

# Excel Integration for Alchemer Workflow

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

With the Alchemer Excel integration you can easily:

- Push workflow data from Alchemer into a Excel Worksheet.
- Update an Excel worksheet with data from Alchemer Workflow
- Get data from Excel for use in Alchemer Workflow

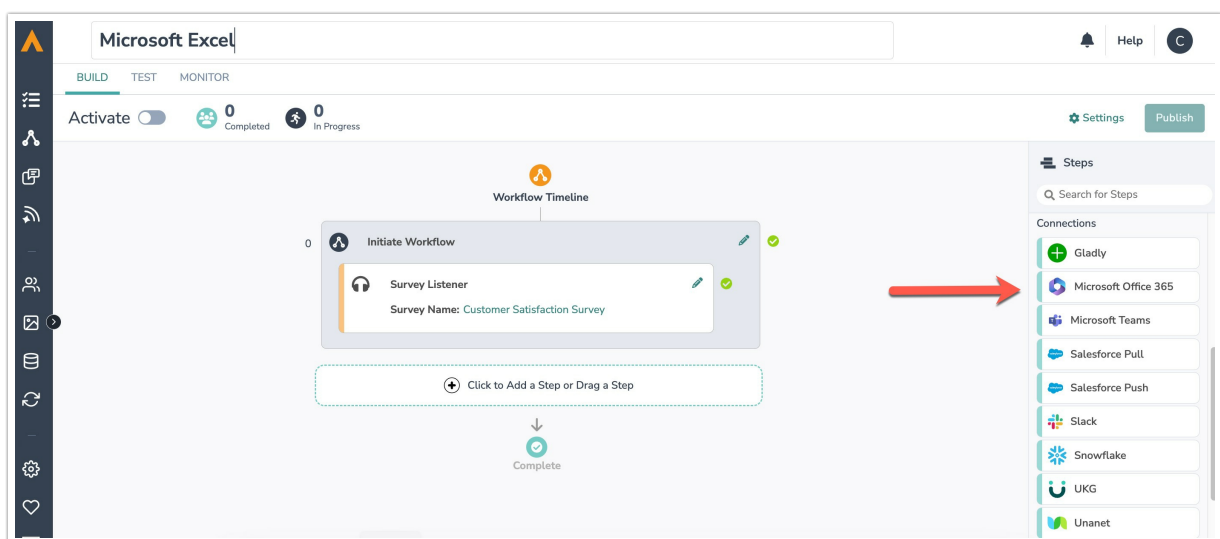
## Adding a Excel Step to your Workflow

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 Microsoft 365 step to your Workflow, drag the Microsoft 365 step from the Step Library under Connections.



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

1  Microsoft Office 365   

4. Select the action you would like to perform:

- Excel: Push data to a worksheet. [Jump to section.](#)
- Excel: Update data in a worksheet. [Jump to section.](#)
- Excel: Get data from a worksheet. [Jump to section.](#)

**Configure Integration**

PRIMARY SETUP

< Back

Select Action

Select the action you would like to perform.

**Excel | Get data from Excel**  
Get data from an Excel worksheet

**Excel | Update data in Excel**  
Update an Excel worksheet

**Excel | Push data to Excel**  
Push data to an Excel worksheet

Cancel Next

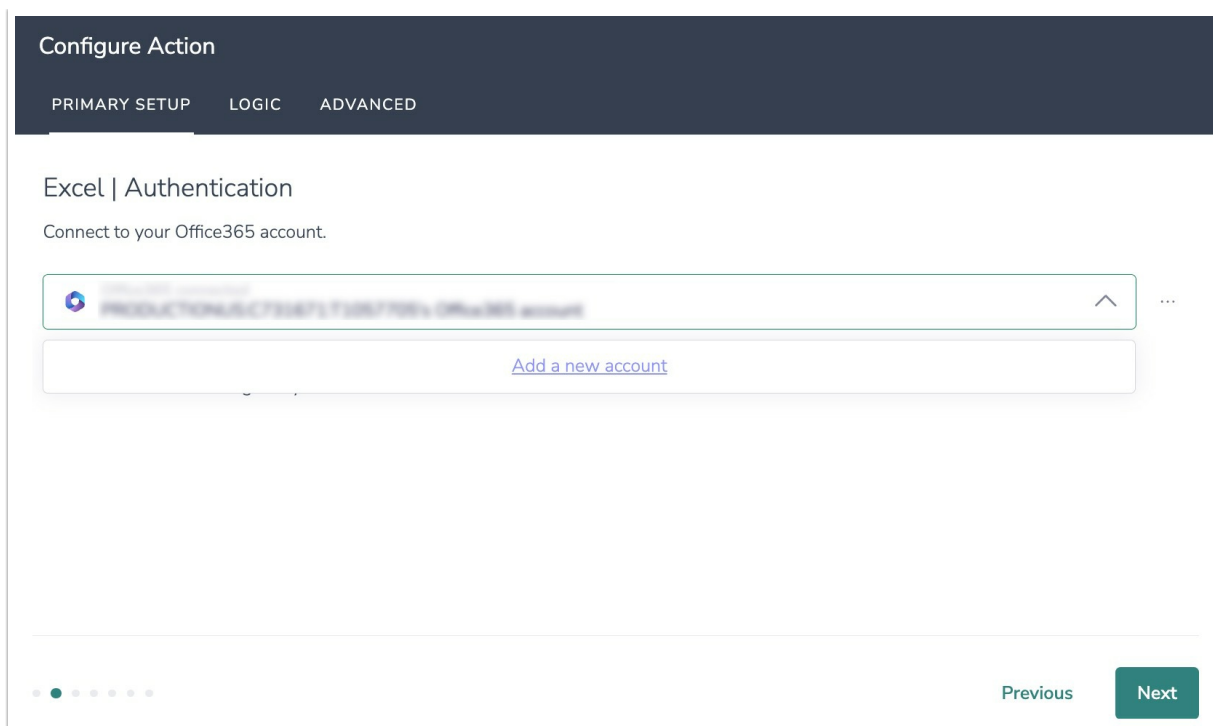
## Excel | Push data to Excel

***You will need:***

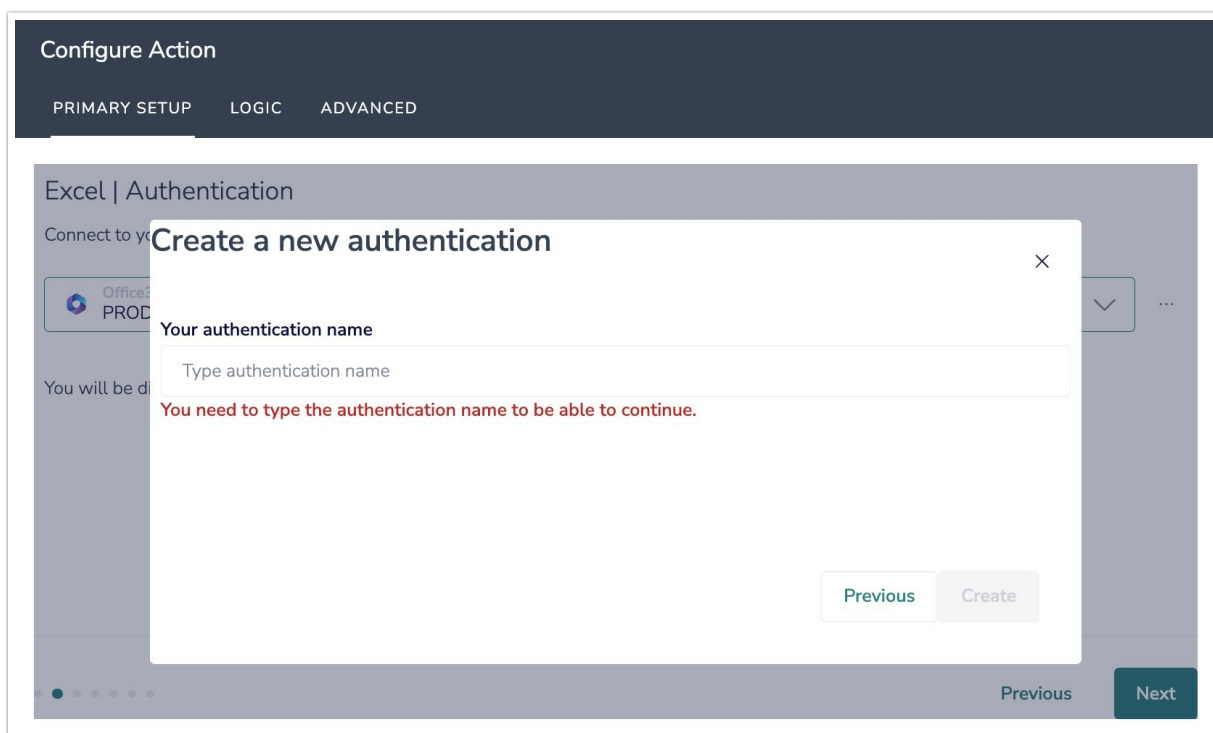
- Your Office 365 login information
- Fields in this workflow that contain the data you want to use to insert data into your worksheet.

1. Select "Excel | Push Data to Excel" as your action.



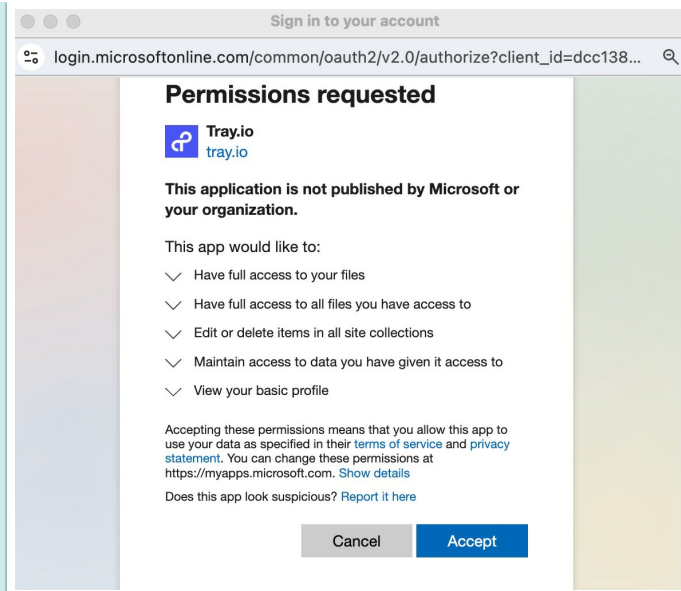


4. Name your new authentication and click "create".

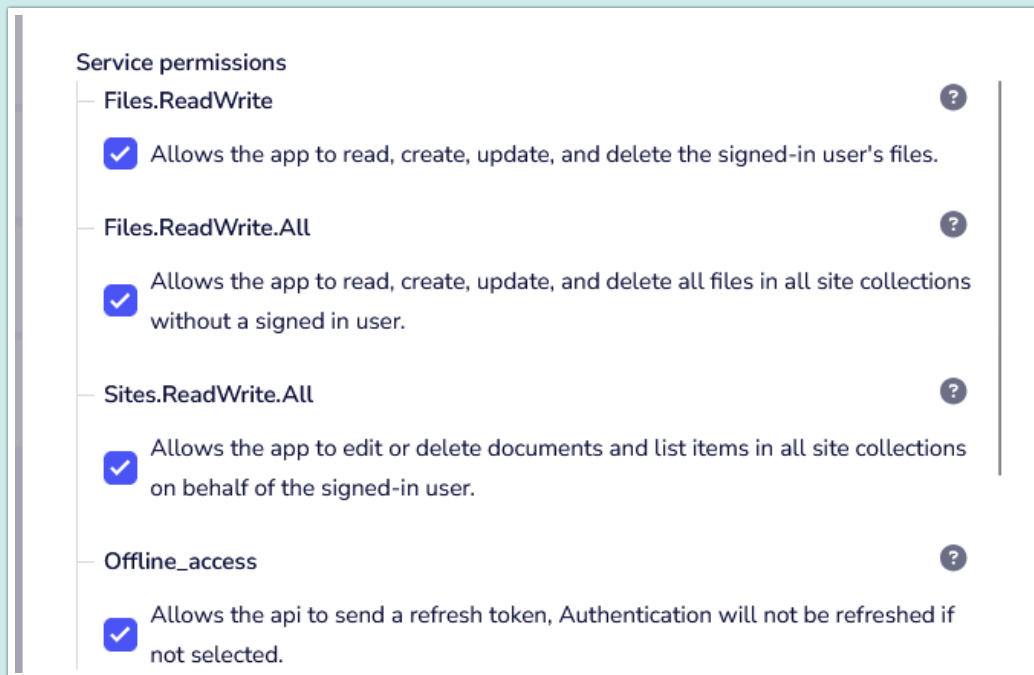


5. In the sign-in window that appears input your Microsoft 365 credentials. Once complete, return to the setup wizard in Alchemer.

After signing in you will need to grant Alchemer (Tray.io) access to Microsoft 365.



You will need the following permissions:



6. Please select if the file you would like to use is on OneDrive or SharePoint.

## Configure Integration

PRIMARY SETUP

### Excel | OneDrive or SharePoint

Please select if the file you would like to use is on OneDrive or SharePoint

**OneDrive or SharePoint\***

- OneDrive
- SharePoint

Progress indicator: 1 of 7 steps (1st step active)

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

7. Please enter the folder path where your Excel workbook is located.

## Configure Integration

PRIMARY SETUP

### Excel | Folder path

Please enter the folder path where your Excel workbook is located.

*Example:*  
*/MyFolder/MySubFolder*

**Folder path\***

- Use / for the root folder
- Do not include the file name or extension
- Do not include "Shared Documents"
- Separate each folder with a slash

Progress indicator: 2 of 7 steps (2nd step active)

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

8. Choose the Excel workbook that you would like to use to insert data into.

### Configure Action

PRIMARY SETUP LOGIC ADVANCED

#### Excel | Choose Workbook

Choose the Excel workbook that you would like to use to insert data into.

**Select Workbook\***

1 NPS Excel sheet demo.xlsx

Previous Next

9. Choose the Excel worksheet that you would like to use to insert data into.

### Configure Action

PRIMARY SETUP LOGIC ADVANCED

#### Excel | Choose Worksheet

Choose the Excel worksheet that you would like to use to insert data into.

**Select Worksheet\***

Sheet1

Previous Next

10. Choose the Excel table that you would like to use to insert data into.

You will need to create a table in your Excel sheet. You can create this by navigating to insert > Table in Excel. [learn more.](#)

### Configure Integration

PRIMARY SETUP

#### Excel | Choose table

Choose the Excel table that you would like to use to insert data into.

**Select table\***

Case\_Studies ▼

*You will need to create a Table in your Excel sheet. You can create this by navigating to Insert > Table in Excel, [learn more.](#)*

Previous **Next**

11. Select the fields in this workflow that contain the values you want to use to add a new row in Excel.

### Configure Integration

PRIMARY SETUP

#### Excel | Add data to table

Select the fields in this workflow that contain the values you want to use to add a new row in Excel

Use this Alchemer field to match this Excel field

Step 0 | Survey Listener Questions - Customer Satisfact... ▼ A | Case Study ▼ 🗑️

Add a new mapping

**Data prep options\***

Strip HTML tags from inputs ▼

Previous **Next**

12. Click "Save" to complete the integration setup

### Configure Integration

PRIMARY SETUP

#### Excel | 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 row was successfully added.  
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:

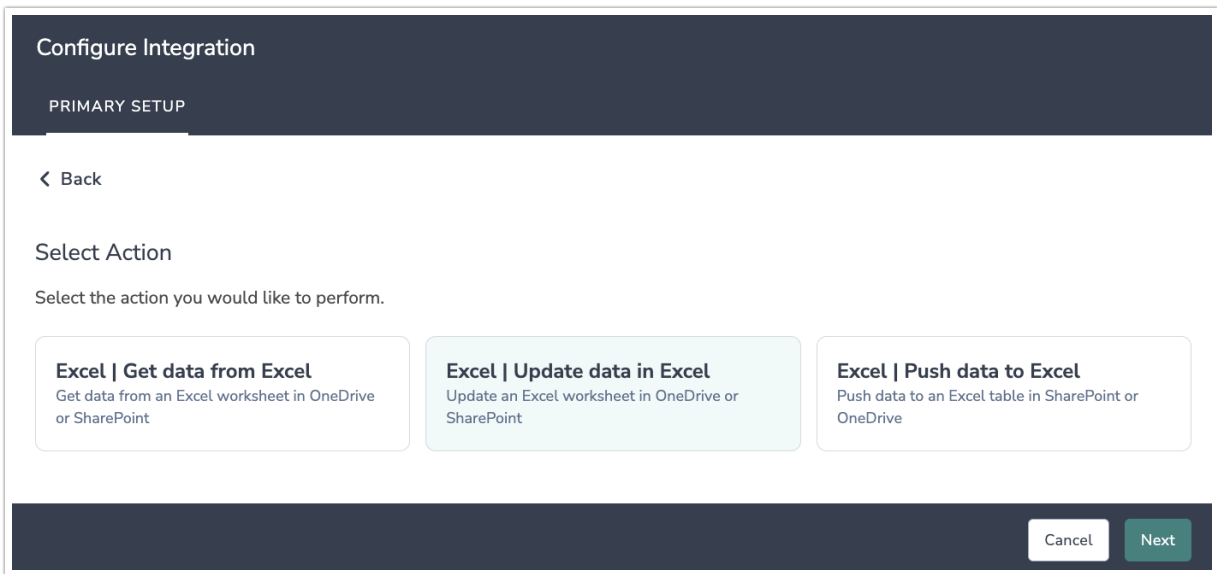
- Add Merge Codes to Email or Survey Invite steps.
- Use with Logic in the workflow.
- Use to personalize the survey in the workflow.

## Excel | Update data in Excel

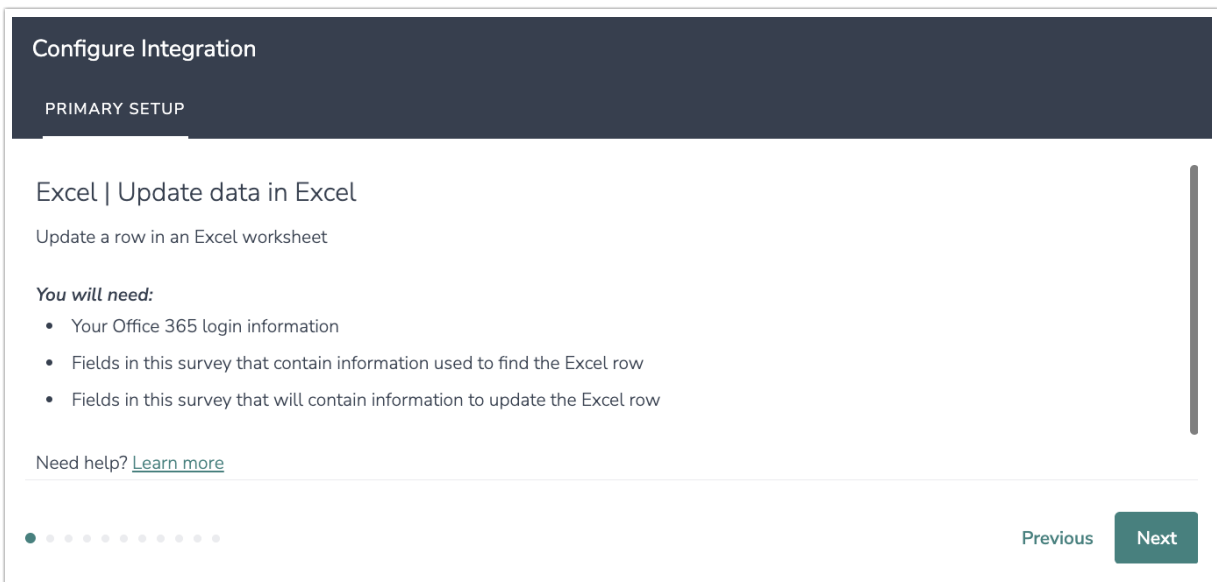
#### *You will need:*

- Your Office 365 login information
- Fields in this survey that contain information used to find the Excel row
- Fields in this workflow used to add data to an existing Excel row

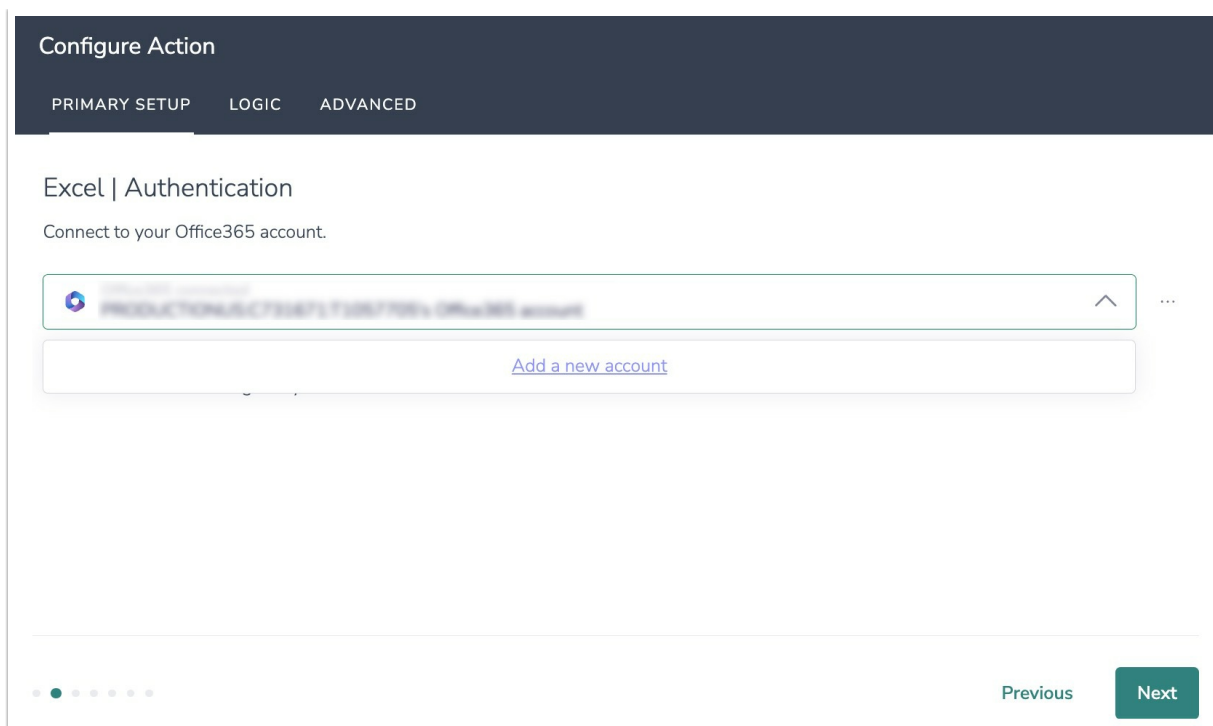
1. Select "Excel | Update data in Excel"



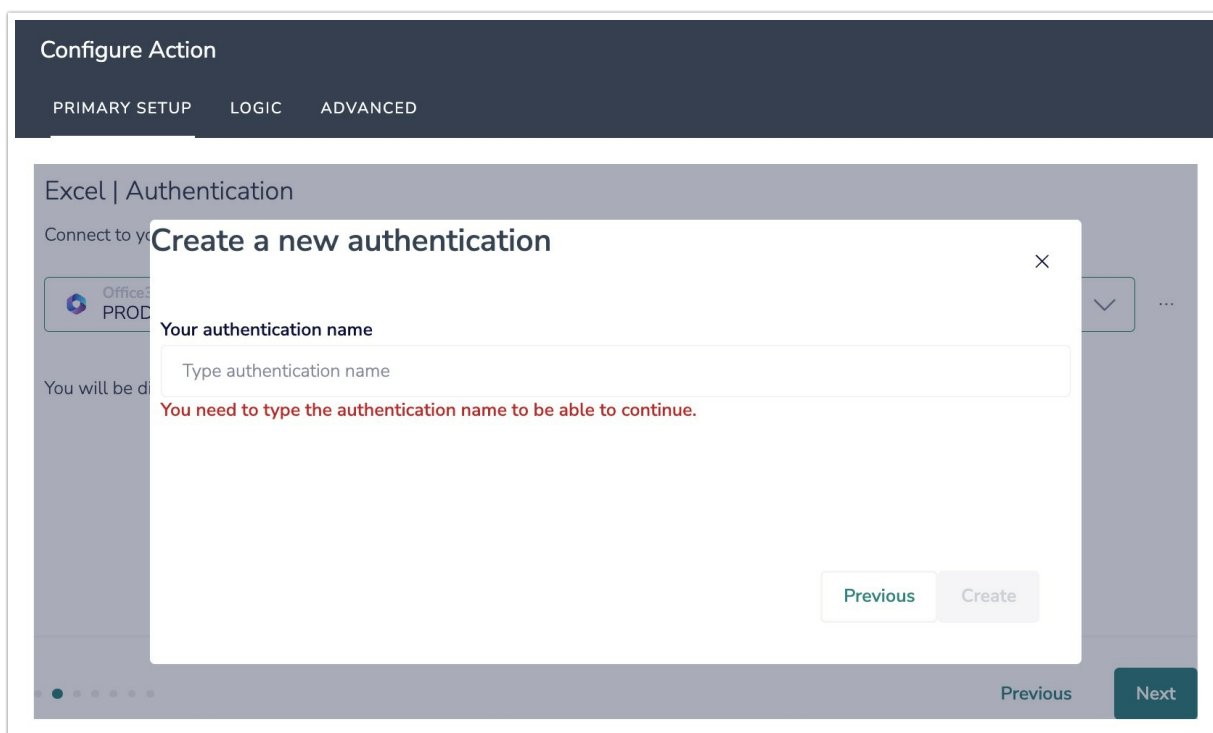
2. Click "Next" on the integration overview screen.



3. Authenticate with your Office 365 account. Click add a new account.

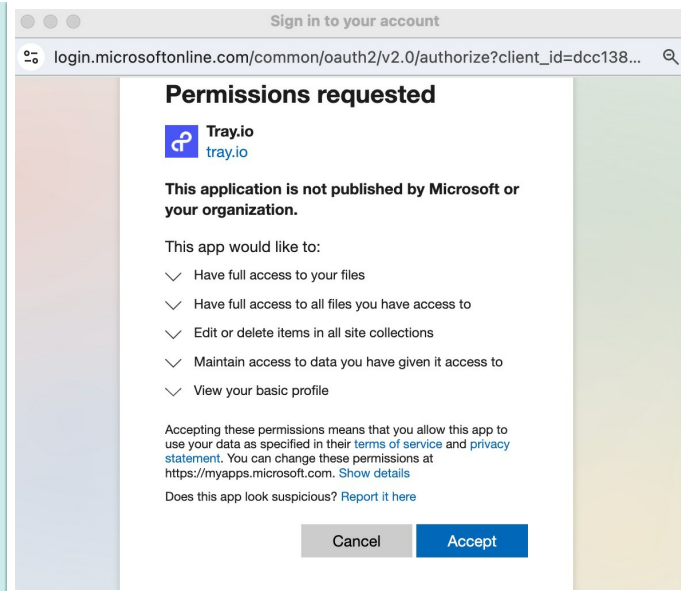


4. Name your new authentication and click "create".

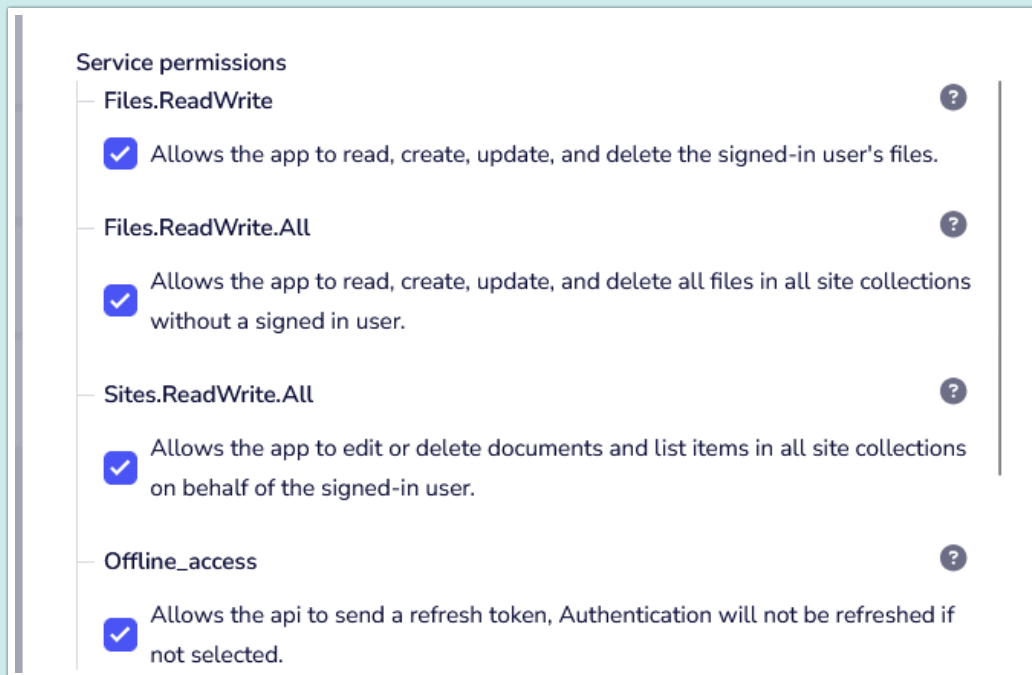


5. In the sign-in window that appears input your Microsoft 365 credentials. Once complete, return to the setup wizard in Alchemer.

After signing in you will need to grant Alchemer (Tray.io) access to Microsoft 365.



You will need the following permissions:



6. Please select if the file you would like to use is on OneDrive or SharePoint.

## Configure Integration

PRIMARY SETUP

### Excel | OneDrive or SharePoint

Please select if the file you would like to use is on OneDrive or SharePoint

**OneDrive or SharePoint\***

- OneDrive
- SharePoint

Progress indicator: 1 of 7 steps (1st step active)

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

7. Please enter the folder path where your Excel workbook is located.

## Configure Integration

PRIMARY SETUP

### Excel | Folder path

Please enter the folder path where your Excel workbook is located.

*Example:*  
*/MyFolder/MySubFolder*

**Folder path\***

- Use / for the root folder
- Do not include the file name or extension
- Do not include "Shared Documents"
- Separate each folder with a slash

Progress indicator: 2 of 7 steps (2nd step active)

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

8. Choose the Excel workbook that you would like to use to insert data into.

### Configure Action

PRIMARY SETUP LOGIC ADVANCED

#### Excel | Choose Workbook

Choose the Excel workbook that you would like to use to insert data into.

Select Workbook\*

1 NPS Excel sheet demo.xlsx

Previous Next

9. Choose the Excel worksheet that you would like to use to insert data into.

### Configure Action

PRIMARY SETUP LOGIC ADVANCED

#### Excel | Choose Worksheet

Choose the Excel worksheet that you would like to use to insert data into.

Select Worksheet\*

Sheet1

Previous Next

10. Choose the Excel table that you would like to use to insert data into.

You will need to create a table in your Excel sheet. You can create this by navigating to insert

> Table in Excel.

### Configure Integration

PRIMARY SETUP

#### Excel | Choose table

Choose the Excel table that you would like to update data in.

Select table\*

Case\_Studies

*You will need to create a Table in your Excel sheet. You can create this by navigating to Insert > Table in Excel, [learn more](#).*

Previous Next

11. Select the fields in this workflow that contain the values you want to use to add a new row in Excel.

## Configure Integration

### PRIMARY SETUP

#### Excel | Find row

Choose the fields in your workflow that you would like to use to find the specific Excel row.

*Please choose one:*

Use this Alchemer field

to match this Excel field

Step 0 | Survey Listener Questions - Customer Satisfact... ▾

C | Content Type ▾



Add a new mapping

#### Input Data Type\*

String ▾

- Choose the data type of the column you select for the input
- Choose a unique field to query on as this only supports a single field
- This will update the first match found



Previous

Next

12. Choose the fields in this workflow that you would like to use to update a row in your Excel worksheet.

## Configure Integration

PRIMARY SETUP

### Excel | Update row

Choose the fields in this workflow that you would like to use to update a row in your Excel worksheet.

Use this Alchemer field to match this Excel field

Step 0 | Survey Listener Questions - Customer Satisfact... ▼

A | Case Study ▼ 🗑️

Add a new mapping

Data prep options\*

Strip HTML tags from inputs ▼

Previous Next

13. Click "Save" to complete the integration setup.

## Configure Integration

PRIMARY SETUP

### Excel | 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 row was successfully added.
- 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.

## Excel | Get data from Excel

### *You will need:*

- Your Office 365 login information
- Fields in this workflow that contain information to use to find the Excel row

1. Select "Excel | Get data from Excel"

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.' Below this are three action cards: 'Excel | Get data from Excel' (highlighted in light blue), 'Excel | Update data in Excel', and 'Excel | Push data to Excel'.

**Configure Integration**

PRIMARY SETUP

< Back

**Select Action**

Select the action you would like to perform.

**Excel | Get data from Excel**  
Get data from an Excel worksheet in OneDrive or SharePoint

**Excel | Update data in Excel**  
Update an Excel worksheet in OneDrive or SharePoint

**Excel | Push data to Excel**  
Push data to an Excel table in SharePoint or OneDrive

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

## Configure Integration

### PRIMARY SETUP

### Excel | Get data from Excel

Get data from a row in Excel

**You will need:**

- Your Office 365 login information
- Fields in this workflow that contain information to use to find the Excel row

Need help? [Learn more](#)

v250423


3. Authenticate with your Office 365 account. Click add a new account.

## Configure Action

### PRIMARY SETUP LOGIC ADVANCED

### Excel | Authentication

Connect to your Office365 account.

  ^ ...

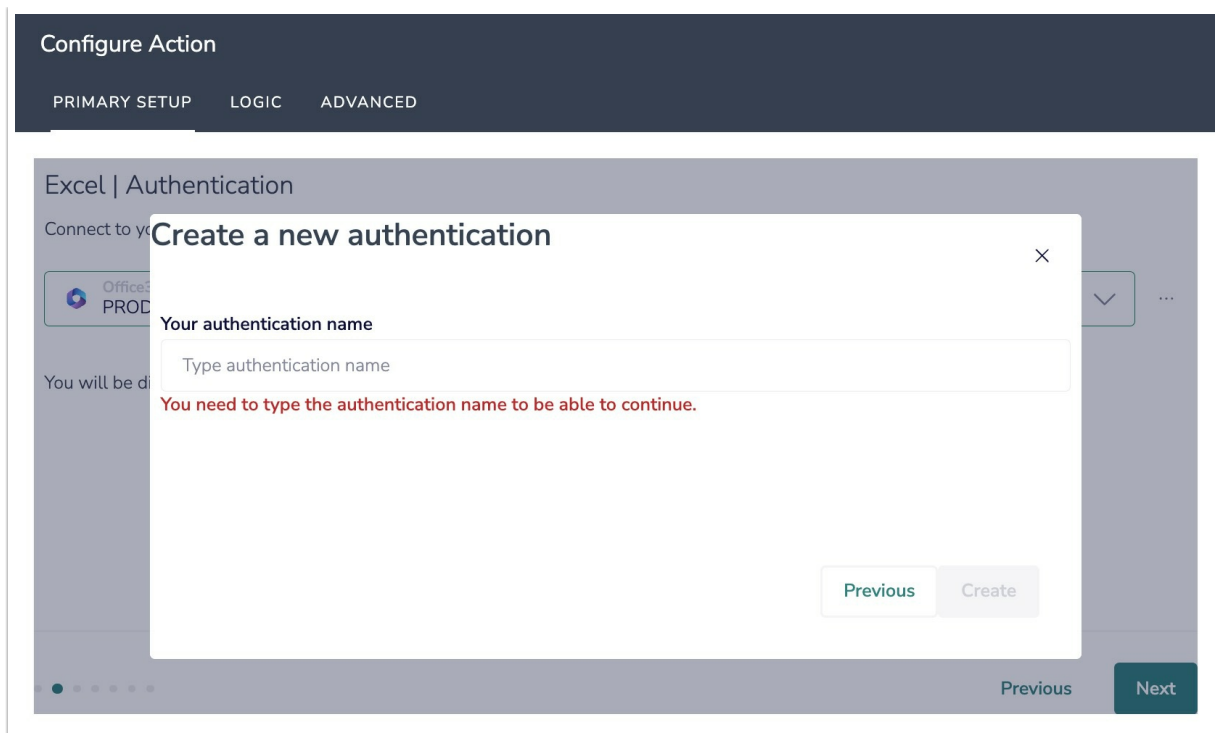
[Add a new account](#)



Previous

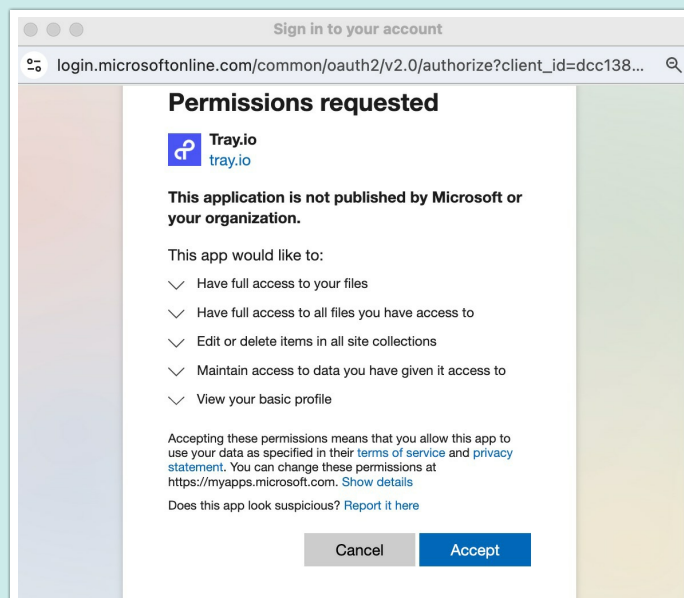
Next

4. Name your new authentication and click "create".

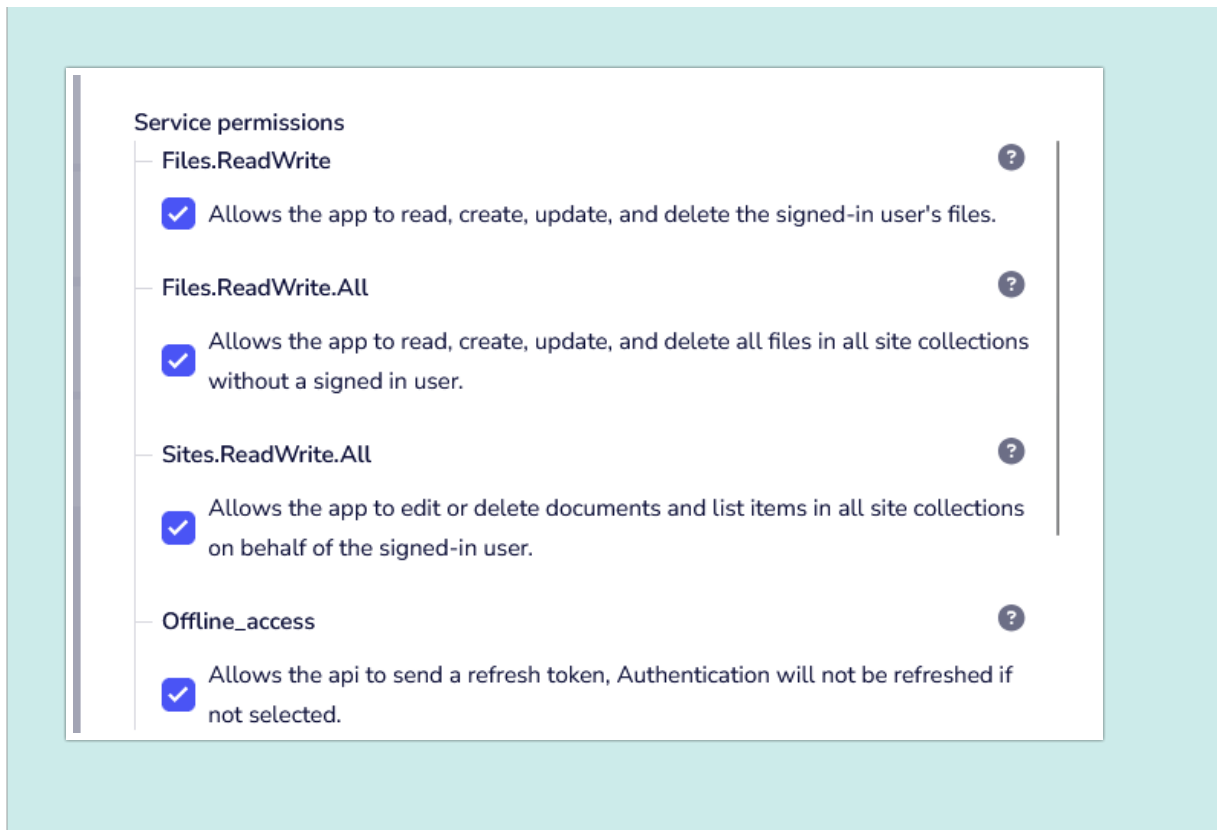


5. In the sign-in window that appears input your Microsoft 365 credentials. Once complete, return to the setup wizard in Alchemer.

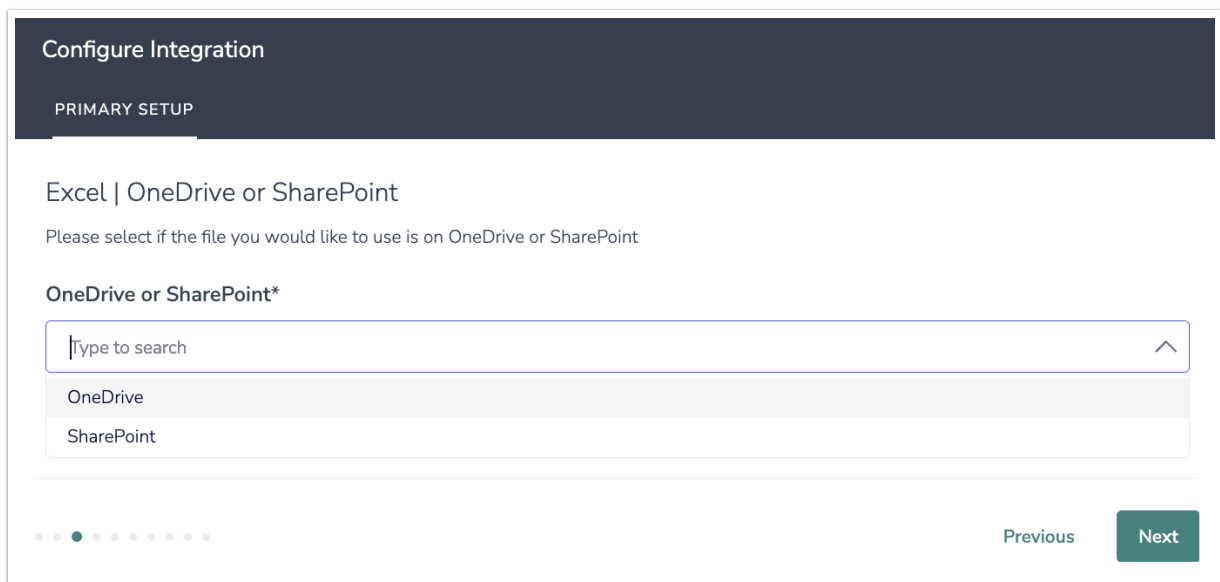
After signing in you will need to grant Alchemer (Tray.io) access to Microsoft 365.



You will need the following permissions:



6. Please select if the file you would like to use is on OneDrive or SharePoint.



7. Please enter the folder path where your Excel workbook is located.

### Configure Integration

PRIMARY SETUP

#### Excel | Folder path

Please enter the folder path where your Excel workbook is located.

Example:  
/MyFolder/MySubFolder

**Folder path\***

- Use / for the root folder
- Do not include the file name or extension
- Do not include "Shared Documents"
- Separate each folder with a slash

Progress: 1 of 4 steps (1st step active)

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

8. Choose the Excel workbook that you would like to use to insert data into.

### Configure Action

PRIMARY SETUP LOGIC ADVANCED

#### Excel | Choose Workbook

Choose the Excel workbook that you would like to use to insert data into.

**Select Workbook\***

Progress: 1 of 4 steps (1st step active)

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

9. Choose the Excel worksheet that you would like to use to insert data into.

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## Configure Action

PRIMARY SETUP LOGIC ADVANCED

### Excel | Choose Worksheet

Choose the Excel worksheet that you would like to use to insert data into.

Select Worksheet\*



Previous

Next

10. Choose the Excel table that you would like to use to insert data into.

You will need to create a table in your Excel sheet. You can create this by navigating to insert > Table in Excel. [learn more.](#)

## Configure Integration

PRIMARY SETUP

### Excel | Choose table

Choose the Excel table that you would like to pull data from.

Select table\*

You will need to create a Table in your Excel sheet. You can create this by navigating to Insert > Table in Excel, [learn more.](#)



Previous

Next

11. Select the fields in this workflow that contain the values you want to use to add a new row in Excel.

### Configure Integration

PRIMARY SETUP

#### Excel | Find row

Choose the fields in your workflow that you would like to use to find the specific Excel row.

*Please choose one:*

Use this Alchemer field to match this Excel field

Step 0 | Survey Listener Questions - Customer Satisfact... ▼

F | Industry ▼ 🗑️

Add a new mapping

**Input Data Type\***

String ▼

- Choose the data type of the column you select for the input
- Choose a unique field to query on as this only supports a single field
- This will get the first match found

---

Progress: 10 dots, 10th dot active

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

12. Click "Save" to complete the integration setup.

### Configure Integration

PRIMARY SETUP

#### Excel | 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 row was successfully added.  
400: The external integration returned an error.

---

Progress: 10 dots, 10th dot 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.

## FAQs

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

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

Related Articles