

Asana Integration for Alchemer Workflow

Overview

{External Platform} is {describe what it is} used by organizations to {describe what it does}.

The Alchemer integration with {External Platform} supports {integration actions}. The Alchemer {External Platform} integration allows Alchemer to use information from {External Platform} to get data, personalize workflow paths, enrich routing logic, create merge codes, and update information in {External Platform} without manual intervention.

Common uses for the Alchemer {External Platform} integration

- Personalize emails and workflow steps with information in {External Platform}
- Use {External Platform} information in workflow logic
- Automate data retrieval and updates between Alchemer and {External Platform}
- Reduce manual data entry and record maintenance
- Keep {External Platform} records synchronized with responses collected in Alchemer
- {add any specific things}

What can the Alchemer {External Platform} integration do?

- Get {Object} data
- Update {Object}
- Upsert {Object}
- Push {Object}

You will need

- {External Platform} API access and credentials
- An Alchemer plan that includes integrations and the Integration Manager permission enabled.
 - [Contact us](#) if you are unsure if your plan includes integrations.

Setup Alchemer {External Platform} integration in workflow

{External Platform} | Get {Object A}

You will need:

- {External Platform} API credentials
- Fields containing a unique identifier for {Object A}

Configure the action

1. Open your workflow in **Workflow builder**.
2. On the right side, drag and drop the {External Platform} connection where you want the action to trigger.
3. In the connection box, click the pencil icon in the top right corner.
4. Select **{External Platform} | Get {Object A}**.
5. **{External Platform} | Authentication:** Select an existing authentication or create a new authentication.
6. **{External Platform} | Find {Object A}:** Select the Alchemer field containing the lookup value.
7. **{External Platform} | Get data back:** Select the {External Platform} {Object A} fields you want returned.
8. Save the action.

Status codes

- 200: A single row was successfully found
- 201: Query succeeded but no {Object A} were found
- 202: Multiple {Object A} were found (first returned is used)
- 400: Error returned by {External Platform} API

{External Platform} | Update {Object B}

You will need:

- {External Platform} API credentials
- Fields containing the identifier for the {Object B}

Configure the action

1. Open your workflow in **Workflow builder**.
2. On the right side, drag and drop the {External Platform} connection where you want the action to trigger.
3. In the connection box, click the pencil icon in the top right corner.
4. Select **{External Platform} | Update {Object B}**.
5. **{External Platform} | Authentication:** Select an existing authentication or create a new authentication.

6. **{External Platform} | Find {Object B}**: Select the Alchemer field containing the lookup value.
7. **{External Platform} | Update {Object B}**: Choose the Alchemer fields used to update corresponding {External Platform} {Object B} fields.
8. Save the action.

Status codes

- 200: {Object B} was successfully updated
- 400: The external integration returned an error

{External Platform} | Upsert {Object C}

You will need:

- {External Platform} API credentials
- Fields containing the identifier for the {Object C}

Configure the action

1. Open your workflow in **Workflow builder**.
2. On the right side, drag and drop the {External Platform} connection where you want the action to trigger.
3. In the connection box, click the pencil icon in the top right corner.
4. Select **{External Platform} | Upsert {Object C}**.
5. **{External Platform} | Authentication**: Select an existing authentication or create a new authentication.
6. **{External Platform} | Find {Object C}**: Select the Alchemer field containing the lookup value.
7. **{External Platform} | Upsert {Object C}**: Choose the data you want to use to upsert {Object C} in {External Platform}.
8. Save the action.

Status codes

- 200: Successfully inserted {Object C}.
- 201: Successfully updated {Object C}.
- 400: The external integration returned an error.

{External Platform} | Push {Object D}

You will need:

- {External Platform} API credentials

- Fields containing the identifier for the {Object D}

Configure the action

1. Open your workflow in **Workflow builder**.
2. On the right side, drag and drop the {External Platform} connection where you want the action to trigger.
3. In the connection box, click the pencil icon in the top right corner.
4. Select **{External Platform} | Push {Object D}**.
5. **{External Platform} | Authentication**: Select an existing authentication or create a new authentication.
6. **{External Platform} | Push {Object D}**: Select the Alchemer field with data to push to {External Platform}.
7. **{External Platform} | Get data back**: Select which {External Platform} fields to return.
8. Save the action.

Status codes

- 200: Successfully inserted {Object D}.
- 400: The external integration returned an error.

Testing and Troubleshooting

Testing and Validation

How to test

- Trigger the workflow and monitor individual runs in monitor tab in your workflow
 - Click on individual workflow runs to see metadata outputs
- Confirm the expected update or retrieval occurs in {External Platform}.
- Use metadata for verification and debugging.

How to verify results

- Check the impacted record in {External Platform}.
- Ensure retrieved or updated values match expectations.

Monitoring Integration Activity

Where to find logs

- Go to **Results** → **Monitor**
- Select a the integration step you want to inspect.

What logs display

- Input/Output

Troubleshooting

Authentication issues

- Incorrect or expired credentials
- Missing permissions in {External Platform}

Lookup failures

- Invalid identifier values
- No matching records

Mapping errors

- Unsupported or invalid fields
- Incorrect formatting

API errors

- Validation issues
- Endpoint restrictions

FAQs

What permissions do I need?

Integration Manager in Alchemer and API permissions in {External Platform}.

When does the integration run?

When the workflow triggers and reaches the integration step.

Can I use multiple {Integration Name} actions in one workflow?

Yes. Actions can work independently or together.

Why isn't my data updating?

Check the Action Log for lookup issues, mapping problems, or API errors.

What if I need additional functionality?

Contact Alchemer Support for enhancement requests.

Related Articles