

HubSpot Integration for Alchemer Survey

The Alchemer HubSpot Integration is available as an add-on and only available to customers in enterprise plans. If you are interested in purchasing the HubSpot Integration, please [contact us](#) for additional information.

This document is for the **new** HubSpot integration. You will find this integration under "Your Integrations" in the Add Action modal.

With the Alchemer HubSpot integration you can easily:

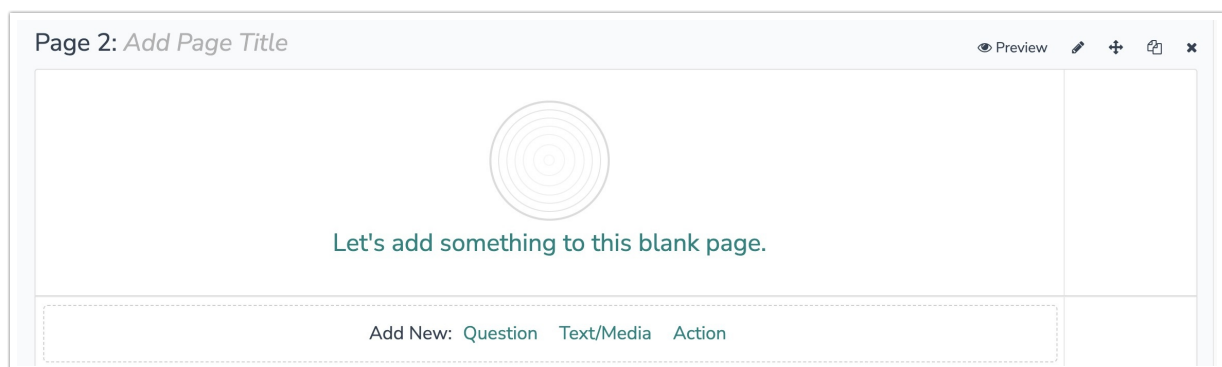
- Use survey data to update a HubSpot record
- Use survey data to create a HubSpot record
- Pull a record from HubSpot into Alchemer Survey

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 one of your purchased integrations.

HubSpot | Update Record

You will need:

- To authenticate with HubSpot
- Fields in this survey used to find the record to update
- Fields in this survey used to update the record

1. Select the "Update record" action.

Configure Action

PRIMARY SETUPLOGICADVANCED

< Back

Select Action

Select the action you would like to perform.

Update record
Update a record in HubSpot

Get record
Get a record from HubSpot

Create record
Create a record in HubSpot

Cancel

Next

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

Configure Action

PRIMARY SETUPLOGICADVANCED

HubSpot | Update record

Update a record within a HubSpot object

You will need:

- To authenticate with HubSpot
- Fields in this survey used to find the record to update
- Fields in this survey used to update the record

Need help? [Learn more](#)

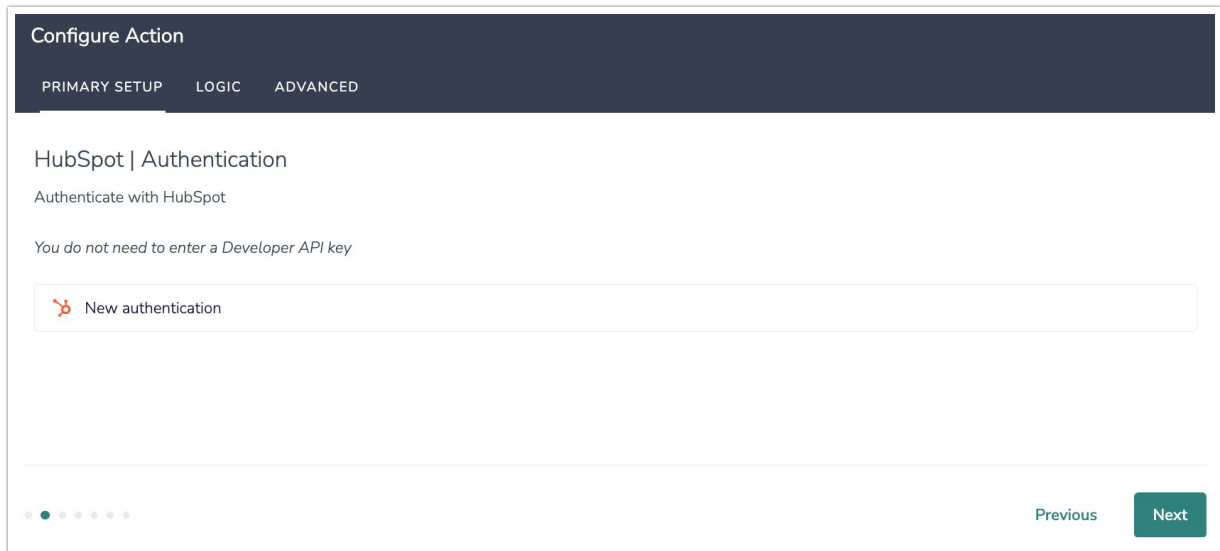
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Previous

Next

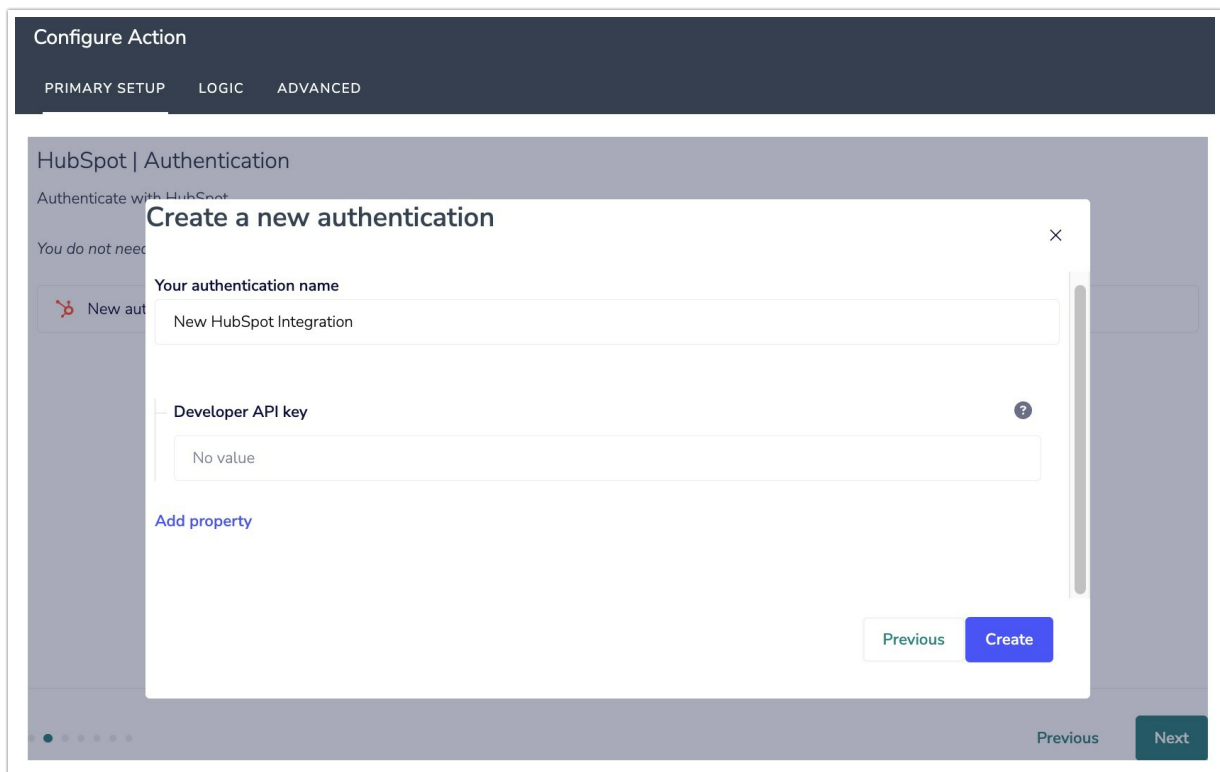
3. Authenticate with your HubSpot account.

You do not need to enter a Developer API key. It is only required for marketing app operations.



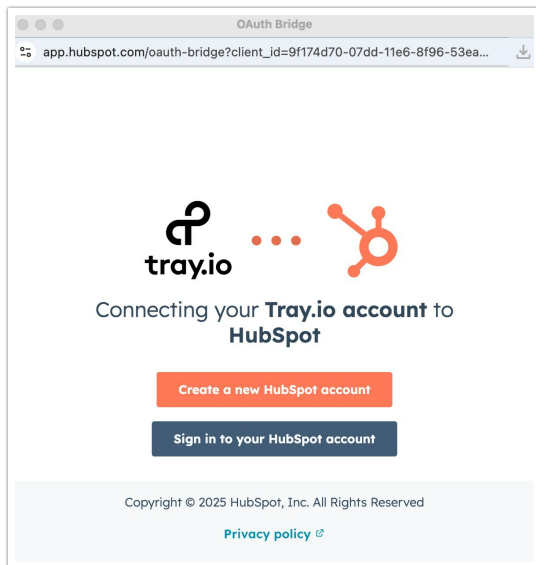
The screenshot shows the 'Configure Action' interface for HubSpot authentication. The top navigation bar includes 'PRIMARY SETUP', 'LOGIC', and 'ADVANCED'. The main heading is 'HubSpot | Authentication', followed by the sub-heading 'Authenticate with HubSpot'. A note states: 'You do not need to enter a Developer API key'. Below this is a large text input field containing the text 'New authentication' with a HubSpot logo icon. At the bottom right, there are 'Previous' and 'Next' buttons. A progress indicator at the bottom left shows five dots, with the first dot being filled.

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

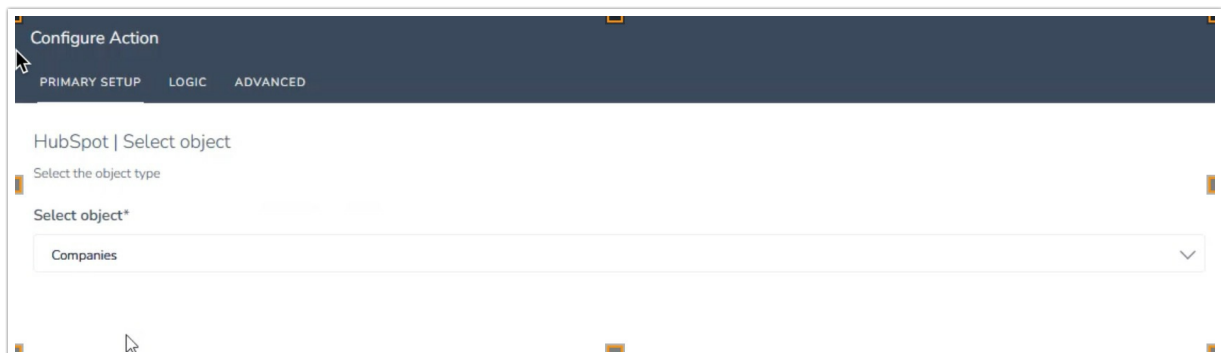


The screenshot shows the 'Create a new authentication' modal dialog overlaid on the 'Configure Action' page. The modal has a title bar with a close button (X). It contains two input fields: 'Your authentication name' with the value 'New HubSpot Integration', and 'Developer API key' with the value 'No value'. A question mark icon is next to the 'Developer API key' field. Below the fields is a link that says 'Add property'. At the bottom right of the modal are 'Previous' and 'Create' buttons. The background page is dimmed, showing the same 'Configure Action' interface as the previous screenshot.

5. Sign into your HubSpot account and connect Tray.io (Alchemer) with to your HubSpot account.



6. Select the HubSpot Object that you would like to update records for.



7. Select the fields in this survey that contain the values that you want to use to find the specific record.

If you select more than one field they are combined with the *and* operator

Configure Action

PRIMARY SETUP

LOGIC

ADVANCED

HubSpot | Find record

Select the fields in this survey that contain the values you want to use to find the specific record

If you select more than one field they are combined with the and operator

Use this Alchemer field value

to match this HubSpot field

Question | 1. Input (id: 2)

HubSpot | Email

Add a new mapping

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.

8. Select the fields in this survey that contain the values you want to use to update the specific record in HubSpot.

Configure Action

PRIMARY SETUP

LOGIC

ADVANCED

HubSpot | Update record

Select the fields in this survey that contain the values you want to use to update the record

Use this Alchemer field value

to update this HubSpot field

Question | 3. Update (id: 4)

HubSpot | City

Add a new mapping

9. Select any fields that you want to get back.

Data about the action is available for use in your survey. You can map this data back to fields in Alchemer.

For example, if there is an error in the action you can skip the rest of the survey questions for that respondent.

Configure Action

PRIMARY SETUPLOGICADVANCED

HubSpot | Get data back

Select the fields you want to get back.

Use this HubSpot field

To update this Alchemer survey field

Action | Metadata | message

Question | 4. Output (id: 3)

Add a new mapping

10. Click "Save" to complete the integration action.

Configure Action

PRIMARY SETUPLOGICADVANCED

HubSpot | 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: Record was successfully updated.

202: Multiple records were found. Please update your query to select unique fields.

400: The external integration returned an error.

HubSpot | Get Record

You will need:

- To authenticate with HubSpot
- Fields in this survey used to find the record
- Fields in this survey used to get data back about the record

1. Select the "Get Record" integration action.

Configure Action

PRIMARY SETUPLOGICADVANCED

< Back

Select Action

Select the action you would like to perform.

Update record

Update a record in HubSpot

Get record

Get a record from HubSpot

Create record

Create a record in HubSpot

Cancel

Next

2. Click "Next" on the integration overview.

Configure Action

PRIMARY SETUPLOGICADVANCED

HubSpot | Get record

Get a record from a HubSpot object

You will need:

- To authenticate with HubSpot
- Fields in this survey used to find the record
- Fields in this survey used to get data back about the record

Need help? [Learn more](#)

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3. Authenticate with your HubSpot account.

You do not need to enter a Developer API key. It is only required for marketing app operations.

Configure Action

PRIMARY SETUPLOGICADVANCED

HubSpot | Authentication

Authenticate with HubSpot

You do not need to enter a Developer API key

New authentication

PreviousNext

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

Configure Action

PRIMARY SETUPLOGICADVANCED

HubSpot | Authentication

Authenticate with HubSpot

You do not need

New authentication

Create a new authentication

Your authentication name

New HubSpot Integration

Developer API key

No value

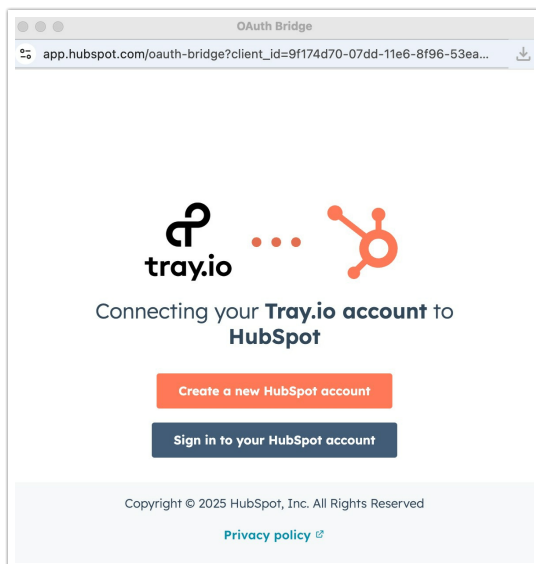
Add property

Previous

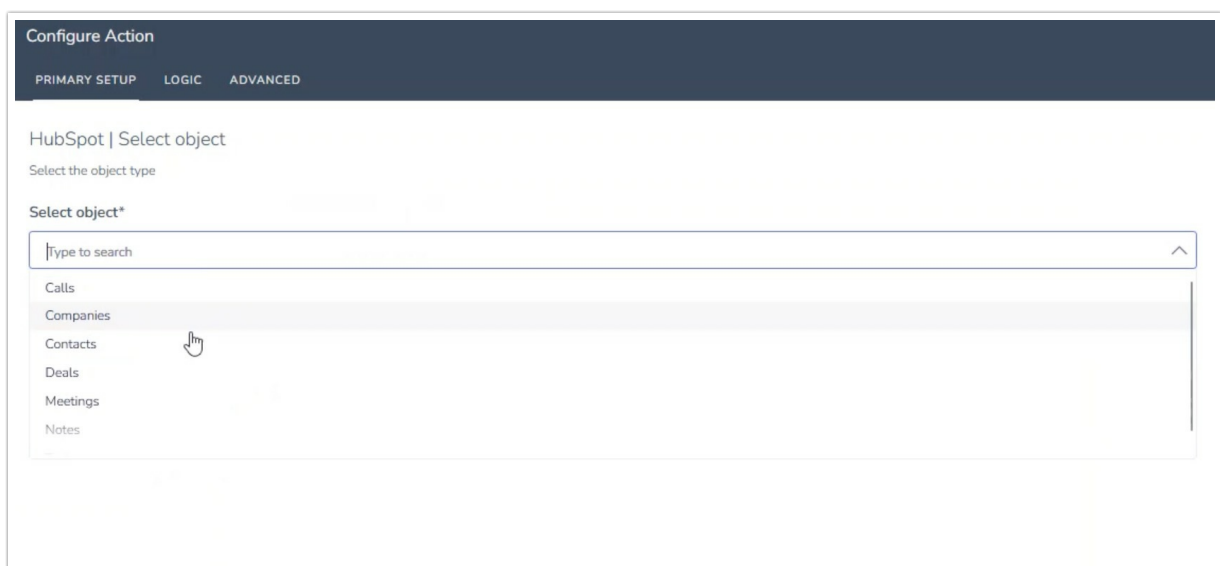
Create

PreviousNext

5. Sign into your HubSpot account and connect Tray.io (Alchemer) with to your HubSpot account.



6. Select the HubSpot Object that you would like to update records for.



7. Select the fields in this survey that contain the values you want to use to find the specific record within that object.

Configure Action
PRIMARY SETUP
LOGIC
ADVANCED

HubSpot | Find record

Select the fields in this survey that contain the values you want to use to find the specific record

If you select more than one field they are combined with the and operator

Use this Alchemer field value

to match this HubSpot field

Question | 1. Input 1 (id: 2)

HubSpot | Email

Question | 2. Input 2 (id: 3)

HubSpot | First Name

Add a new mapping

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.

8. Select the fields you want to get back for use in your survey.

Configure Action
PRIMARY SETUP
LOGIC
ADVANCED

HubSpot | Get data back

Select the fields you want to get back

Use this HubSpot field

To update this Alchemer survey field

Action | Metadata | message

Question | 3. Message (id: 8)

HubSpot | Id

Question | 4. Output 1 (id: 4)

HubSpot | Email

Choose an option

Add a new mapping

9. Click "Save" to complete your integration action.

Configure Action

PRIMARY SETUPLOGICADVANCED

HubSpot | 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: Query ran successfully, but no records were found
202: More than one record was found. The first record is used for the values returned to Alchemer
400: The external integration returned an error

HubSpot | Create Record

You will need:

- To authenticate with HubSpot
- Fields in this survey used to create the record

1. Select the "Create Record" integration action.

Configure Action

PRIMARY SETUPLOGICADVANCED

< Back

Select Action

Select the action you would like to perform.

Update record
Update a record in HubSpot

Get record
Get a record from HubSpot

Create record
Create a record in HubSpot

Cancel

Next

2. Click "Next" on the integration overview.

Configure Action

PRIMARY SETUPLOGICADVANCED

HubSpot | Create record

Create a record within a HubSpot object

You will need:

- To authenticate with HubSpot
- Fields in this survey used to create the record

Need help? [Learn more](#)

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3. Authenticate with your HubSpot account.

You do not need to enter a Developer API key. It is only required for marketing app operations.


Configure Action

PRIMARY SETUPLOGICADVANCED

HubSpot | Authentication

Authenticate with HubSpot

You do not need to enter a Developer API key

 New authentication

PreviousNext

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


Configure Action

PRIMARY SETUP LOGIC ADVANCED

HubSpot | Authentication

Authenticate with HubSpot

You do not need to create a new authentication

 New authentication

Create a new authentication

Your authentication name

New HubSpot Integration

Developer API key

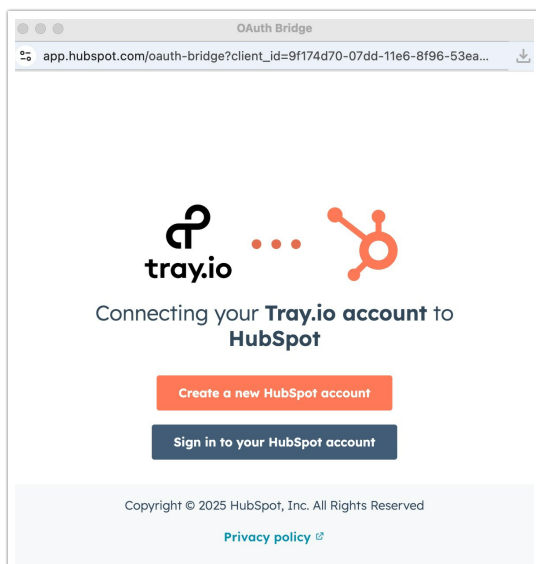
No value

[Add property](#)

[Previous](#) [Create](#)

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

5. Sign into your HubSpot account and connect Tray.io (Alchemer) with to your HubSpot account.



6. Select the HubSpot Object that you would like to create a records for.

Configure Action

PRIMARY SETUP LOGIC ADVANCED

HubSpot | Select object

Select the object type

Select object*

Type to search

- Calls
- Companies
- Contacts
- Deals
- Meetings
- Notes

7. Select the fields in this survey that contain the values you want to use to create the record

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.

Configure Action

PRIMARY SETUP LOGIC ADVANCED

HubSpot | Create record

Select the fields in this survey that contain the values you want to use to create the record

Use this Alchemer field value to update this HubSpot field

Question | 1. Input 1 (id: 2) HubSpot | First Name

Add a new mapping

8. Select any fields that you want to get back.

Data about the action is available for use in your survey. You can map this data back to fields in Alchemer.

For example, if there is an error in the action you can skip the rest of the survey questions for that respondent.

Configure Action

PRIMARY SETUP LOGIC ADVANCED

HubSpot | Get data back

Select the fields you want to get back.

Use this HubSpot field

To update this Alchemer survey field

Action Metadata message	Question 3. Message (id: 8)
HubSpot Id	Question 4. Output 1 (id: 4)

Add a new mapping

9. Click "Save" to complete setup.

Configure Action

PRIMARY SETUP LOGIC ADVANCED

HubSpot | 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: Record was successfully created.

400: The external integration returned an error.

Monitoring a HubSpot 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 HubSpot integration?
- This integration doesn't fit my use cases, or I want to provide feedback to Alchemer!

Related Articles