Salesforce Integration for Alchemer Survey

Overview

Salesforce is a cloud-based CRM platform used by organizations to manage customer relationships, sales pipelines, and business data. It provides teams with tools to track leads, manage contacts, automate workflows, and gain insights across the customer lifecycle.

The Alchemer integration with Salesforce supports automated record lookups, record creation, record updates, and record upserts. The Alchemer Salesforce integration allows Alchemer to use information from Salesforce to personalize surveys, enrich response data, and update Salesforce records with survey submission data.

Common uses for the Alchemer Salesforce integration

- Personalize invites and surveys using contact or record data from Salesforce
- Automatically update Salesforce records when a response is submitted
- Create new Salesforce records from survey data
- Upsert Salesforce records to keep data in sync without duplicates
- Reduce manual data entry and workflow handoff
- Keep Salesforce records synchronized with key survey-driven updates

What can the Alchemer Salesforce integration do?

- Find contact
- Update contact
- Get record
- Create record
- Update record
- Upsert record

You will need

- Salesforce OAuth authentication (sign in with your Salesforce account)
- An Alchemer plan that includes integrations with the Integration Manager permission enabled.
    - Contact us if you are unsure if your plan includes integrations.

Setup Alchemer Salesforce integration in surveys

Salesforce | Find Contact

You will need:

- Salesforce login credentials
- A survey field containing a value to look up the contact (e.g. email address, last name)

Configure the action

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

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

3. In the Add Action modal, scroll to the **Your Integrations** section.

4. Select **Salesforce**.

5. Select **Salesforce | Find Contact**.

6. **Salesforce | Authentication:** Select an existing authentication or create a new one.

7. **Salesforce | Find Contact:** Select the survey fields you want to use to find the contact record in Salesforce.
    a. **Note:** All selected fields must match for a record to be returned. If multiple records match, the most recently created record is returned.

8. **Salesforce | Get data back:** Select the Salesforce contact fields you want returned (e.g., *FirstName*, *LastName*, *Email*, *Phone*). These values can personalize survey questions or drive logic.

9. Save the action.

Status codes

- 200: A contact was successfully found
- 201: Query succeeded but no contact was found
- 202: Multiple contacts were found (most recently created is used)
- 400: Error returned by Salesforce API or failed to find a matching contact

---

Salesforce | Update Contact

You will need:

- Salesforce login credentials
- A survey field containing a value to look up the contact you want to update

Configure the action

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

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

3. In the Add Action modal, scroll to the **Your Integrations** section.

4. Select **Salesforce**.

5. Select **Salesforce | Update Contact**.

6. **Salesforce | Authentication:** Select an existing authentication or create a new one.

7. **Salesforce | Find Contact:** Select the survey fields you want to use to find the contact record in Salesforce.
   a. **Note:** All selected fields must match for a record to be returned. If multiple records match, the most recently created record is updated.

8. **Salesforce | Update Contact:** Map Alchemer survey fields to the Salesforce contact fields you want to update.

9. **Salesforce | Get data back:** Select metadata fields (e.g., *message*, *status code*) to help debug your integration.

10. Save the action.

Status codes

- 200: Contact was successfully updated
- 202: Multiple contacts were found (most recently created is updated)
- 400: The external integration returned an error or contact wasn't found

---

Salesforce | Get Record

Your browser does not support HTML5 video.

You will need:

- Salesforce login credentials
- A survey field containing a unique identifier for the Salesforce record you want to retrieve

Configure the action

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

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

3. In the Add Action modal, scroll to the **Your Integrations** section.

4. Select **Salesforce**.

5. Select **Salesforce | Get Record**.

6. **Salesforce | Authentication:** Select an existing authentication or create a new one.

7. **Salesforce | Domain:** Enter your Salesforce domain.

8. **Salesforce | Object type:** Select the Salesforce object type you want to retrieve (e.g., *Contact*, *Lead*, *Account*, *Opportunity*).

9. **Salesforce | Find Record:** Select the survey fields containing the values you want to use to find the record.

10. **Salesforce | Get data back:** Select the Salesforce fields you want returned. These values can personalize survey questions or drive logic.

11. Save the action.

Status codes

- 200: A record was successfully found
- 201: Query succeeded but no record was found
- 202: Multiple records were found (first returned is used)
- 400: Error returned by Salesforce API

Salesforce | Create Record

Your browser does not support HTML5 video.

You will need:

- Salesforce login credentials
- Survey fields containing the data you want to use to create the record

Configure the action

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

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

3. In the Add Action modal, scroll to the **Your Integrations** section.

4. Select **Salesforce**.

5. Select **Salesforce | Create Record**.

6. **Salesforce | Authentication:** Select an existing authentication or create a new one.

7. **Salesforce | Domain:** Enter your Salesforce domain.

8. **Salesforce | Object type:** Select the Salesforce object type you want to create (e.g., *Contact*, *Lead*, *Account*, *Opportunity*).

9. **Salesforce | Create Record:** Select the survey fields containing the values you want to use to create the record in Salesforce.

10. **Salesforce | Get data back:** Select metadata fields (e.g., *message*, *status code*) to help debug your integration.

11. Save the action.

Status codes

- 200: Record was successfully created
- 400: The Salesforce API returned an error

Salesforce | Update Record

Your browser does not support HTML5 video.
You will need:

- Salesforce login credentials
- A survey field containing a unique identifier for the Salesforce record you want to update

Configure the action

1. Open your survey in **Survey Builder**.
2. Select **Add New: Action**.
3. In the Add Action modal, scroll to the **Your Integrations** section.
4. Select **Salesforce**.
5. Select **Salesforce | Update Record**.
6. **Salesforce | Authentication:** Select an existing authentication or create a new one.
7. **Salesforce | Domain:** Enter your Salesforce domain.
8. **Salesforce | Object type:** Select the Salesforce object type you want to update (e.g., *Contact*, *Lead*, *Account*, *Opportunity*).
9. **Salesforce | Find Record:** Select the survey fields containing the values you want to use to find the record.
10. **Salesforce | Update Record:** Select the survey fields containing the values you want to use to update the record in Salesforce.
11. **Salesforce | Get data back:** Select metadata fields (e.g., *message*, *status code*) to help debug your integration.
12. Save the action.

Status codes

- 200: Record was successfully updated
- 400: The external integration returned an error

Salesforce | Upsert Record

Your browser does not support HTML5 video.

You will need:

- Salesforce login credentials
- A survey field containing a unique identifier for the Salesforce record
  - You can only use email for Contact and Lead lookup, otherwise this integration requires the record ID

Configure the action

1. Open your survey in **Survey Builder**.
2. Select **Add New: Action**.
3. In the Add Action modal, scroll to the **Your Integrations** section.
4. Select **Salesforce**.
5. Select **Salesforce | Upsert Record**.
6. **Salesforce | Authentication:** Select an existing authentication or create a new one.
7. **Salesforce | Domain:** Enter your Salesforce domain.
8. **Salesforce | Object type:** Select the Salesforce object type you want to upsert (e.g., *Contact*, *Lead*, *Account*, *Opportunity*).
9. **Salesforce | Find Record:** Select the survey field containing the unique identifier used to look up the existing record.
10. **Salesforce | Upsert Record:** Select the survey fields containing the values you want to use to create or update the record in Salesforce.
11. **Salesforce | Get data back:** Select metadata fields (e.g., *message*, *status code*) to help debug your integration.
12. Save the action.

Status codes

- 200: Record was successfully inserted
- 201: Record was successfully updated
- 400: The external integration returned an error

Testing and Troubleshooting

Testing and Validation

How to test

- Submit a survey response with data that triggers the integration action.
- Confirm the expected record activity in Salesforce (created, updated, retrieved, or upserted).
- Use returned metadata message to validate successful behavior.

How to verify results

- Inspect the affected Salesforce record.
- Ensure all retrieved or updated values match expectations.

Monitoring Integration Activity

Where to find logs

- Go to **Results → Individual Responses**.
- Select the response you want to inspect.
- Open the **Action Log** tab.

What logs display

- **Success or failure status**
- Timestamp
- Input and output values
- Returned status codes from Salesforce

Troubleshooting

Authentication issues

- Incorrect permissions granted in Salesforce
  - **Note:** If using the Tray.io integration, ensure the authenticating Salesforce user has the **Approve Uninstalled Connected Apps** permission enabled.
- Expired OAuth session

Lookup failures

- Invalid or missing field values used for lookup
- No matching record found

Mapping errors

- Incorrect field formatting (e.g., dates must match Salesforce expected format)
- Unsupported or read-only fields

API errors

- Salesforce validation failures
- Endpoint or object type restrictions

FAQs

What permissions do I need?

Integration Manager in Alchemer and API access in Salesforce. If using Tray.io, the authenticating Salesforce user must also have the **Approve Uninstalled Connected Apps** permission.

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

Can I use multiple Salesforce actions in one survey?
Yes. Actions can run independently or in sequence.

Why isn't my data updating?
Check the Action Log for lookup issues, mapping mismatches, or API errors.

What if I need additional functionality?
Contact Alchemer Support for enhancement requests.

Related Articles