# 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.

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-	BUILD TEST MONITOR	
/≅ ∧	Activate D B O In Progress	Settings Publish
ſ	0	📕 Steps
	Workflow Timeline	Q Search for Steps
₹IJ)		Connections
—	0 🚺 Initiate Workflow	Gladly
ŝ	Survey Listener	Microsoft Office 365
0	Survey Name: Customer Satisfaction Survey	📫 Microsoft Teams
8		Salesforce Pull
Ç	€ Click to Add a Step or Drag a Step	Salesforce Push
-	$\checkmark$	🕂 Slack
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3. Click the pencil icon to configure your Excel integration step.

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- 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 per	form.		
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.

Configure Action			
PRIMARY SETUP LOGIC AD	VANCED		
< Back			
Select Action Select the action you would like to pe	form.		
Excel   Push data to Excel Push data to an Excel Worksheet	Excel   Update data in Excel Update an Excel worksheet	Excel   Get data from Excel Get data from an Excel worksheet	

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

Configure Integration		
PRIMARY SETUP		
Excel   Push data to Excel Add a row to an Excel table in OneDrive or Sharepoint		
<ul> <li>You will need:</li> <li>Your Office 365 login information</li> <li>Fields in this survey that contain information used to find the Excel table</li> <li>Fields in this survey that will contain information used to add data to the Excel table</li> <li>A table in your Excel worksheet</li> </ul>		
Need help? <u>Learn more</u> v250604		
• • • • • • • • •	Previous	Next

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.		
MICOLIC TIONES C 731671 T 205770511 (Mice 201 account)	^	]
Add a new account		
Pr	evious	Next

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

Configure A	ction			
PRIMARY SET	UP LOGIC ADVANCED			
Excel   Aut	hentication			
Connect to ya	reate a new authentication		×	
Office3 PROD	our authentication name			✓ …
You will be di	Type authentication name			
Y	ou need to type the authentication name to be able to continue.			
		Previous	Create	
• • • • • • •			Previous	Next

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.



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*		
Type to search		^
OneDrive		
SharePoint		
0 0 <b>0</b> 0 0 0 0 0 0	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*		
1		
- Use / for the root folder		
- Do not include the file name or extension		
- Do not include "Shared Documents"		
- Separate each folder with a slash		
· · · • • · · · ·	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	$\sim$
Prev	ious 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		$\sim$
	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	$\sim$
You will need to create a Table in your Excel sheet. You can create this by navigating to Insert > Table in Excel, <u>learn more.</u>	
Previo	us 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	~	Í.
Add a new mapping			
Data prep options*			
Strip HTML tags from inputs			$\sim$
• • • • • • • •		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.

Configure Integration	
PRIMARY SETUP	
Excel   Update data in Excel	1
Update a row in an Excel worksheet	I
You will need:	I
Your Office 365 login information	
Fields in this survey that contain information used to find the Excel row	
Fields in this survey that will contain information to update the Excel row	I
Need help? Learn more	
• • • • • • • • • •	Previous Next

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.		
MICOLIC TIONES C 731671 T 205770511 (Mice 201 account)	^	]
Add a new account		
Pr	evious	Next

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

Configure A	ction			
PRIMARY SET	UP LOGIC ADVANCED			
Excel   Aut	hentication			
Connect to ya	reate a new authentication		×	
Office3 PROD	our authentication name			✓ …
You will be di	Type authentication name			
Y	ou need to type the authentication name to be able to continue.			
		Previous	Create	
• • • • • • •			Previous	Next

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.



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*		
Type to search OneDrive		^
SharePoint		
· · • • · · · · · · ·	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*	
1	
- Use / for the root folder	
- Do not include the file name or extension	
- Do not include "Shared Documents"	
- Separate each folder with a slash	
0 0 0 <b>0</b> 0 0 0 0 0 0	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		$\sim$
•••	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		$\sim$
· · · • • • · · ·	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.



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 fi	nd 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			$\sim$
<ul> <li>Choose the data type of the column you select for the input</li> <li>Choose a unique field to query on as this only supports a sing</li> <li>This will update the first match found</li> </ul>	jle field		
• • • • • • • • •		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 up	idate 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			$\sim$
• • • • • • • • • •		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"

Configure Integration		
PRIMARY SETUP		
<b>&lt;</b> Back		
Select Action		
Select the action you would like to perform.		
<b>Excel   Get data from Excel</b> Get data from an Excel worksheet in OneDrive or SharePoint	<b>Excel   Update data in Excel</b> Update an Excel worksheet in OneDrive or SharePoint	<b>Excel   Push data to Excel</b> Push data to an Excel table in SharePoint or OneDrive

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



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".

Configure Action		
PRIMARY SETUP LOGIC ADVANCED		
Excel   Authentication		
Connect to yc Create a new authentication	×	····
You will be di You need to type the authentication name to be able to continue.		
	Previous Create	
• • • • • •	Previous	Next

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

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Cancel Accept	Cancel Accept	Cancel Accept	Does this app look suspicious? Report it here	
eed the following permissions:	need the following permissions:	need the following permissions:	Cancel Accept	
			eed the following permissions:	

Files.ReadWrite	?
Allows the app to read, create, update, and delete the signed-in user's file	es.
Files.ReadWrite.All	?
<ul> <li>Allows the app to read, create, update, and delete all files in all site colleg without a signed in user.</li> </ul>	ctions
Sites.ReadWrite.All	?
Allows the app to edit or delete documents and list items in all site collect on behalf of the signed-in user.	tions
Offline_access	?
Allows the api to send a refresh token, Authentication will not be refresh not selected.	ed if

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*	
Type to search	/
Type to search OneDrive	^
Type to search OneDrive SharePoint	~
Type to search OneDrive 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		
	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	$\checkmark$
Prev	vious 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.	
Sheet1	$\checkmark$
	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*	
Case_Studies	$\sim$
You will need to create a Table in your Excel sheet. You can create this by navigating to Insert > Table in Excel, <mark>learn more.</mark>	
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 fi	nd 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		$\sim$	/
Choose the data type of the column you select for the input			
Choose a unique field to query on as this only supports a sing	jle field		
I his will get the first match found			
• • • • • • •	Previous	Nex	t

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

Configure Integration		
PRIMARY SETUP		
Excel   Setup complete		
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.

# 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**