that contain information used to find the schedule
- Fields in the survey where you can save the schedule information

Edit Integration

PRIMARY SETUP

Unanet | Get construction schedule

Gets a construction schedule 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 schedule.
- Fields in this survey where you can save the schedule information

Need help? [Learn more](#)

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● ○ ○ ○ ○ Previous Next

1. Select "Get construction schedule".

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.

Get construction schedule
Get a construction schedule from Unanet

Cancel Next

2. Unanet | Authentication

Authenticate with Unanet.

Edit Integration

PRIMARY SETUP

Unanet | Authentication

Authenticate with Unanet

Unanet connected
PRODUCTIONUS:C719797:T1036009's Unanet account

Select Unanet environment*

Sandbox

Previous Next

3. Unanet | Find construction schedule

Select the fields in this survey that contain the values you want to use to find the construction

schedule in Unanet.


Edit Integration

PRIMARY SETUP

Unanet | Find construction schedule

Select the fields in this survey that contain the values you want to use to find the construction schedule in Unanet.

Use this Alchemer field to match this Unanet field

Step 0 Survey Listener Questions - Iniate 1. 1 (id: 2) ▼	Unanet ProjectId ▼	
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[Add a new mapping](#)

Progress indicator: 1 of 3 steps (current step is active)

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

4. Unanet | Setup complete.

Edit 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.

Progress indicator: 4 of 4 steps (current step is active)

[Previous](#) [Save](#)

Now what / Where is my data?

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

- Add merge codes with schedule dates in email or survey steps
- Trigger workflow logic based on project milestones
- Personalize surveys or communications with project-specific construction schedule data

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