Salesforce Structured Response for Alchemer Survey

Overview

Salesforce is a cloud-based customer relationship management (CRM) platform used by organizations to manage customer data, sales processes, and business relationships.

The Alchemer Salesforce Structured Response integration allows Alchemer to push survey response data into Salesforce using a structured, normalized data model. This integration is designed to capture detailed survey responses, question metadata, and respondent context in Salesforce for reporting, analytics, and downstream automation.

Common uses for the Alchemer Salesforce Structured Response integration

- Store detailed survey responses in Salesforce using a structured data model
- Link survey responses to Salesforce records such as Contacts, Leads, or custom objects
- Enable advanced reporting and analytics on survey data in Salesforce
- Trigger Salesforce automation based on structured survey response data
- Reduce custom mapping by using a standardized response schema

What can the Alchemer Salesforce Structured Response integration do?

- Push structured survey response records to Salesforce
- Create or update related Salesforce records for surveys, questions, and responses
- Automatically build and maintain Salesforce objects required for structured responses
- Return Salesforce metadata and status information for validation and debugging

You will need

- Salesforce API access and credentials
- Permission to create and update Salesforce objects and records
- An Alchemer plan that includes integrations and the Integration Manager permission enabled.
  - Contact us if you are unsure if your plan includes integrations.
- Create your objects using the CSV's below in the Salesforce object creator
  - schema_questions.csv 🔗
  - schema_responses.csv 🔗
  - schema_sessions.csv 🔗

Setup Alchemer Salesforce Structured Response integration in surveys

Salesforce | Structured Response

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You will need:

- Salesforce API credentials
- Permission to create custom objects and fields in Salesforce

Configure the action

1. Open your survey in **Survey builder**.

2. Select **Add New: Action**.

3. In the Add Action modal, scroll to the **Integrations** section.

4. Select **Salesforce**.

5. Select **Salesforce | Structured Response**.

6. **Salesforce | Authentication:** Select an existing authentication or create a new authentication.

7. **Salesforce | My Domain:** Enter your Salesforce My Domain. Your Salesforce My Domain is a custom, branded subdomain for your Salesforce org.

8. **Salesforce | Select objects:** Select your Salesforce objects you would like to use for the structured response. You can use the CSVs above to create the objects.

9. **Salesforce | Validating objects:** Checking if your salesforce objects are properly built before proceeding. If you receive an error, ensure you've selected the correct object, and all required fields are created.

10. **Salesforce | Select data to push:** Select the fields in this survey that contain the values you want to use to create the specific record in Salesforce.

11. **Salesforce | Pushing question data:** Pushing question metadata to Salesforce for the selected questions.

12. **Salesforce | Get data back:** Select the fields you want to get back. This is optional.

13. Save the action.

Status codes

- 200: Successfully pushed to Salesforce.
- 400: The Salesforce integration returned an error.

Testing and Troubleshooting

Testing and Validation

How to test

- Submit a survey response that triggers the Salesforce Structured Response action.
- Confirm structured response records are created in Salesforce.
- Review returned metadata for successful execution.

How to verify results

- Check Salesforce for newly created or updated structured response records.
- Ensure survey questions and responses are stored as expected.

Monitoring Integration Activity

Where to find logs

- Go to **Results → Individual Responses**.
- Select the response you want to inspect.
- Open the **Action Log** tab.

What logs display

- Success or failure status
- Timestamps
- Input and output values
- Returned status codes from Salesforce

Troubleshooting

Authentication issues

- Incorrect or expired Salesforce credentials
- Insufficient Salesforce permissions

Object or data issues

- Objects or fields could not be created
- Unexpected data formatting

API errors

- Validation errors
- Salesforce API limits or restrictions

FAQs

What permissions do I need?

Integration Manager in Alchemer and API permissions in Salesforce.

When does the integration run?

In real time when a survey response is submitted.

Can I use multiple Structured Response actions in one survey?

Yes. Structured Response actions can be combined with other Salesforce actions if needed.

Why isn't my data appearing in Salesforce?

Check the Action Log for authentication issues, object creation errors, or API limits.

What if I need additional functionality?

Contact Alchemer Support for enhancement requests.

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