NetSuite integration for Alchemer Workflow

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 get data, personalize workflow paths, enrich routing logic, create merge codes, and update information in NetSuite without manual intervention.

Common uses for the Alchemer NetSuite integration

- Personalize emails and workflow steps with information in NetSuite
- Use NetSuite record fields in workflow 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 triggered by workflow events

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 workflow

NetSuite | Get Record

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You will need:

- NetSuite API credentials
- A workflow field containing a unique identifier for the NetSuite record

Configure the action

1. Open your workflow in **Workflow builder**.
2. On the right side, drag and drop the **NetSuite** connection where you want the action to trigger.
3. In the connection box, click the pencil icon in the top-right corner.
4. Select **NetSuite | Get Record**.
5. **NetSuite | Authentication:** Select an existing authentication or create a new one.
6. **NetSuite | Select record type**: Please enter the NetSuite record type you would like to use.
7. **NetSuite | Find Record:** Select the fields in this survey that contain the values you want to use to find the specific record in NetSuite.
8. **NetSuite | Get data back:** Select the NetSuite record fields you want returned. These can be used to personalize workflow steps or drive logic.
9. 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

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You will need:

- NetSuite API credentials
- Workflow fields containing the data used to create the record

Configure the action

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

4. Select **NetSuite | Create Record**.
5. **NetSuite | Authentication:** Select an existing authentication or create a new one.
6. **NetSuite | Select record type**: Please enter the NetSuite record type you would like to use.
7. **NetSuite | Create Record:** Select the fields in this workflow that contain the values you want to use to create the specific record in NetSuite.
8. Save the action.

Status codes

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

NetSuite | Update Record

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You will need:

- NetSuite API credentials
- A workflow field containing a unique identifier for the NetSuite record you want to update

Configure the action

1. Open your workflow in **Workflow builder**.
2. Drag and drop the **NetSuite** connection where you want the action to run.
3. Click the pencil icon in the connection box.
4. Select **NetSuite | Update Record**.
5. **NetSuite | Authentication:** Select an existing authentication or create a new one.
6. **NetSuite | Select record type**: Please enter the NetSuite record type you would like to use.
7. **NetSuite | Find Record:** Select the fields in this workflow that contain the values you want to use to find the specific record in NetSuite.
8. **NetSuite | Update Record:** Select the fields in this workflow that contain the values you want to use to update a record in NetSuite.
9. 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

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You will need:

- NetSuite API credentials
- A workflow field containing the lookup value used to find an existing record

Configure the action

1. Open your workflow in **Workflow builder**.
2. Drag and drop the **NetSuite** connection where you want the action to run.
3. Click the pencil icon in the connection box.
4. Select **NetSuite | Upsert Record**.
5. **NetSuite | Authentication:** Select an existing authentication or create a new one.
6. **NetSuite | Select record type**: Please enter the NetSuite record type you would like to use.
7. **NetSuite | Find Record:** Select the fields in this workflow that contain the values you want to use to find the specific record in NetSuite.
8. **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.
9. 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

- 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, creation, update, or upsert occurs in NetSuite.
- Use the metadata values returned to verify success or help debug issues.

How to verify results

- Check the impacted record directly in NetSuite.
- Ensure all retrieved or updated 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 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?

When the workflow triggers and reaches the NetSuite integration step.

Can I use multiple NetSuite actions in one workflow?

Yes. Actions can work independently or together.

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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