

# 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.

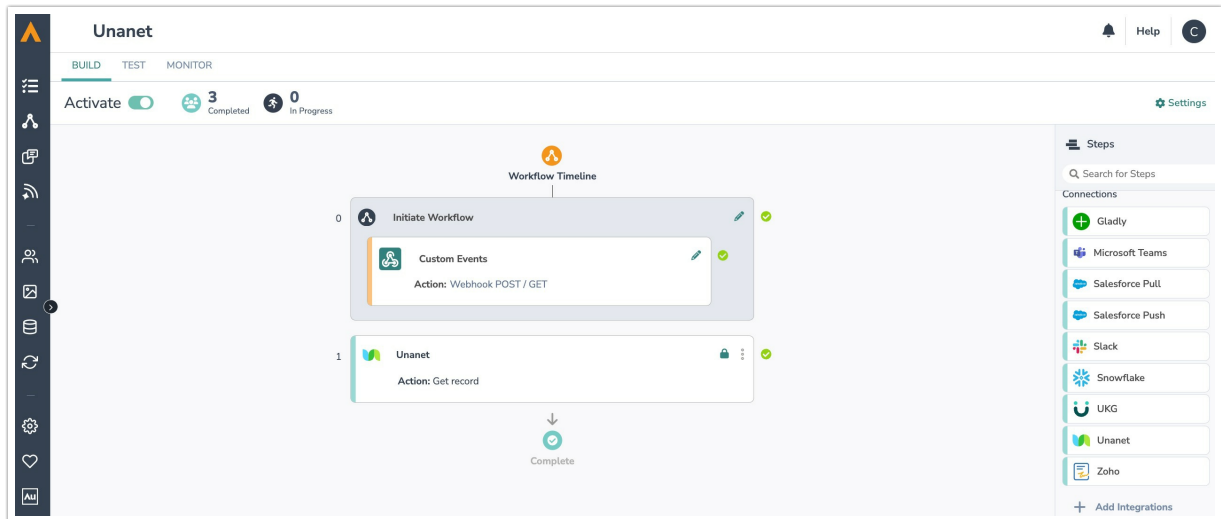
## Adding a Unanet Step to your Workflow

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.

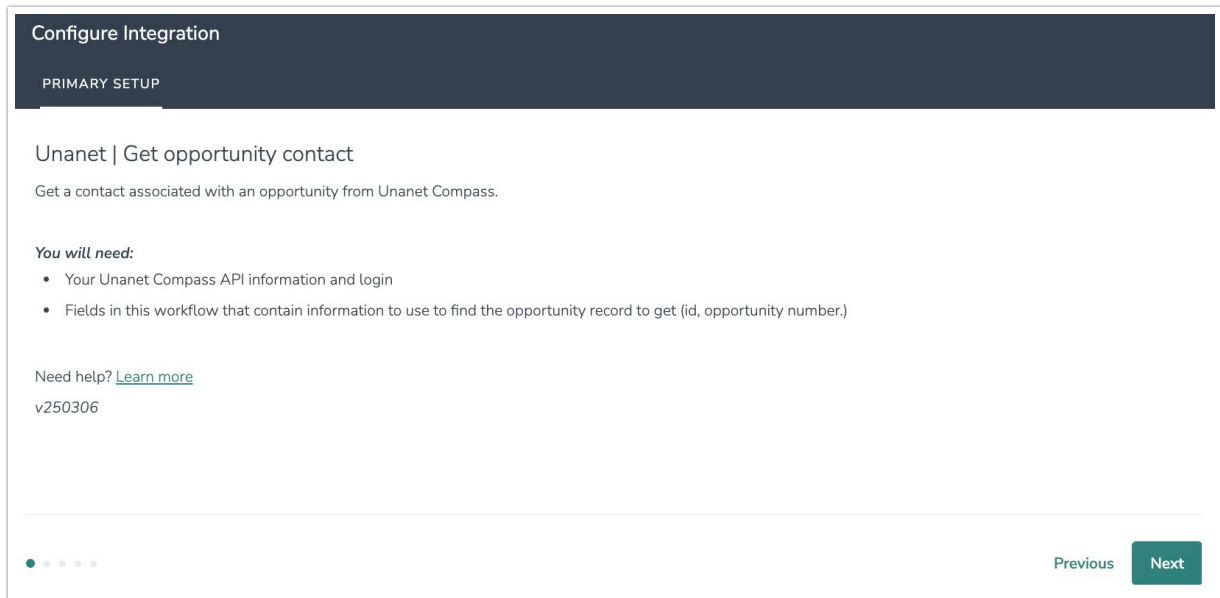
1. Select "Get opportunity contact" for your action.

The screenshot shows a 'Configure Integration' interface. At the top, there is a dark header with the text 'Configure Integration' and 'PRIMARY SETUP' below it. A '< Back' link is visible. The main section is titled 'Select Action' and contains the instruction 'Select the action you would like to perform.' Below this, there are two selectable options in rounded rectangular boxes. The first option is 'Get record' with the subtext 'Get a record from Unanet Compass'. The second option is 'Get opportunity contact' with the subtext 'Get a contact associated with an opportunity from Unanet Compass'. The 'Get opportunity contact' option is highlighted with a light blue background. At the bottom right of the screen, there are two buttons: 'Cancel' and 'Next'. The 'Next' button is highlighted in a teal color, indicating it is the selected action.

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

Before configuring this integration action, you will need:

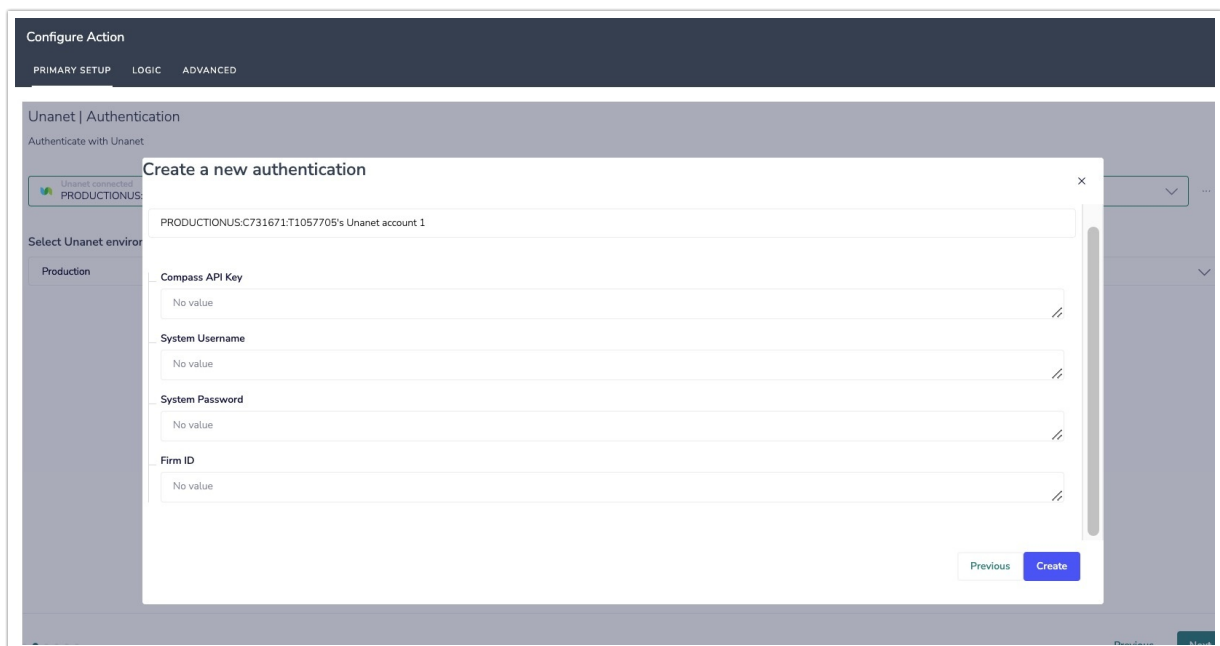
- Your Unanet Compass API information and login
- Fields in this survey that contain information to use to find the record to get (id, email, etc.)



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.



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.

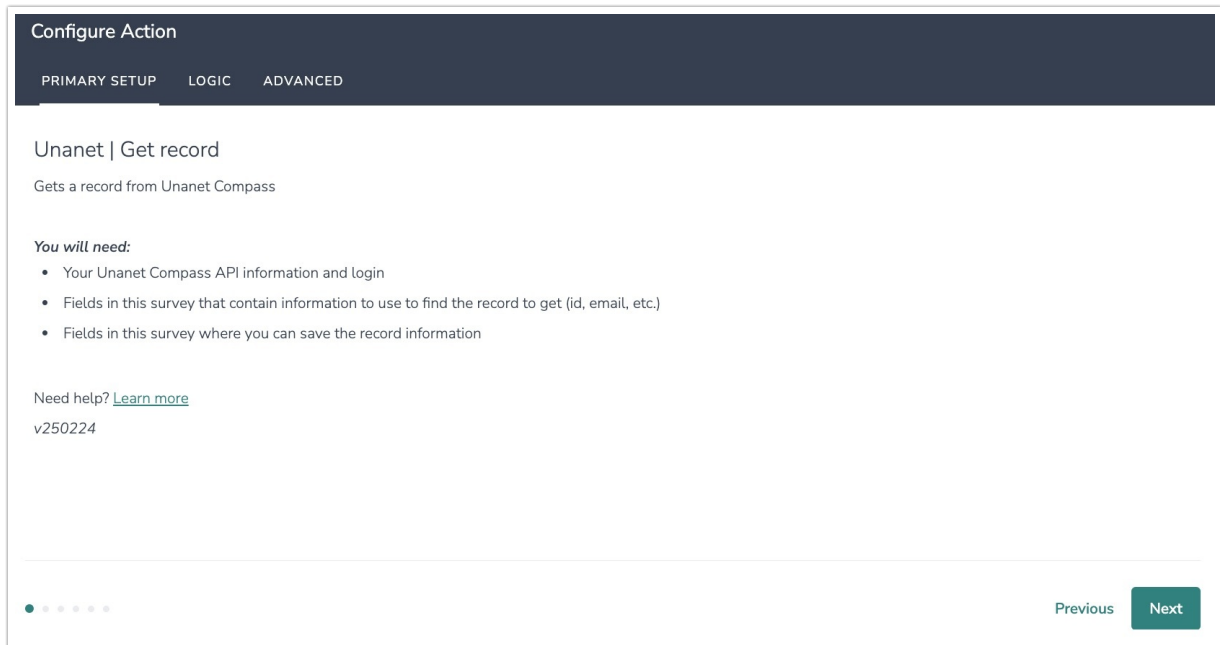
1. Select "Get Record" for your action.

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 buttons: 'Get record' (with subtext 'Get a record from Unanet Compass') and 'Get opportunity contact' (with subtext '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:

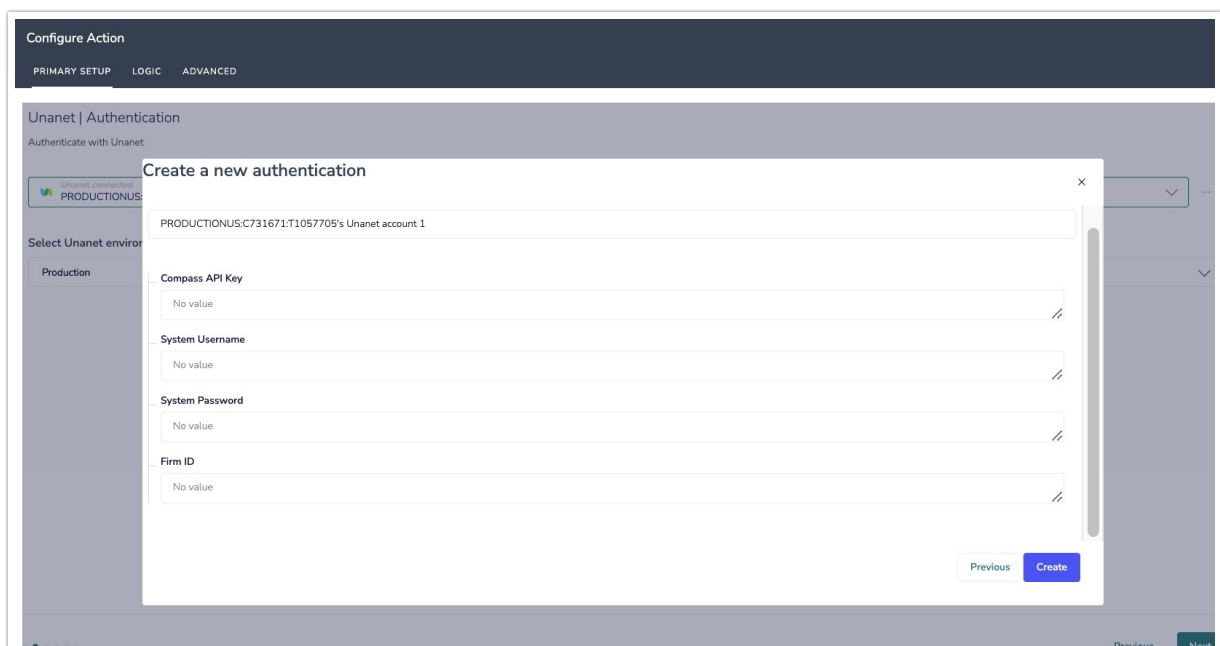
- Your Unanet Compass API information and login
- Fields in this survey that contain information to use to find the record to get (id, email, etc.)
- Fields in this survey where you can save the record information



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?

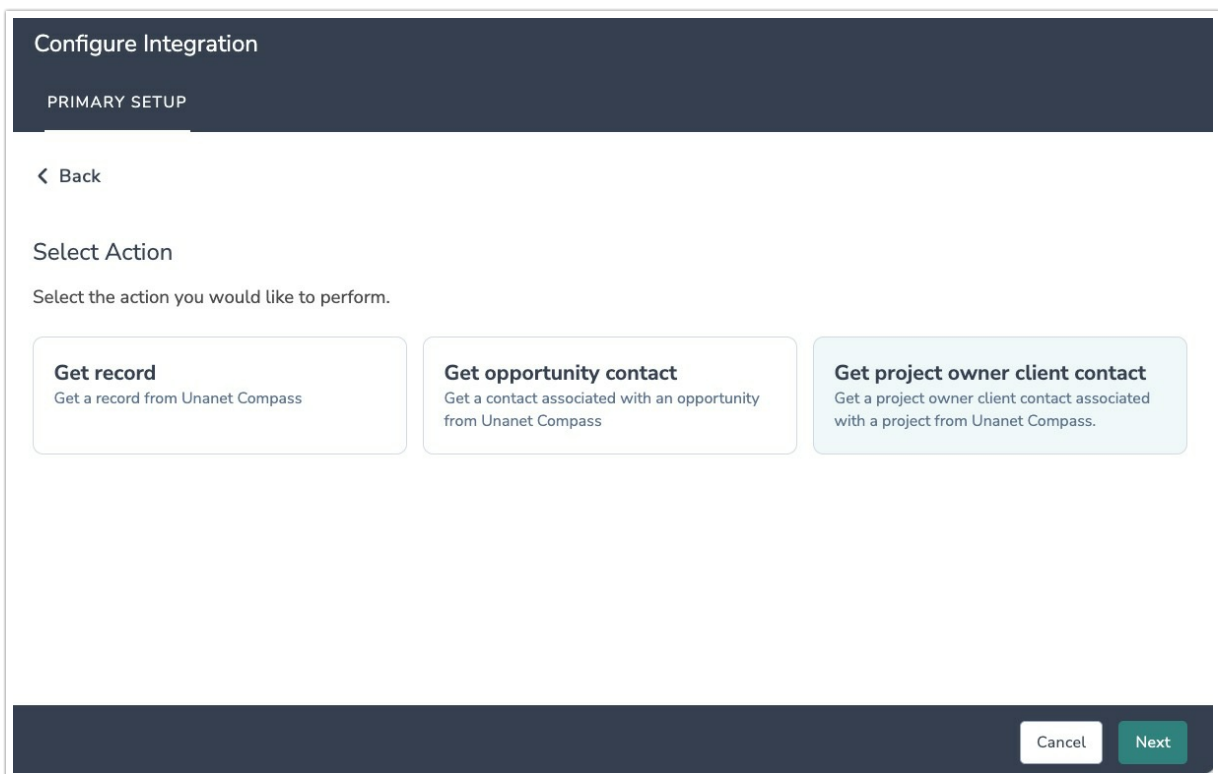
All of the information from this integration is now available in this workflow and all surveys in this workflow. You can use them to:

- 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' interface. At the top, there is a dark header with the text 'Configure Integration' and 'PRIMARY SETUP' below it. A back arrow and the text '< Back' are visible. The main section is titled 'Select Action' with the instruction 'Select the action you would like to perform.' Below this, three action cards are displayed: '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 with a light blue background. 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.

The screenshot shows the 'Configure Action' interface with the 'PRIMARY SETUP' tab selected. The main heading is 'Unanet | Authentication' with the sub-heading 'Authenticate with Unanet'. A modal window titled 'Create a new authentication' is open, showing the following fields:

- Account Name: PRODUCTIONUS:C731671:T1057705's Unanet account 1
- Compass API Key: No value
- System Username: No value
- System Password: No value
- Firm ID: No value

At the bottom of the modal, there are 'Previous' and 'Create' buttons. The background interface shows a 'Select Unanet environ' dropdown menu with 'Production' selected.

4. Select your Unanet environment.

The screenshot shows a 'Configure Action' window with a dark header. Below the header, there are three tabs: 'PRIMARY SETUP', 'LOGIC', and 'ADVANCED'. The 'PRIMARY SETUP' tab is active. The main content area is titled 'Unanet | Authentication' and includes the instruction 'Authenticate with Unanet'. There is a dropdown menu showing 'Unanet connected' and 'PRODUCTIONUS:C731671:T1057705's Unanet account'. Below this is another dropdown menu labeled 'Select Unanet environment\*' with 'Production' selected. At the bottom right, there are 'Previous' and 'Next' buttons, with 'Next' being highlighted in green.

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. Below the header, there is a 'PRIMARY SETUP' tab. The main content area is titled 'Unanet | Sample project' and includes the instruction '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 labeled 'Sample Project Number\*' with the value '123456' entered.

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

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## 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) <span>▼</span>	Unanet   ProjectId <span>▼</span>	
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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