

# 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

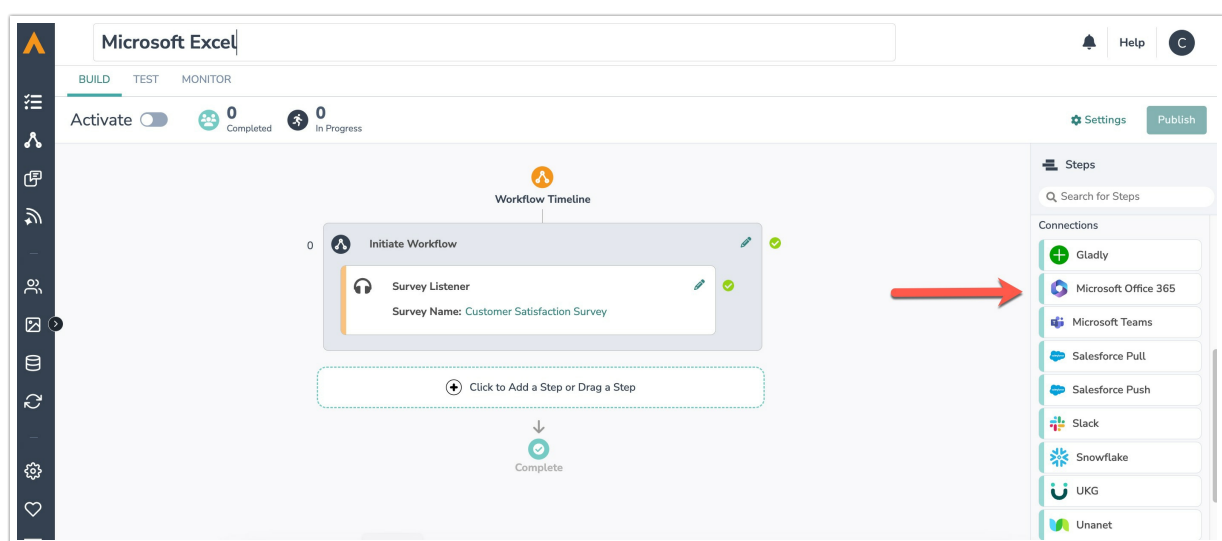
## Adding a Excel Step to your Workflow

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.

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 from 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 SETUPLOGICADVANCED

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Select Action

Select the action you would like to perform.

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

Push data to an Excel worksheet.

**You will need:**

- To authenticate with Office365
- Fields in this workflow that contain the data you want to use to insert data into your worksheet.

Need help? [Learn more](#)

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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.

 PRODUCTION\SUBJECTS\713087708\ 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 your Office365 account.

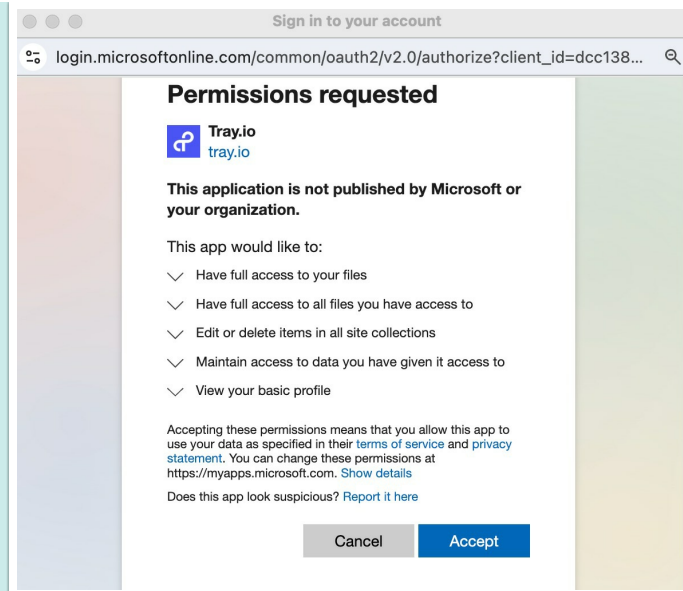
 PRODUCTION\SUBJECTS\713087708\ Office365 account ^ ...

[Add a new account](#)

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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:

Service permissions

Files.ReadWrite

☒ Allows the app to read, create, update, and delete the signed-in user's files.

?

Files.ReadWrite.All

☒ Allows the app to read, create, update, and delete all files in all site collections without a signed in user.

?

Sites.ReadWrite.All

☒ Allows the app to edit or delete documents and list items in all site collections on behalf of the signed-in user.

?

Offline\_access

☒ Allows the api to send a refresh token, Authentication will not be refreshed if not selected.

?

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

Configure Action

PRIMARY SETUPLOGICADVANCED

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

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

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | Choose Worksheet

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

Select Worksheet\*

Sheet1

PreviousNext

8. 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 row

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 Satisfaction Survey | ...

A | Project Tracker

Add a new mapping

9. Click "Save" to complete 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.

### 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 from 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"

Configure Integration

PRIMARY SETUP

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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

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

Configure Integration

PRIMARY SETUP

Excel | Update data in Excel

Update a row in an Excel worksheet

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

Need help? [Learn more](#)

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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.

 PRODUCTION\JULIUS@PTL710877086\ 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 your Office365 account.

 PRODUCTION\JULIUS@PTL710877086\ Office365 account ^ ...

You will be directed to the Microsoft 365 sign-in page.

**Create a new authentication** X

Your authentication name

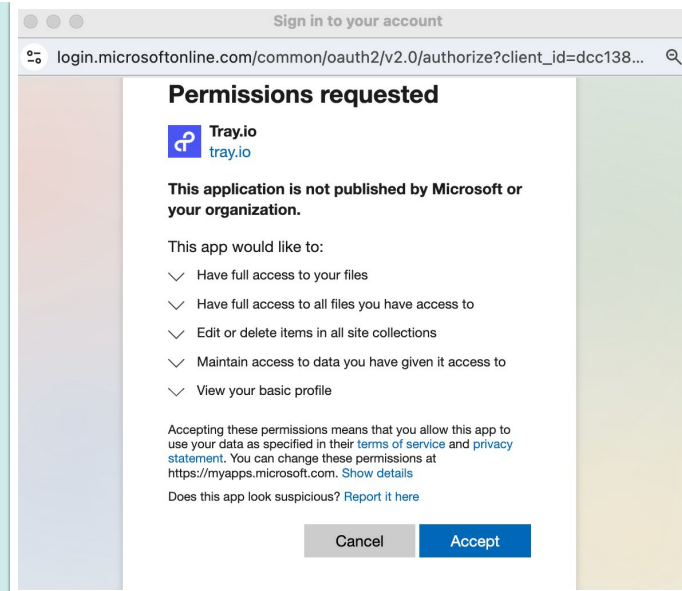
You need to type the authentication name to be able to continue.

Previous **Create**

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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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Sites.ReadWrite.All

☒ Allows the app to edit or delete documents and list items in all site collections on behalf of the signed-in user.

?

Offline\_access

☒ Allows the api to send a refresh token, Authentication will not be refreshed if not selected.

?

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

Configure Action

PRIMARY SETUPLOGICADVANCED

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

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

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | Choose Worksheet

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

Select Worksheet\*

Sheet1

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8. Choose the fields in your workflow that you would like to use to find the specific Excel row to use for the update. Then choose the data type of the column you select for the input

This will update the first match found.

Choose a unique field to query on as this only supports a single field

### 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 Satisfaction Survey | ...

B |

Add a new mapping

**Input Data Type\***

String

Previous

Next

9. 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 Satisfaction Survey | ...

C |

Add a new mapping

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10. Click "Save" to complete 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: Successfully updated Excel row.

202: Failed to get Excel row.

400: The external integration returned an error.

#### 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 to 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 to Excel"

Configure Integration

PRIMARY SETUP

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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

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](#)

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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.

 PRODUCTION\SUBJECTS\713087708\ Office365 account ^ ...

[Add a new account](#)

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

**Configure Action**

PRIMARY SETUP LOGIC ADVANCED

### Excel | Authentication

Connect to your Office365 account.

 PRODUCTION\SUBJECTS\713087708\ Office365 account ^ ...

You will be directed to the Microsoft 365 sign-in page.

**Create a new authentication** X

Your authentication name

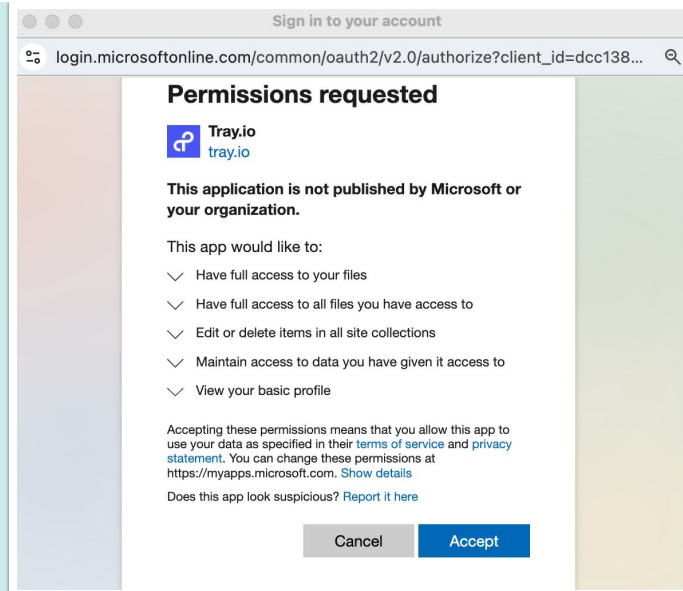
You need to type the authentication name to be able to continue.

Previous Create

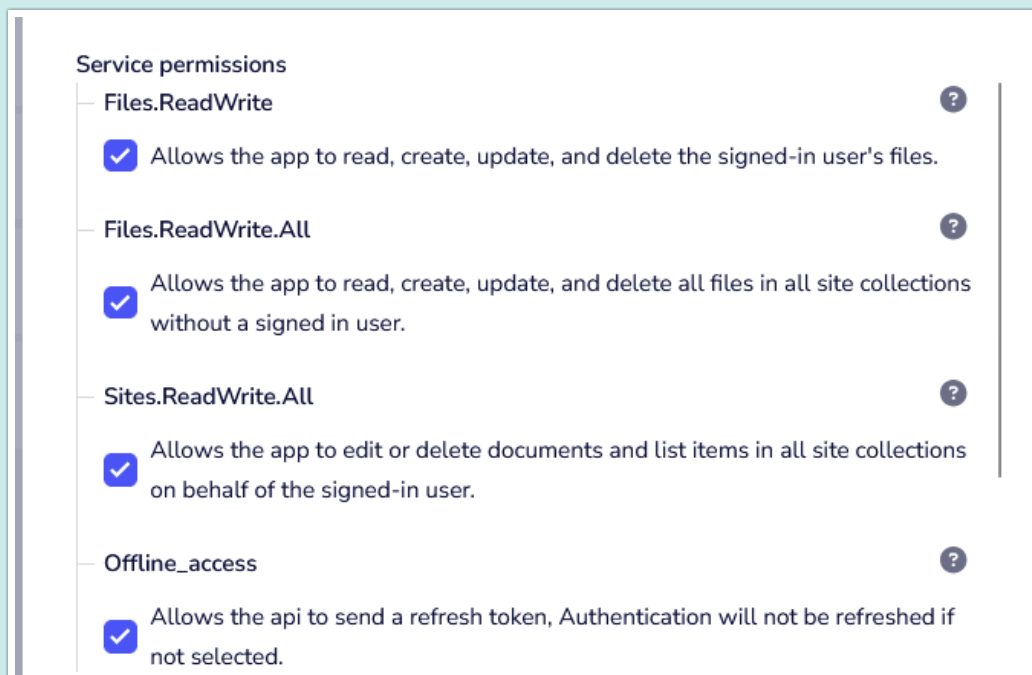
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5. In the sign-in window that appears input your Microsoft 365 credentials. Once complete, return to the setup wizard in Alchemer.

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



You will need the following permissions:



6. Choose the Excel workbook that you would like to pull data from.
7. Select the worksheet that you would like to pull data from.
8. Choose the fields in your workflow that you would like to use to find the specific Excel row to use for the update. Then choose the data type of the column you select for the input

This will update the first match found.



Choose a unique field to query on as this only supports a single field

9. Click "Save" to complete 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: Successfully pulled Excel row.

202: Failed to get Excel row.

400: The external integration returned an error.

### 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