Dovetail Integration for Alchemer Workflow

Overview

Dovetail is a customer research and insights platform that allows teams to centralize feedback, store research artifacts, analyze qualitative data, and create insights. Dovetail supports uploading documents, transcripts, PDFs, and media files into projects so researchers can tag, organize, and analyze data in a centralized workspace.

The Alchemer integration with Dovetail enables workflows to automatically send survey-generated PDFs—which are made with a Review Action—directly into a specified Dovetail project or to your Dovetail docs. This allows research teams to analyze individual responses, attach structured content to an existing research repository, and maintain a unified location for qualitative insights without manual file handling.

Common uses for the Alchemer Dovetail integration

- Automatically push Review Action PDFs into a designated Dovetail project for analysis.
- Store structured customer or respondent feedback in Dovetail for qualitative coding and tagging.

Why use a Dovetail integration?

Your browser does not support HTML5 video.

What can the Alchemer Dovetail integration do?

- Push PDF to data
- Push PDF to docs

You will need

- Dovetail API authentication (Bearer token)
- 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 Dovetail integration in workflow

Dovetail | Push PDF to data

You will need:

- Dovetail API Bearer token

- A Dovetail project
- Hidden Value Actions (HVAs) storing:
  - Review Action PDF
  - (Optional) Name to assign to PDF

Configure the survey

Your browser does not support HTML5 video.

1. Create a new or open an existing survey.

2. Add your questions to the survey.

3. Create a new page, click **Action**, and add the **Review** action.
   a. Click "yes" for *Allow respondents to download a PDF version of your review action* section

4. Create another page after the Review Action to store data in Hidden Value Actions.
   - Create a HVA to capture the merge code from the Review Action.

5. *Optional*: Add a field or HVA that contains the title you want to assign to your PDF. This will be the title of the PDF in Dovetail.

Configure the integration

Your browser does not support HTML5 video.

1. Open your workflow in **Workflow Builder**.

2. On the right side, drag and drop the **Dovetail** connection to the desired location in the workflow.

3. Click the pencil icon to edit the connection.

4. Select **Dovetail | Push PDF to data**.

5. **Dovetail | Authentication**: Get your API token and add it in the slot to authenticate with Dovetail.

6. **Dovetail | Select project**: Select which project you would like to push the PDF to

7. **Dovetail | PDF to push:** Select the HVA containing the Review Action PDF.
   a. *Optional*: Map the title of the PDF to the PDF | Title

8. Save the action.

Status codes
- 200: Outbound webhook successfully sent
- 400: Dovetail API returned an error

Dovetail | Push PDF to docs

You will need:

- Dovetail API Bearer token
- Hidden Value Actions (HVAs) storing:
  - Review Action PDF
  - (Optional) Name to assign to PDF

Configure the survey

Your browser does not support HTML5 video.

1. Create a new or open an existing survey.

2. Add your questions to the survey.

3. Create a new page, click **Action**, and add the **Review** action
   a. Click "yes" for *Allow respondents to download a PDF version of your review action* section

4. Create another page after the Review Action to store data in Hidden Value Actions.
   a. Create a HVA to capture the merge code from the Review Action.

5. *Optional:* Add a field or HVA that contains the title you want to assign to your PDF. This will be the title of the PDF in Dovetail.

Configure the integration

Your browser does not support HTML5 video.

1. Open your workflow in **Workflow Builder**.

2. On the right side, drag and drop the **Dovetail** connection to the desired location in the workflow.

3. Click the pencil icon to edit the connection.

4. Select **Dovetail | Push PDF to docs**.

5. **Dovetail | Authentication**: Get your API token and add it in the slot to authenticate with Dovetail.

6. **Dovetail | PDF to push:** Select the HVA containing the Review Action PDF.
   a. *Optional*: Map the title of the PDF to the PDF | Title

7. Save the action.

Status codes
- 200: Outbound webhook successfully sent

- 400: Dovetail API returned an error

Testing and Validation

Testing and Validation

How to test
- Trigger the workflow and monitor runs in **Results ➜ Monitor**.
  - Open individual runs to inspect metadata and response objects.
- Confirm that the uploaded PDF appears in your target Dovetail project.

How to verify results
- Open the Dovetail project and verify that the PDF appears under the chosen project or in the docs, based on which integration you ran
- Ensure the PDF title matches the value you assigned it, if you did assign a title

Monitoring Integration Activity

Where to find logs
- Navigate to **Results ➜ Monitor**.
- Select the Dovetail integration step to view logs.

What logs display
- Input and Output JSON

Troubleshooting

Authentication issues
- Expired or invalid Dovetail API token

Mapping errors
- PDF merge code not stored correctly in HVA Review Action
- Review Action did not have "yes" clicked for the section: *Allow respondents to download a PDF version of your review action*

FAQs

What permissions do I need?
Integration Manager in Alchemer and a Dovetail API token.

When does the integration run?
When the workflow reaches the Dovetail integration step.

Can I use multiple Dovetail actions in a workflow?
Yes, you may add multiple steps to push PDFs into Dovetail.

Why isn't my file appearing in Dovetail?
Check the Action Log for endpoint errors, permission issues, or PDF merge code problems.

What if I need additional functionality?

Contact Alchemer Support to request enhancements or additional Dovetail actions.