

Unanet Intregation 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

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

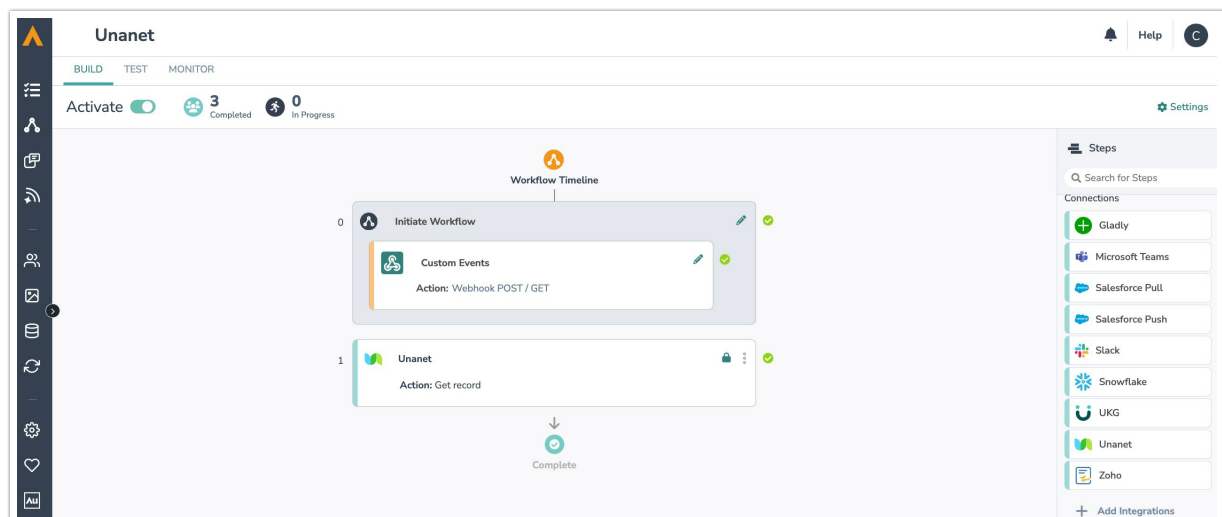
Adding a Unanet Step to your Workflow

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.

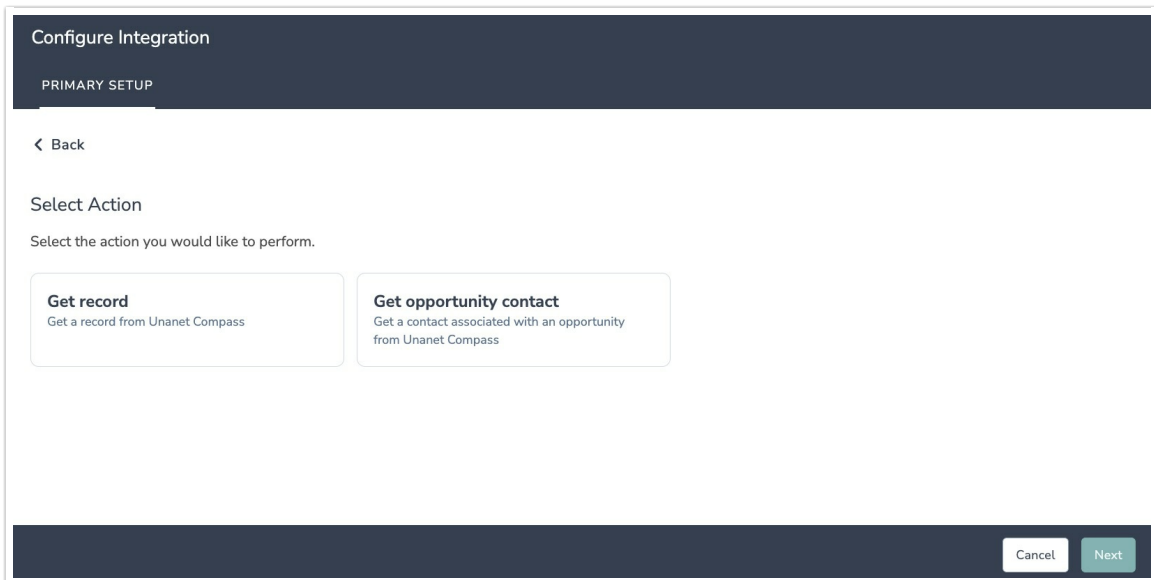


3. Click the pencil icon to configure your Unanet integration step.



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

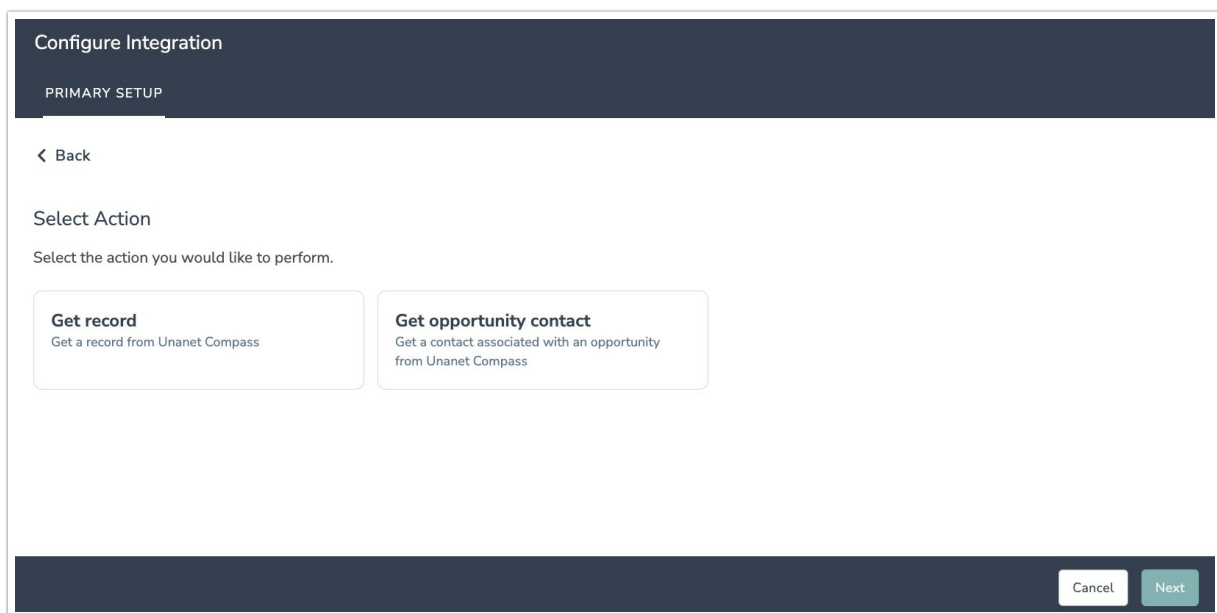
- Get record: Get record from Unanet Compass. [Jump to section.](#)
- Get opportunity contact: Get a contact associated with an opportunity in Unanet Compass. [Jump to section.](#)



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

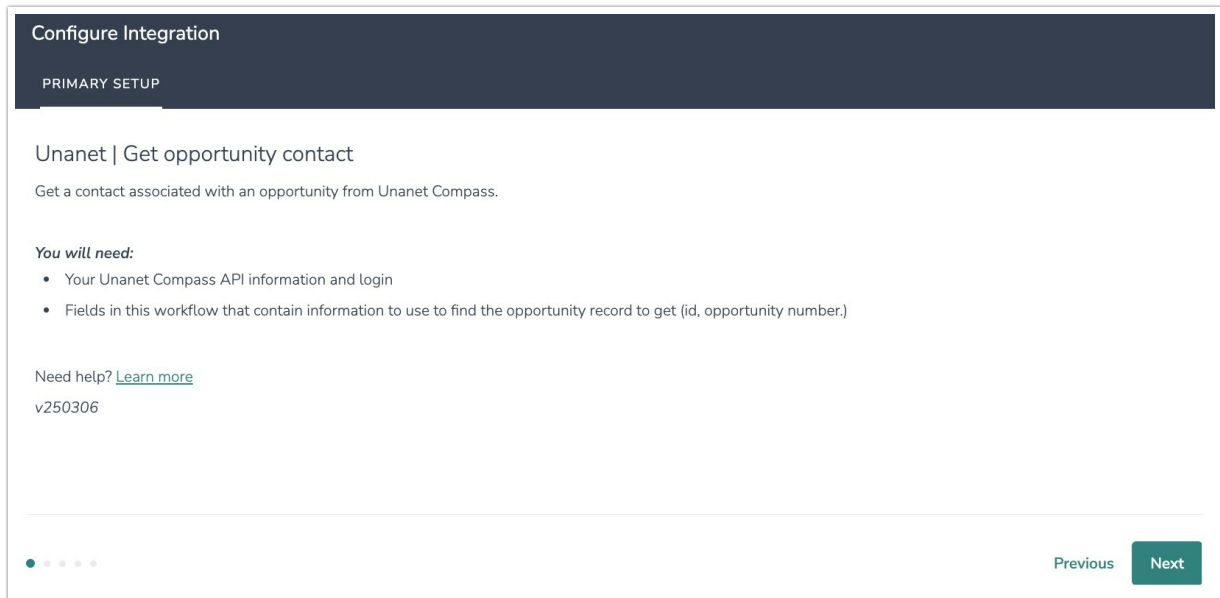
Get opportunity contact
Get a contact associated with an opportunity from Unanet Compass

Cancel Next

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

Before configuring this integration action, you will need:

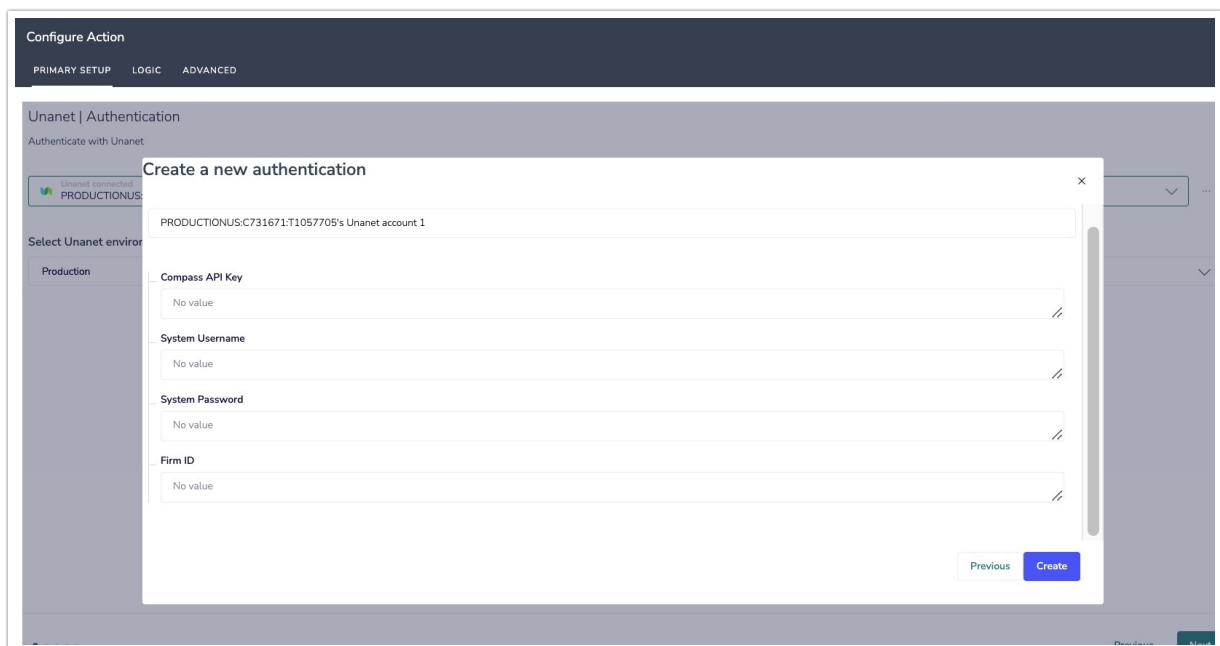
- Your Unanet Compass API information and login
- Fields in this survey that contain information to use to find the record to get (id, email, etc.)



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

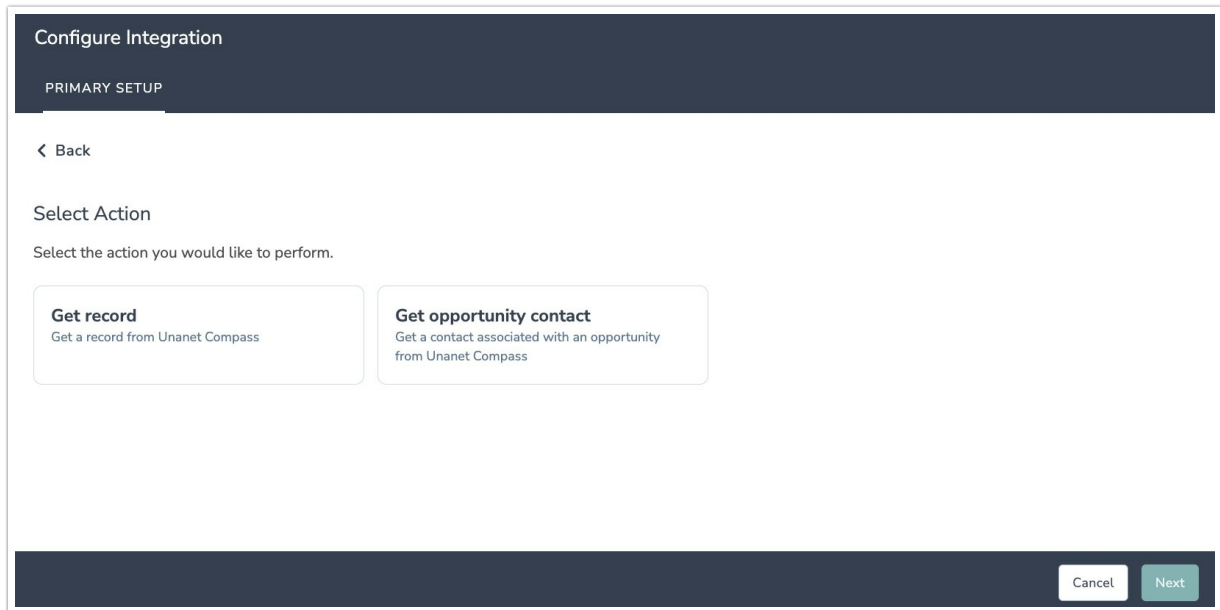
Now what / Where is my data?

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

1. Select "Get Record" for your action.

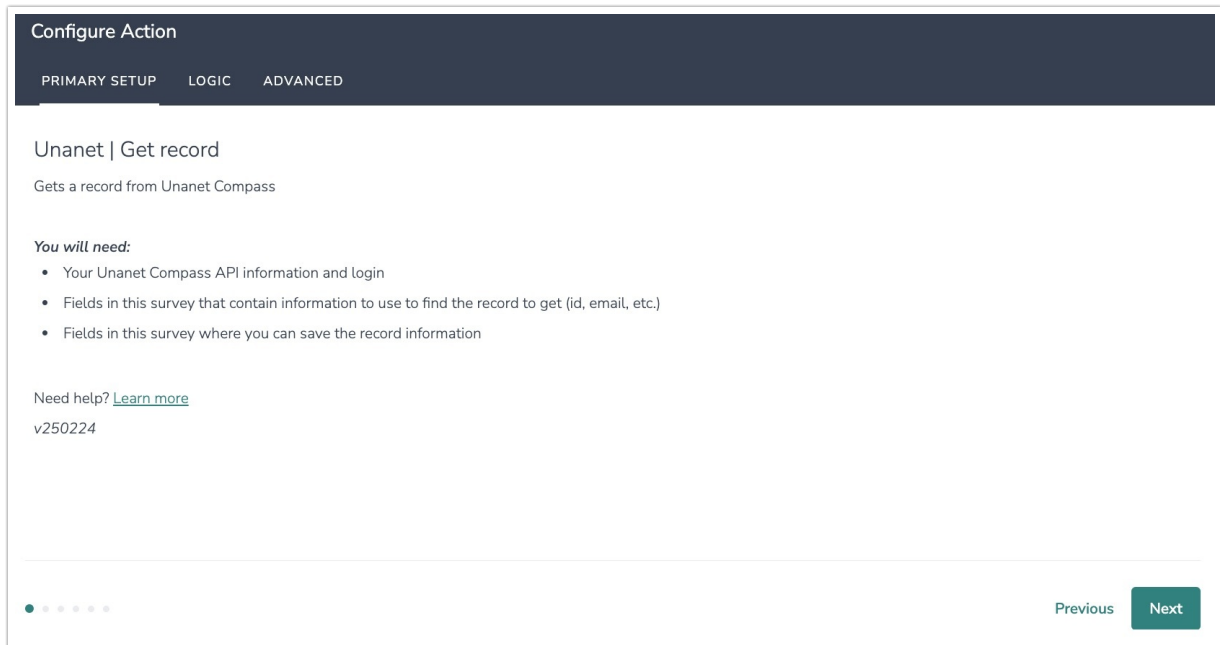


The screenshot shows a 'Configure Integration' interface. At the top, it says 'Configure Integration' and 'PRIMARY SETUP'. Below that is a '< Back' link. The main section is titled 'Select Action' with the instruction 'Select the action you would like to perform.' There are two buttons: 'Get record' (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 a teal color.

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

Before configuring this integration action, you will need:

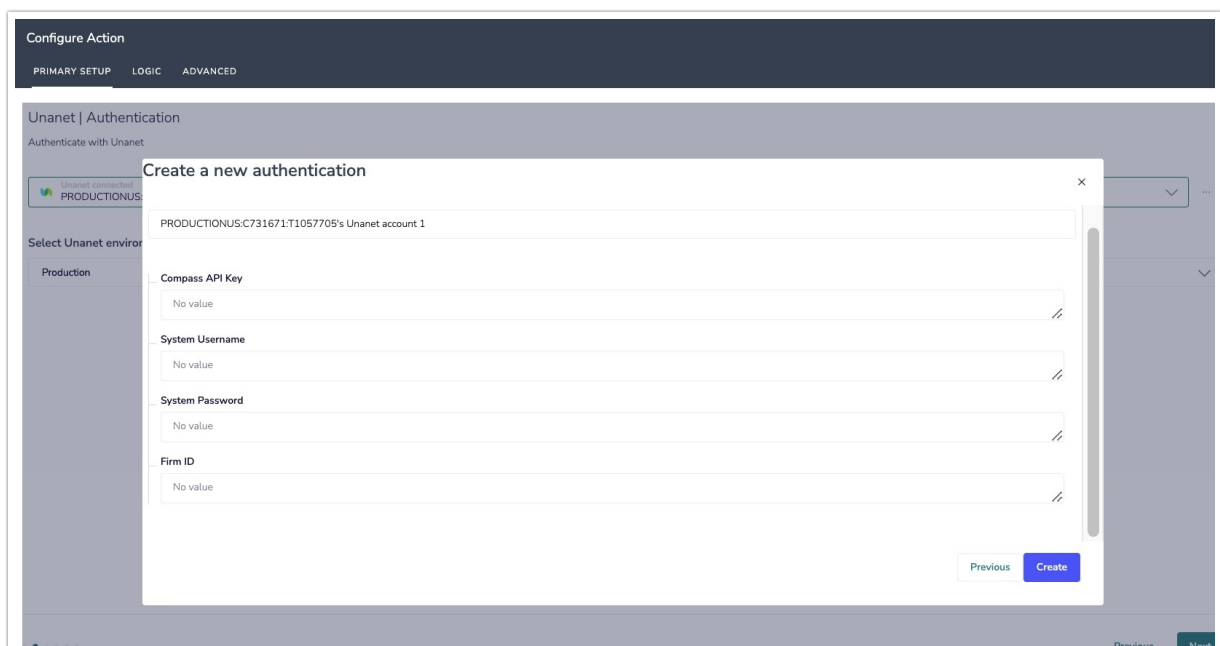
- Your Unanet Compass API information and login
- Fields in this survey that contain information to use to find the record to get (id, email, etc.)
- Fields in this survey where you can save the record information



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

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:

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Previous Save

Now what / Where is my data?

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- 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
