

Unanet Integration for Alchemer Survey

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

With the Alchemer Unanet integration you can easily:

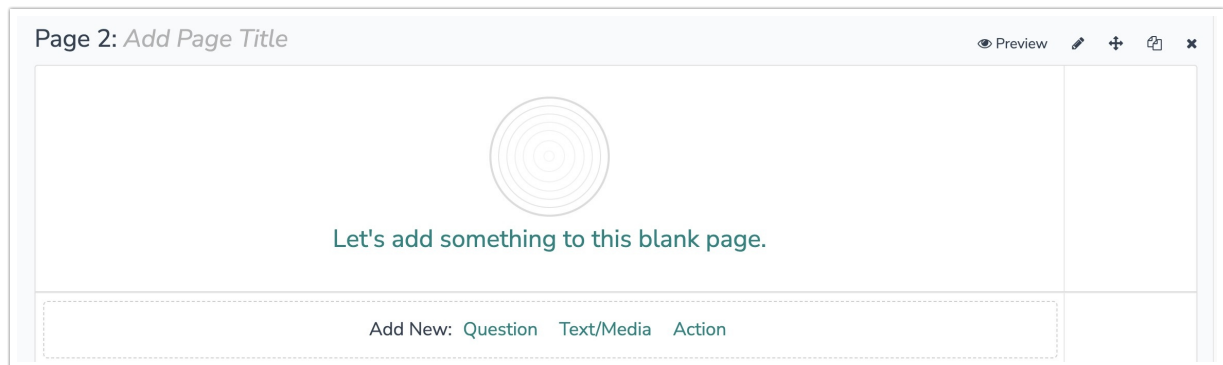
- Personalize surveys in Alchemer using records from Unanet.

Integration Setup

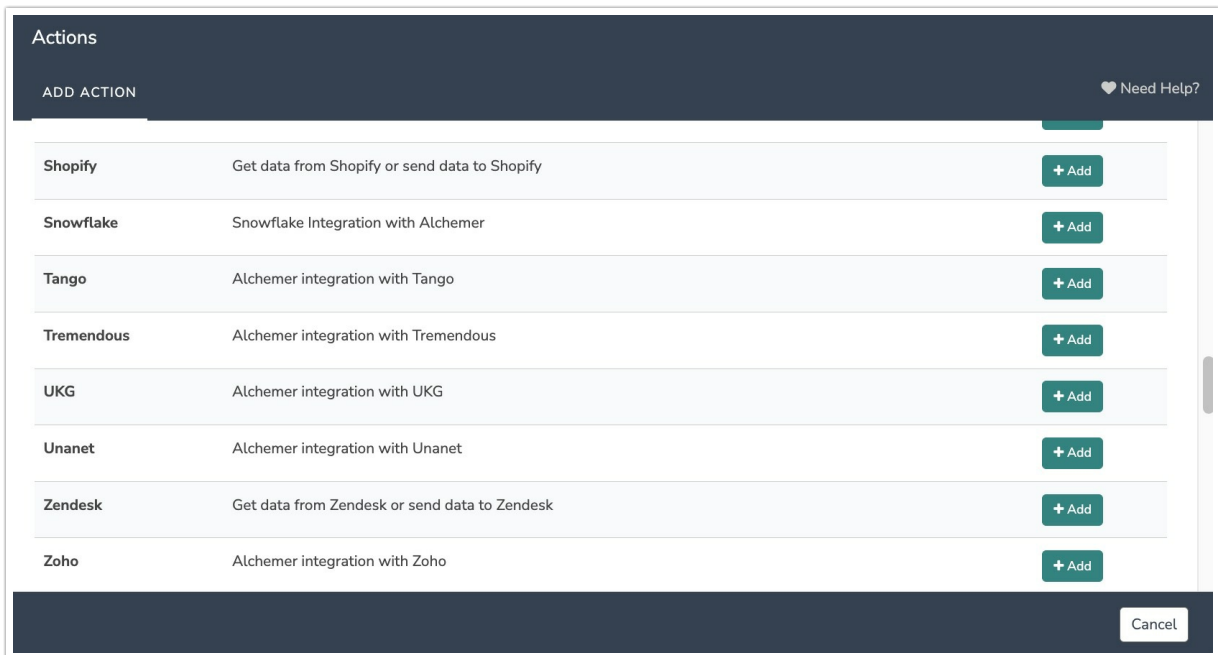
Adding an Integration Action

1. Select an existing survey or create a new survey. Then navigate to the Survey Builder.
2. Click "Add New: Action"

You cannot add this Integration Action to the first page of the survey.



3. In the Add Action modal, scroll down to Integrations. Then click "Add" for your Unanet integration.



If you haven't purchased any additional integrations, you will see the below screen:

Integrations

Don't see what you're looking for? [Explore our integrations](#)

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

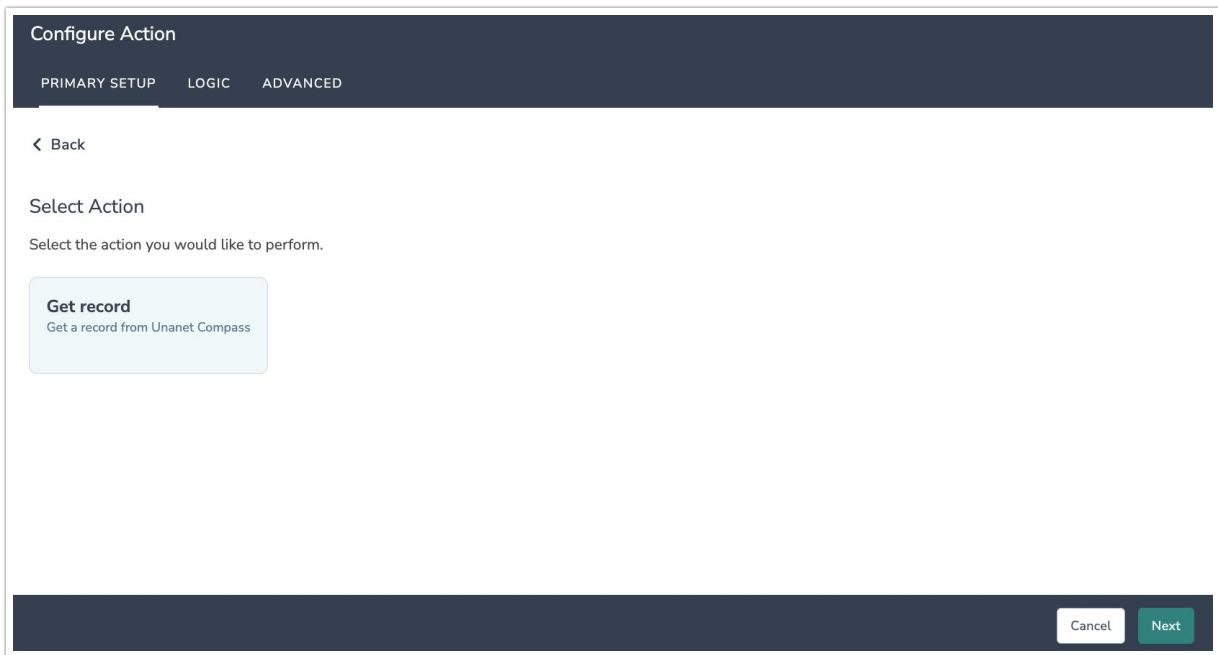
- Get record from Unanet

Unanet | Get Record

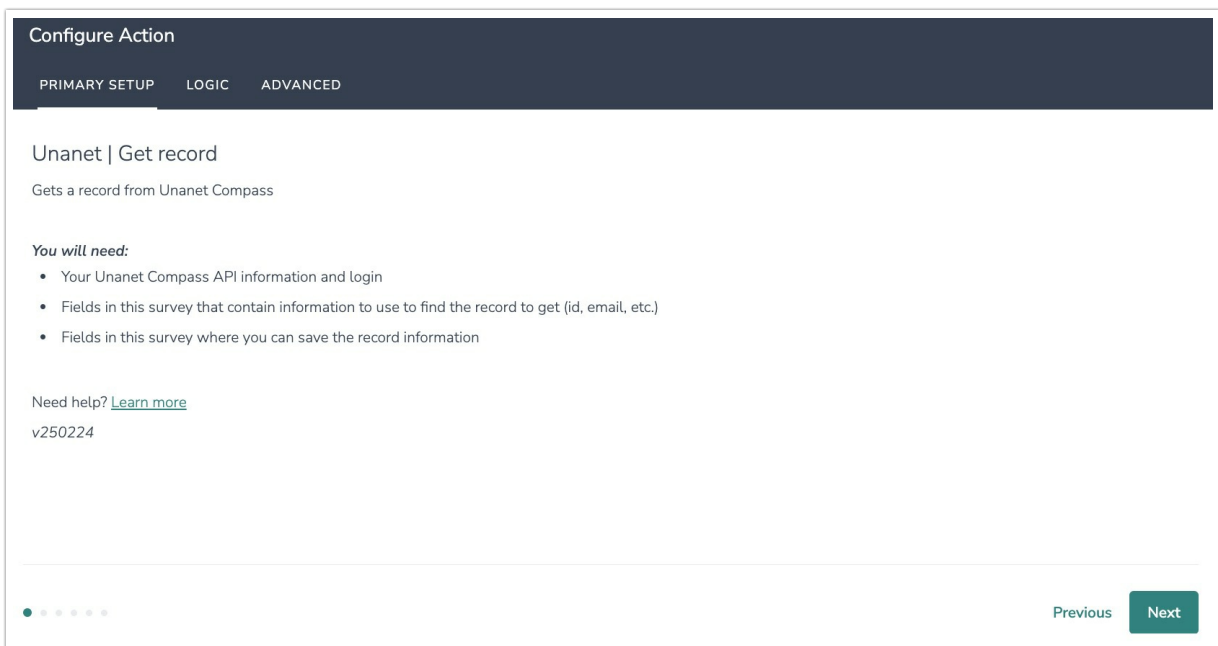
Before configuring this integration action, you will need:

- 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

1. Select "Get record" and click "Next" on the integration overview screen.



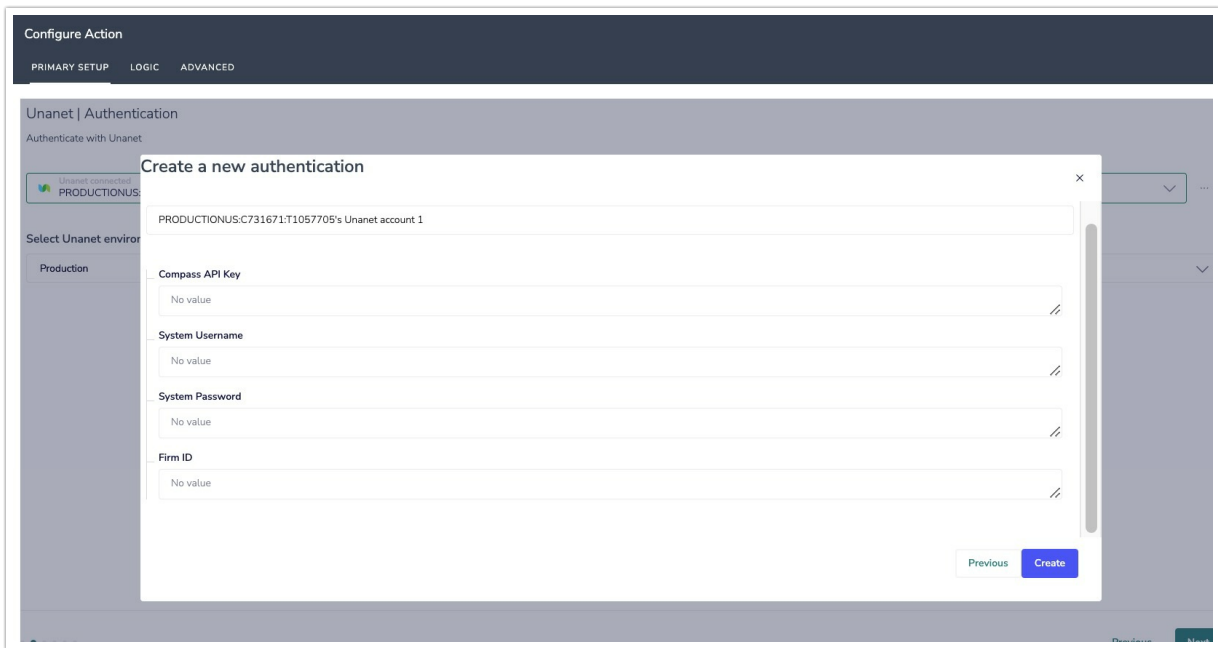
2. Click "Next" on the integration overview screen.



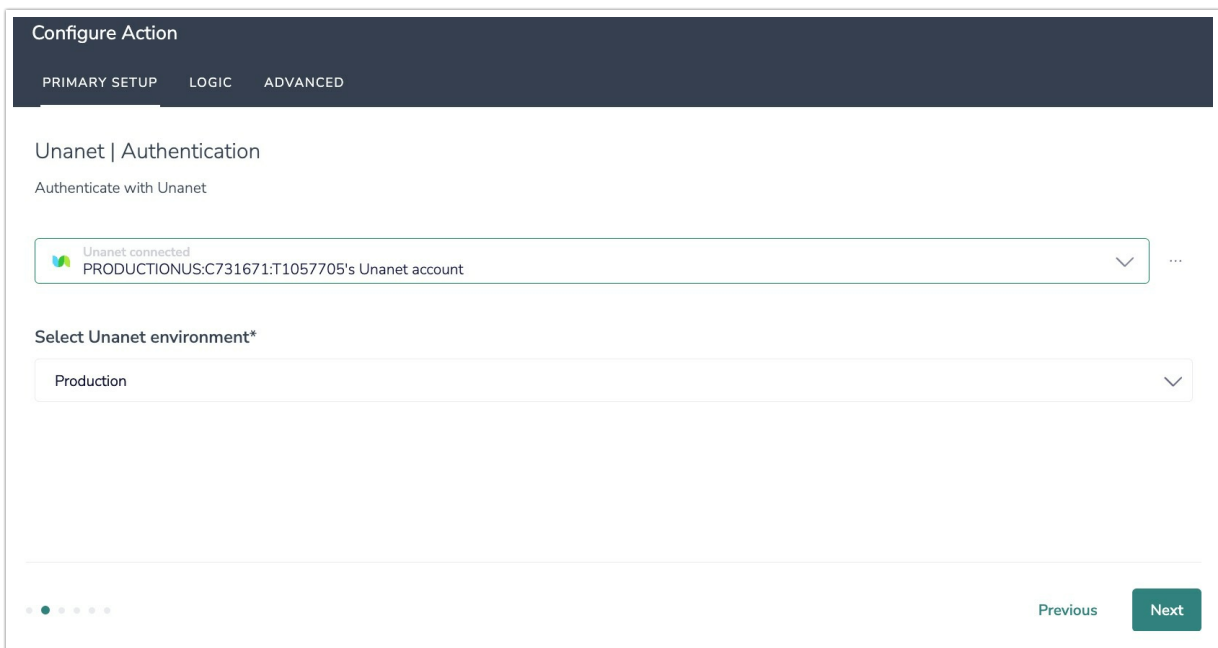
3. Click "Add a new account". Then name your authentication and provide your:

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

Click "Create" when done.



4. Select your Unanet environment.



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

How to Create Fields in Alchemer

1. Add survey questions that when answered will provide the desired field. (Example: What is the customer email address?)
2. Create a container using a [Hidden Value](#). These Hidden Values can then be mapped to fields in Gladly and used as [Merge Codes](#) in your survey.

7. Select the fields you want to get back for use in your Alchemer Survey. This will pull in data from an existing record in Unanet and update the corresponding field in Alchemer.

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Unanet | Get data back

Select the fields you want to get back.

Use this Unanet field	To update this Alchemer survey field
Unanet Email	Question 4. Output question 1 (id: 7)
Action Metadata status_code	Question 5. Output question 2 (id: 8)
Action Metadata message	Question 6. Output question 3 (id: 9)

Add a new mapping

Previous **Next**

8. Click "Save" to complete setup.

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Unanet | Setup complete

A log of each run result can be found in the Individual Responses > Action Log.

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

Monitoring an Unanet Integration Action

A log of each run result can be found in Results > Individual Responses > Action Log.

Select an individual response and then navigate to the Action Log. In the Action Log, you can monitor whether the action was successful.

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 Alchemer!

Related Articles