Salesforce Custom Response Object 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 Custom Response Object** integration allows you to create and use a dedicated custom object in Salesforce to store complete survey response and session data. This integration pushes structured response data directly into Salesforce, enabling centralized reporting, automation, and relationship mapping.

Common uses for the Alchemer Salesforce Custom Response Object integration

- Store full survey response data in a dedicated Salesforce custom object
- Centralize reporting and dashboards within Salesforce
- Trigger Salesforce Flows, Process Builder, or Apex automation from survey responses
- Maintain historical survey response records tied to CRM data
- Eliminate manual imports or CSV uploads

What can the Salesforce Custom Response Object integration do?

- Provides a CSV that can be used to create an object in Salesforce
- Automatically generate necessary fields for response and session data
- Push structured survey response data in real time
- Return metadata for debugging and validation

You will need

- Salesforce API access and OAuth credentials
- Permission in Salesforce to create and manage custom objects
- An Alchemer plan that includes integrations and the Integration Manager permission enabled
  - Contact us if you are unsure whether your plan includes integrations.

Setup Salesforce Custom Response Object integration in surveys

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Salesforce | Custom Response Object

You will need:

- Salesforce OAuth authentication configured in Alchemer
- 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 | Custom Response Object**.

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 | CSV:** Use the download link provided to get a CSV of all of the required fields for Salesforce to build your custom object for this survey. You can use the object creator in Salesforce.

9. **Salesforce | Select object:** Select the Salesforce object that you have just created using the CSV from the previous step.

10. **Salesforce | Validation:** This step checks the the object you chose contains all required fields.

11. **Salesforce | Get Data Back:** Select the fields you want to get back.

12. Save the action.

Status codes
- 200: Successfully pushed data to Salesforce response object
- 400: The external integration returned an error

Testing and Troubleshooting

Testing and Validation

How to test
- Submit a survey response that triggers the Salesforce action.
- Confirm that a new record appears in your Salesforce custom response object.
- Verify related records (Contact, Lead, Account) are properly linked.

How to verify results

- Navigate to **Object Manager → Your Custom Response Object** in Salesforce.
- Confirm all expected response and session fields are populated.
- Check relationship fields to ensure proper linking.

Monitoring Integration Activity

Where to find logs
- Go to **Results → Individual Responses** in Alchemer.
- Select the response you want to inspect.
- Open the **Action Log** tab.

What logs display
- Success or failure status
- Timestamp
- Input and output values
- Salesforce record ID
- Returned Salesforce status codes

Troubleshooting

Authentication issues
- Expired or revoked OAuth connection
- Missing API permissions in Salesforce

Permission errors
- User does not have rights to create custom objects
- Field-level security restrictions

API errors
- Validation rule failures in Salesforce
- Required fields missing
- Field type mismatches

FAQs

What permissions do I need?
Integration Manager in Alchemer and API + object creation permissions in Salesforce.

When does the integration run?
In real time when a survey response is submitted.

Can I link responses to Contacts or Leads?
Yes. You can configure lookup relationships to associate responses with existing Salesforce records.

Will this create duplicate records?

The integration creates a new response record per submission.

Why isn't my data appearing?

Check the Action Log for authentication errors, permission issues, validation rules, or mapping problems.

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