Dovetail Integration with Alchemer Survey

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 so researchers can tag, organize, and analyze data in a centralized workspace.

These actions allow Alchemer surveys to automatically send Review Action–generated PDFs into your Dovetail workspace so research teams can analyze individual responses, attach structured content to an existing research repository, and keep all qualitative insights centralized.

Common uses for the Alchemer Dovetail integration

- Automatically push Review Action PDFs into a designated Dovetail project
- Store structured respondent feedback in Dovetail for qualitative coding
- Maintain a unified repository for customer or research artifacts
- Eliminate manual downloading and uploading of PDF response files

Why use a Dovetail integration?

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What can the Alchemer Dovetail integration do?

- Push PDF to data
- Push PDF to docs

You will need

- Dovetail API Bearer token
- An Alchemer plan that includes integrations and the Integration Manager permission
  - Contact us if you're unsure if your plan includes integrations.

Setup Alchemer Dovetail integration in surveys

Dovetail | Push PDF to data

You will need:

- Dovetail API Bearer token
- A Dovetail project
- Hidden Value Actions storing:

- Review Action PDF merge code
- (Optional) A custom PDF title

Configure the survey

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1. Create or open an existing survey.

2. Add your questions to the survey.

3. Create a new page and add a **Review** action.
   - Set *Allow respondents to download a PDF version of your review action* to "Yes".

4. Create another page after the Review Action to store:
   - A Hidden Value Action capturing the Review PDF merge code

5. *Optional:* Add a field/HVA containing the PDF title you want to appear in Dovetail.

Configure the integration

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

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

3. In the Integrations section, select **Dovetail**.

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

5. **Dovetail | Authentication:** Select existing credentials or add your API token.

6. **Dovetail | Select project:** Choose the Dovetail project to receive the PDF.

7. **Dovetail | PDF to push:** Select the HVA storing the Review Action PDF.
   - *Optional:* Map the value that should be used as the PDF title.

8. Save the action.

Status codes
- 200: Successfully sent to Dovetail
- 400: Dovetail API returned an error

Dovetail | Push PDF to docs
You will need:
- Dovetail API Bearer token
- Hidden Value Actions storing:

- Review Action PDF
- Optional: PDF name/title

Configure the survey

Your browser does not support HTML5 video.

1. Create or open an existing survey.

2. Add your questions.

3. Create a page and add a **Review** action.
   - Enable the PDF download option.

4. Create a page with Hidden Value Actions to store:
   - The Review Action PDF merge code
   - (Optional) A custom PDF title

Configure the action

Your browser does not support HTML5 video.

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

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

3. Select **Dovetail** from Integrations.

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

5. **Dovetail | Authentication:** Add or select API credentials.

6. **Dovetail | PDF to push:** Choose the HVA storing the Review PDF.
   - *Optional:* Map the value that should be used as the PDF title.

7. Save.

Status codes
- 200: Successfully sent to Dovetail
- 400: Dovetail API returned an error

Testing and Troubleshooting

Testing and Validation

How to test
- Submit a test survey response that triggers the integration.
- Verify that the PDF appears in Dovetail (project or docs).

- Inspect metadata returned from the API (if mapped).

How to verify results
- Open Dovetail and confirm the PDF is present in the correct target location.
- Ensure the PDF title matches the mapped field if you provided one.

Monitoring Integration Activity

Where to find logs
- Go to **Results → Individual Responses**.
- Select a response.
- Open the **Action Log** tab to view integration activity.

What logs display
- Status (success/failure)
- Timestamp
- Input/output JSON
- Returned Dovetail status codes

Troubleshooting

Authentication issues
- Expired or invalid Dovetail API token

Mapping errors
- Review Action PDF merge code not captured correctly in the HVA
- PDF download option not enabled in Review Action

API errors
- Permission issues
- Invalid payloads (typically due to missing PDF)

FAQs

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

When does the integration run?
When a survey response reaches the Dovetail action step.

Can I use multiple Dovetail actions in a survey?
Yes — you can use multiple actions of any Dovetail type.

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

What if I need additional functionality?
Contact Alchemer Support to request additional Dovetail capabilities.

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