

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

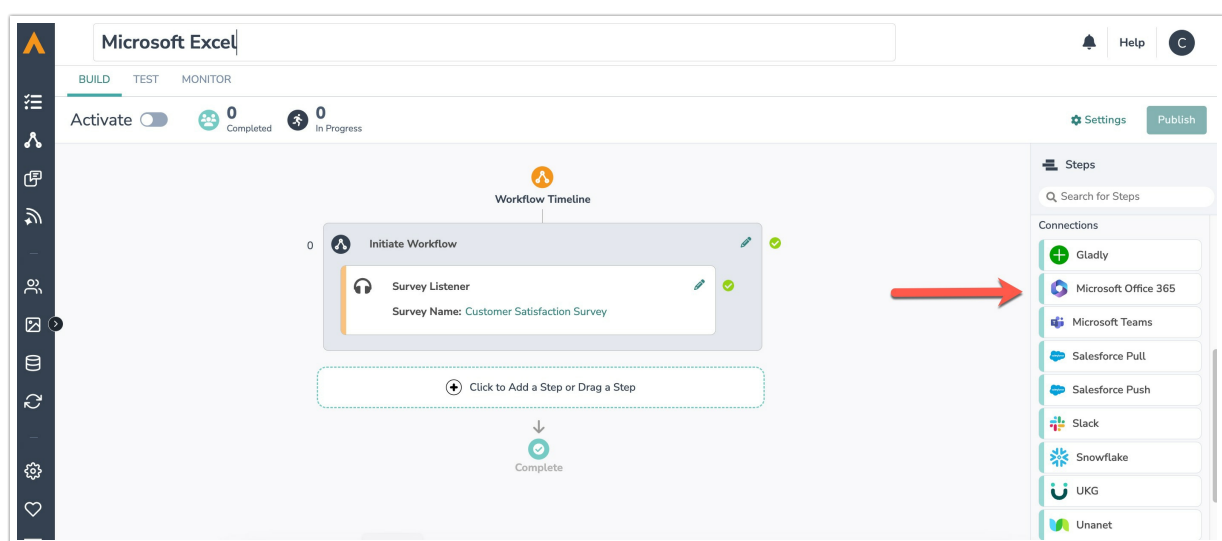
Adding a Excel Step to your Workflow

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 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 SETUPLOGICADVANCED

[< Back](#)

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

Add a row to an Excel table in OneDrive or Sharepoint

You will need:

- Your Office 365 login information
- Fields in this survey that contain information used to find the Excel table
- Fields in this survey that will contain information used to add data to the Excel table
- A table in your Excel worksheet

Need help? [Learn more](#)

v250604

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

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | Authentication

Connect to your Office365 account.

 PRODUCTION\SUBJECTS\T1087708\> Office365 account

...

[Add a new account](#)

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

Configure Action

PRIMARY SETUPLOGICADVANCED

Excel | Authentication

Connect to your Office365 account.

 PRODUCTION\SUBJECTS\T1087708\> Office365 account

...

[Add a new account](#)

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Create a new authentication

Your authentication name

Type authentication name

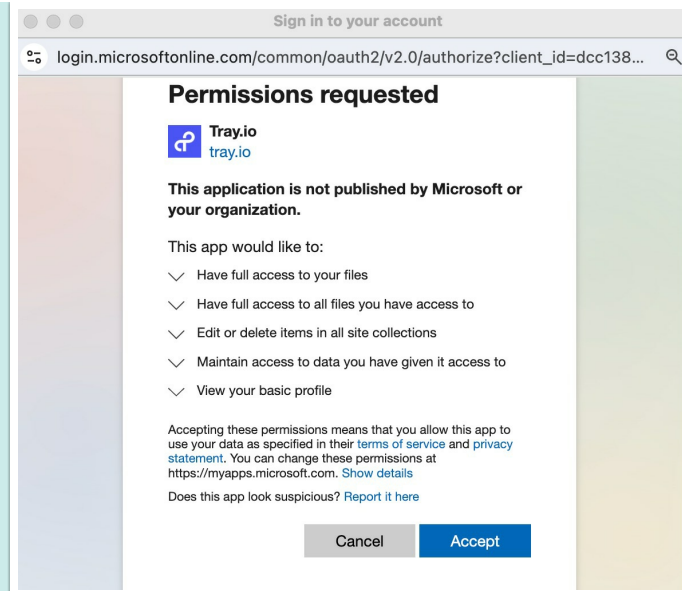
You need to type the authentication name to be able to continue.

Previous

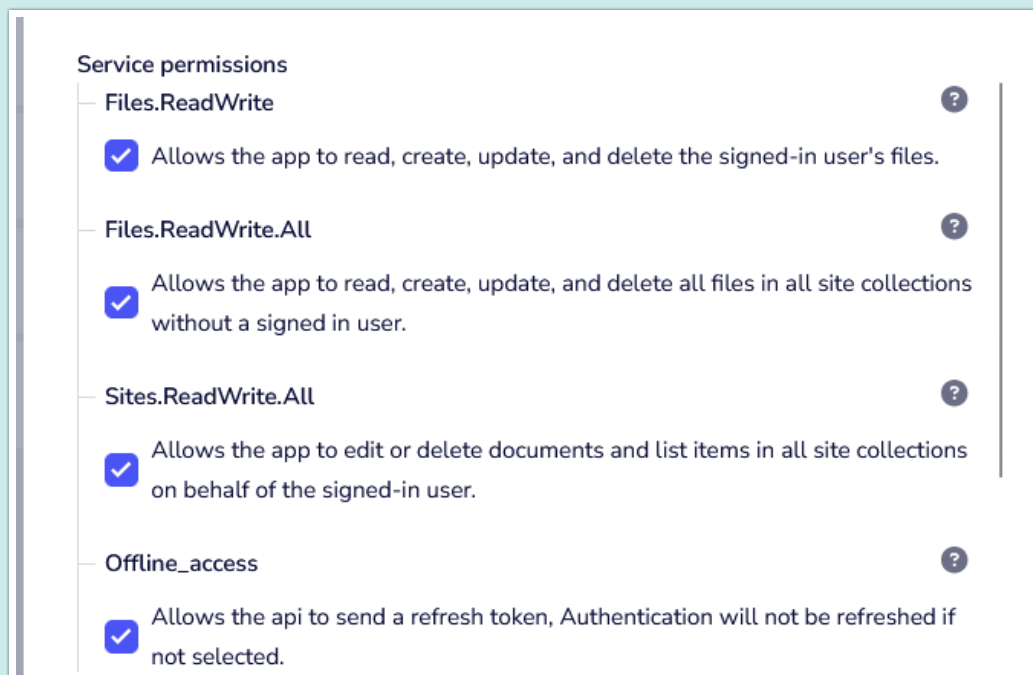
Create

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*

Type to search

OneDrive

SharePoint

PreviousNext

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

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8. 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

PreviousNext

9. 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

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](#).

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[Next](#)

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

Excel. 

12. Click "Save" to complete the integration setup

[illegible]

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"

The screenshot shows a 'Configure Integration' screen with a dark header. Below the header, there's a 'PRIMARY SETUP' section. A 'Back' button is visible. The main area is titled 'Select Action' with the instruction 'Select the action you would like to perform.' There are three action cards: '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), and 'Excel | Push data to Excel' (Push data to an Excel table in SharePoint or OneDrive). The 'Excel | Update data in Excel' card is highlighted. At the bottom right, there are 'Cancel' and 'Next' buttons.

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 survey that will contain information to update 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

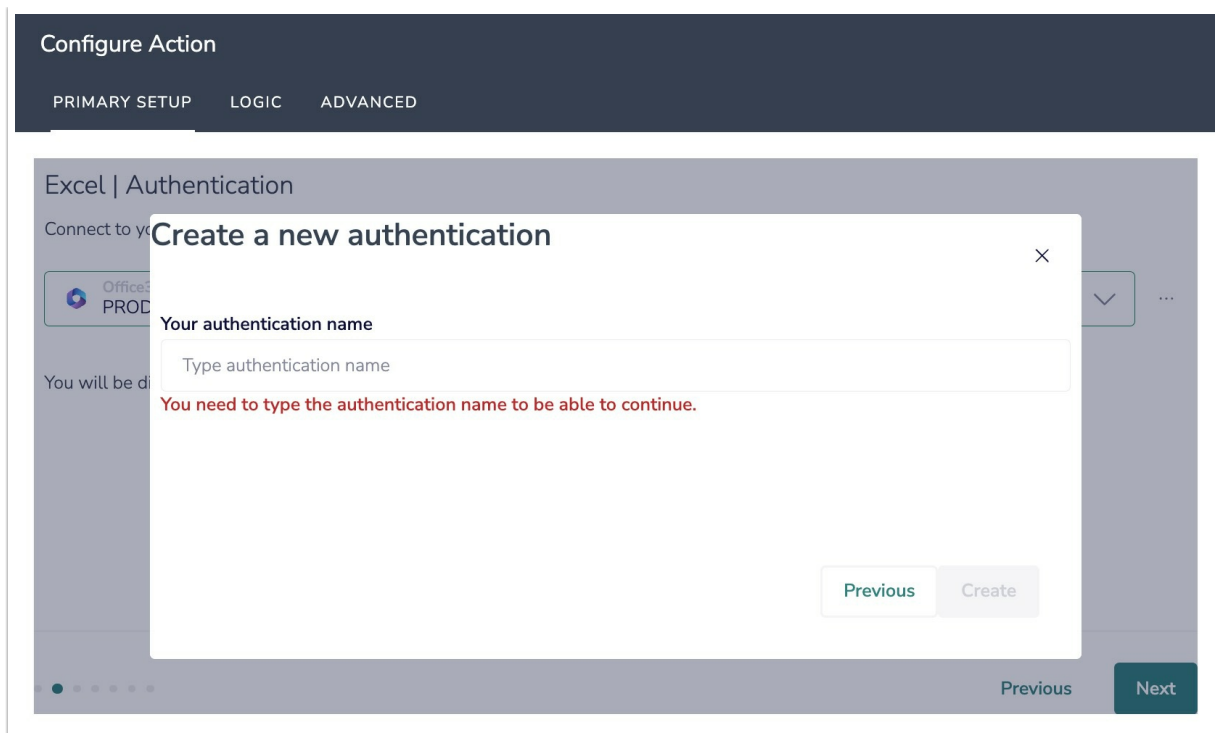
Connect to your Office365 account.

© 2025 Microsoft Corporation. All rights reserved. [Privacy](#) [Terms](#) [Feedback](#)

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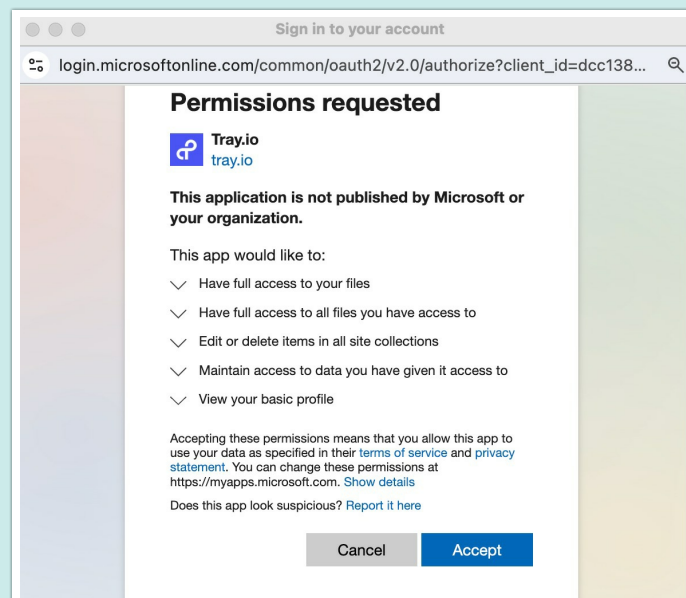
Next

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:

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. 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

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

8. 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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9. 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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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.

[illegible]

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



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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 the 'Configure Integration' interface. At the top, there's a dark header with the title 'Configure Integration' and a sub-header 'PRIMARY SETUP'. Below the header, there's a 'Back' button with a left arrow. The main section is titled 'Select Action' and contains the instruction 'Select the action you would like to perform.' Below this instruction, there are three action cards. The first card, 'Excel | Get data from Excel', is highlighted with a light blue background and contains the text 'Get data from an Excel worksheet in OneDrive or SharePoint'. The second card, 'Excel | Update data in Excel', has a white background and contains the text 'Update an Excel worksheet in OneDrive or SharePoint'. The third card, 'Excel | Push data to Excel', also has a white background and contains the text '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 SETUPLOGICADVANCED

Excel | Authentication

Connect to your Office365 account.



PRODUCERACTIVITY123456789's Office 365 account

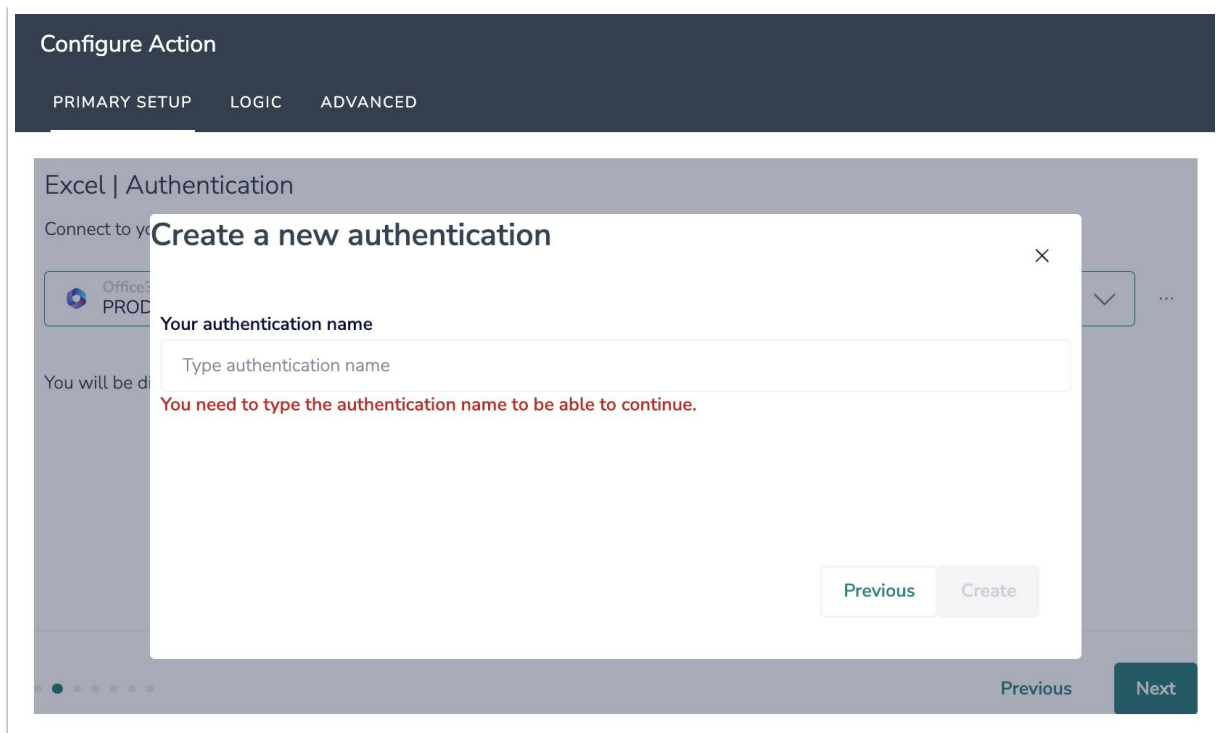
^

...

[Add a new account](#)

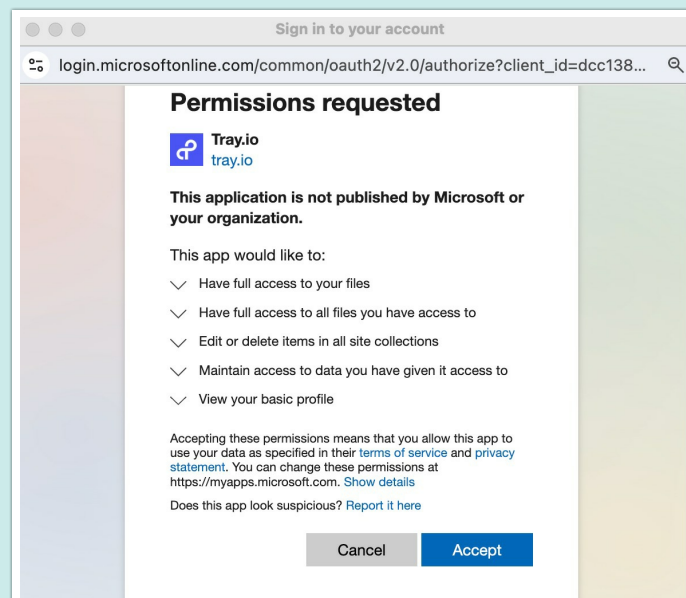
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4. Name your new authentication and click "create".



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:

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. 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

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

 8. 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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9. 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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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

▼

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

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

[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.

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