NetSuite integration for Alchemer Survey

Overview

NetSuite is a cloud-based ERP platform used by organizations to manage financials, customer records, orders, inventory, and other core business data. It provides a unified system of record that teams use to run operations and keep business information consistent across departments.

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

Common uses for the Alchemer NetSuite integration

- Personalize invites and surveys with information in NetSuite
- Use NetSuite record fields in survey logic
- Automate data retrieval and updates between Alchemer and NetSuite
- Reduce manual data entry and record maintenance
- Keep NetSuite records synchronized with responses collected in Alchemer
- Create new NetSuite records from survey data

What can the Alchemer NetSuite integration do?

- Get record
- Create record
- Update record
- Upsert record

You will need

- NetSuite API access and credentials. More details in the authentication how-to guide.
- 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 NetSuite integration in surveys

NetSuite | Get Record

You will need:

- NetSuite API credentials

- A survey field containing a unique identifier for the NetSuite 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 **NetSuite**.
5. Select **NetSuite | Get Record**.
6. **NetSuite | Authentication:** Select an existing authentication or create a new one.
7. **NetSuite | Select record type**: Please enter the NetSuite record type you would like to use.
8. **NetSuite | Find Record:** Select the fields in this survey that contain the values you want to use to find the specific record in NetSuite.
9. **NetSuite | Get data back:** Select the fields that you would like to get back.
10. Save the action.

Status codes

- 200: Successfully retrieved record
- 201: Query ran successfully, but no records were found
- 202: Multiple records were found. The first record was returned
- 400: The external integration returned an error.

NetSuite | Create Record

You will need:

- NetSuite API credentials
- Survey fields containing the data used 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 **NetSuite**.
5. Select **NetSuite | Create Record**.
6. **NetSuite | Authentication:** Select an existing authentication or create a new one.

7. **NetSuite | Select record type**: Please enter the NetSuite record type you would like to use.

8. **NetSuite | Create Record:** Select the fields in this survey that contain the values you want to use to create the specific record in NetSuite.

9. **NetSuite | Get data back:** Select the fields that you would like to get back.

10. Save the action.

Status codes

- 200: Successfully created record
- 400: The external integration returned an error

NetSuite | Update Record

You will need:

- NetSuite API credentials
- A survey field containing a unique identifier for the NetSuite 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 **NetSuite**.

5. Select **NetSuite | Update Record**.

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

7. **NetSuite | Select record type**: Please enter the NetSuite record type you would like to use.

8. **NetSuite | Find Record:** Select the fields in this survey that contain the values you want to use to find the specific record in NetSuite.

9. **NetSuite | Update Record:** Select the fields in this survey that contain the values you want to use to update a record in NetSuite.

10. **NetSuite | Get data back:** Select the fields that you would like to get back.

11. Save the action.

Status codes

- 200: Successfully updated record
- 201: Query ran successfully, but no records were found
- 202: Multiple records were found. No records were updated

- 400: The external integration returned an error

NetSuite | Upsert Record

You will need:

- NetSuite API credentials
- A survey field containing the lookup value used to find an existing 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 **NetSuite**.
5. Select **NetSuite | Upsert Record**.
6. **NetSuite | Authentication:** Select an existing authentication or create a new one.
7. **NetSuite | Select record type**: Please enter the NetSuite record type you would like to use.
8. **NetSuite | Find Record:** Select the fields in this survey that contain the values you want to use to find the specific record in NetSuite.
9. **NetSuite | Upsert Record:** Select the fields in this survey that contain the values you want to use to update or create a record in NetSuite.
10. **NetSuite | Get data back:** Select the fields that you would like to get back.
11. Save the action.

Status codes

- 200: Successfully upserted record
- 202: Multiple records were found. No records were 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 retrieval, creation, update, or upsert occurs in NetSuite.

- Use the returned metadata message to validate successful behavior.

How to verify results

- Check the impacted record directly in NetSuite.
- 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 NetSuite

Troubleshooting

Authentication issues

- Incorrect or expired credentials
- Missing permissions in NetSuite. Check the authentication guide.

Lookup failures

- Invalid identifier values
- No matching records

Mapping errors

- Unsupported or invalid fields
- Incorrect formatting

API errors

- Validation issues
- Endpoint restrictions

FAQs

What permissions do I need?

Integration Manager in Alchemer and API permissions in NetSuite.

When does the integration run?

In real time when a survey response is submitted.

Can I use multiple NetSuite 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 problems, or API errors.

What if I need additional functionality?

Contact Alchemer Support for enhancement requests.

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