Salesforce

Overview

The Salesforce integration connects Alchemer Voice directly to your Salesforce CRM so you can bring key sales and customer data into Alchemer Voice for deeper analysis. The connection is API based and supports most of the standard Salesforce objects used for sales tracking and customer management.

Who this is for

The Salesforce integration is a good fit for Product Managers, Revenue Operations, Sales teams, and anyone who wants to connect customer feedback and conversation insights to CRM data. If Salesforce is your primary CRM, this is the integration to reach for first.

What you can do with the Salesforce integration

Alchemer Voice pulls detailed information from your standard Salesforce objects and uses it to give your insights and topics firmographic and financial context, which makes the information genuinely useful for commercial decisions. Depending on the Salesforce products you own, the following objects are available.

Salesforce capability	Objects available in Alchemer Voice
Standard CRM integration	Opportunity, Opportunity History, Account, Contact, Lead, Product, User, and Currency Type (when multi-currency is enabled)
Salesforce Service Cloud	Case and Case Comments
Salesforce Voice	Call records
Custom objects	Any custom object exposed through a Salesforce List that you reference in your Alchemer Voice configuration

Beyond object data, the integration also lets you:

- Embed Alchemer Voice directly in Salesforce with the Lightning App, so you can view your Alchemer Voice data and use the Analyst on Opportunity, Lead, Contact, and Account pages.
- Import custom fields as search filters in Alchemer Voice, so you can aggregate and report on your data using your own fields.
- Bring in custom objects by creating a Salesforce List that references the object and configuring Alchemer Voice to pull from that list.

How it works

You make the initial connection using OAuth, signing in with either a Salesforce admin user or a dedicated service user. Alchemer Voice then pulls data from the relevant Salesforce objects based on what is available in your org and how you have configured the integration. If you use Service Cloud or Salesforce Voice, those objects are included as long as you have opted in.

Conversations and insights in Alchemer Voice are linked to the matching Salesforce records, so you can see which accounts, opportunities, contacts, or leads mention a specific request or issue. The Lightning App is available through the Salesforce AppExchange. Once it is installed, you can embed Alchemer Voice features and insights directly inside Salesforce pages, so users see relevant conversation data right alongside their CRM information.

Before you start

To use the integration, you will need:

- Alchemer Voice Admin privileges
- Salesforce access with admin permissions, or a designated service user.
- For custom object support, a Salesforce List that references the custom object for Alchemer Voice to pull from.

Set up the integration

1. Sign in to Salesforce as an admin user or a dedicated service user with the permissions above.

2. Connect Salesforce to Alchemer Voice using OAuth, authorizing the connection with your admin or service user.

3. Choose the objects you want to sync. Standard CRM objects are included by default; opt in to Service Cloud or Salesforce Voice objects if you use those products.

4. To sync a custom object, create a Salesforce List that references it, then configure Alchemer Voice to pull from that list. Add any custom fields you want to use as search filters.

5. (Optional) Install the Alchemer Voice Lightning App from the Salesforce AppExchange, then add the Alchemer Voice components to the record page layouts where you want them (Opportunity, Lead, Account, and Contact pages).

Common use cases

- View customer insights for a specific opportunity directly within Salesforce, with no need to switch tools.
- Automatically link product feedback and conversations to accounts and leads in Salesforce, so Sales and Product teams can collaborate from the same context.
- Pull in custom object data, such as specialized sales processes or customer types, for analysis

when your Salesforce instance uses custom objects.
- Embed Alchemer Voice summaries and conversation analysis on Opportunity, Lead, Contact, and Account pages so everyone sees customer evidence in context.

Frequently asked questions

Which Salesforce objects are supported?

The standard integration pulls Opportunity, Opportunity History, Account, Contact, Lead, Product, User, and Currency Type (when you use multi-currency). Service Cloud adds Case and Case Comments. Salesforce Voice adds Call records.

How do custom objects work?

Create a Salesforce List that references your custom object, then configure Alchemer Voice to pull from that list.

Is the connection secure?

Yes. The integration uses OAuth authentication, with the option to connect through an admin or a service user account. Alchemer Voice also sends its requests from a single IP address, which makes it compatible with Salesforce IP restriction features. Alchemer Voice operates under strict security and privacy policies (see the Alchemer Trust Center for details).

Does Alchemer Voice write data back to Salesforce?

Alchemer Voice does not edit or overwrite your existing Salesforce data.

How do I install the Lightning App in Salesforce?

Install the Alchemer Voice Lightning App from the Salesforce AppExchange, then add the Alchemer Voice components to the record page layouts you want (Opportunity, Lead, Account, and Contact pages).

Can I see Alchemer Voice information inside Salesforce?

Yes. With the Lightning App installed, Alchemer Voice panels display relevant insight information for each record type you choose.

What if my Salesforce setup uses custom fields or objects?

You can configure Alchemer Voice to pull from custom objects by creating Lists in Salesforce, and you can set custom fields as search filters in Alchemer Voice so you can aggregate and filter by your own data.

How often does Alchemer Voice update Salesforce data?

Data is refreshed every few minutes.

Does the integration work with multi-currency?

Yes. Alchemer Voice also pulls Currency Type when multi-currency is enabled.

Are Service Cloud and Salesforce Voice required?

No. Both are optional. The standard integration works with your Sales and CRM objects.

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