Basecamp Integration for Alchemer Workflow

Overview

Basecamp is a project management and team collaboration platform used by organizations to organize projects, track to-dos, and centralize team communication in one place.

The Alchemer integration with Basecamp supports person lookups and to-do item creation. The Alchemer Basecamp integration allows Alchemer to use information from Basecamp to personalize workflow paths, enrich routing logic, and add new to-do items to Basecamp projects from workflow data.

Common uses for the Alchemer Basecamp integration

- Personalize outbound emails and workflow steps using Basecamp person information
- Use Basecamp person fields in workflow logic
- Automate retrieving Basecamp person details directly from workflow data
- Reduce manual task updates and maintenance
- Create new to-do items in Basecamp triggered by workflow events

What can the Alchemer Basecamp integration do?

- Get person
- Push to-do item

Why use our Basecamp integrations?

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You will need

- Basecamp OAuth authentication (sign in with your Basecamp account). More details in the authentication how-to guide.
- An Alchemer plan that includes integrations with Workflow and the Integration Manager permission enabled.
  - Contact us if you are unsure if your plan includes integrations.

Setup Alchemer Basecamp integration in workflow

Basecamp | Get Person

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You will need:

- Basecamp login credentials
- A workflow field containing a unique identifier for a Basecamp person

Configure the action

1. Open your workflow in **Workflow builder**.
2. On the right side, drag and drop the **Basecamp** connection where you want the action to trigger.
3. In the connection box, click the pencil icon in the top-right corner.
4. Select **Basecamp | Get Person**.
5. **Basecamp | Authentication:** Select an existing authentication or create a new one.
6. **Basecamp | Select Project**: Select the Basecamp project from the dropdown that contains the person you want to get.
7. **Basecamp | Get Person:** Select the workflow field containing the unique person identifier.
8. **Basecamp | Get data back:** Select the Basecamp person fields you want returned (e.g., *name*, *email_address*, *title*, *company*).
9. Save the action.

Status codes

- 200: A person was successfully found
- 202: Multiple matches were found (first returned is used)
- 400: Error returned by Basecamp API or failed to find a matching person

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Basecamp | Push To-do Item

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You will need:

- Basecamp login credentials
- Workflow fields containing the to-do item content you want to push to Basecamp

Configure the action

1. Open your workflow in **Workflow builder**.
2. Drag and drop the **Basecamp** connection where you want the action to run.
3. Click the pencil icon in the connection box.

4. Select **Basecamp | Push To-do Item**.

5. **Basecamp | Authentication:** Select an existing authentication or create a new one.

6. **Basecamp | Select Project**: Select the Basecamp project from the dropdown that contains the to-do list you want to add an item to.

7. **Basecamp | Select To-do List:** Select the to-do list from the dropdown that you want to add a new to-do item to.

8. **Basecamp | Push To-do Item:** Choose workflow fields used to create the new to-do item. Any fields without input will have default values.
   a. **Note**: Please reference Basecamp's API documentation to ensure body parameter inputs match required Basecamp formatting.

9. **Basecamp | Get data back:** Select metadata (*message, status code*) fields to return. These help with debugging your integration.

10. Save the action.

Populating the assignee_ids field
The **assignee_ids** field on a Basecamp to-do item requires each assignee's unique Basecamp person ID. This ID is **not** displayed anywhere in the Basecamp UI, so it can't be looked up by hand the way a project name or to-do list can. Because of this, the value needs to come from the Basecamp API rather than being typed in directly.

There are two ways to provide this value:

- **Use a Get Person action (recommended)**
  1. Before your **Basecamp | Push To-do Item** action, add a **Basecamp | Get Person** action to look up the person you want to assign.
  2. In the Get Person action's **Get data back** step, make sure the person's *id* field is returned.
  3. Then, in your Push To-do Item action, map that *id* merge code into the **assignee_ids** field.

- **Provide known IDs directly:**
  - If you already have one or more Basecamp person IDs, you can map them directly to the **assignee_ids** field. To assign multiple people in a single to-do item, separate each ID with a comma and space (for example: `1234567, 2345678, 3456789`).

Status codes
- 200: Successfully created Basecamp to-do item
- 400: The Basecamp API returned an error

Testing and Troubleshooting

Testing and Validation

How to test

- Trigger the workflow and monitor individual runs in the **Monitor** tab.
    - Click into individual workflow runs to see input/output metadata.
- Confirm the expected retrieval or creation occurs in Basecamp.
- Use metadata values returned to verify success or help debug issues.

How to verify results

- Check the impacted Basecamp project, person, or to-do list directly in the Basecamp interface.
- Ensure all retrieved or created values match workflow expectations.

Monitoring Integration Activity

Where to find logs

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

What logs display

- Input/Output

Troubleshooting

Authentication issues

- Incorrect or expired OAuth session
- User lacks permission to access the selected Basecamp project

Lookup failures

- Invalid or missing unique person identifier
- No matching person found on the selected project

Mapping errors

- Missing required to-do item fields (e.g., content)
- Invalid field formatting

FAQs

What permissions do I need?
Integration Manager in Alchemer and Basecamp account access with rights to view or edit the referenced project.
When does the integration run?
When the workflow triggers and reaches the Basecamp integration step.
Can I use multiple Basecamp actions in one workflow?
Yes. Actions can run independently or in sequence.

Why isn't my data updating?

Check the Monitor logs for lookup issues, mapping problems, or API errors.

What if I need additional functionality?

Contact Alchemer Support for enhancement requests.

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