

Passare Integration with Alchemer Workflow

Overview

Passare is a case management platform used by funeral homes and cremation providers to manage cases, arrangements, and related workflows.

The Alchemer integration with Passare supports case lookups, acquaintance lookups, and acquaintance contact information lookups. The Alchemer Passare integration allows Alchemer to use information from Passare to get data, personalize workflow paths, enrich routing logic, create merge codes, and update information in Passare without manual intervention.

Common uses for the Alchemer Passare integration

- Personalize emails and workflow steps with case information from Passare
- Use Passare case and acquaintance information in workflow logic
- Automate data retrieval between Alchemer and Passare
- Reduce manual lookups of case and acquaintance records
- Keep downstream systems synchronized with case data collected in Passare
- Retrieve acquaintance contact details for follow-up communications

What can the Alchemer Passare integration do?

- [Get case details](#)
- [Get case acquaintance](#)
- [Get acquaintance contact information](#)

You will need

- Passare API Token. [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 Passare integration in workflow

Passare | Get Case Details

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You will need:

- Passare API Token. [More details in the authentication how-to guide.](#)

- A workflow field containing the unique case identifier (case_uuid) for the case you want to look up

Configure the action

1. Open your workflow in **Workflow builder**.
2. On the right side, drag and drop the **Passare** connection where you want the action to trigger.
3. In the connection box, click the pencil icon in the top-right corner.
4. Select **Passare | Get Case Details**.
5. **Passare | Authentication**: Select an existing authentication or [create a new one](#).
6. **Passare | Find Case**: Select the Alchemer field containing the case's unique identifier (case_uuid).
7. **Passare | Get data back**: Select the Passare case fields you want returned (e.g., case name, case status, case type, service date).
8. Save the action.

Status codes

- 200: Successfully retrieved case details.
 - 400: The external integration returned an error.
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Passare | Get Case Acquaintance

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You will need:

- Passare API Token. [More details in the authentication how-to guide](#).
- A workflow field containing the unique case identifier (case_uuid) associated with the acquaintance you want to look up

Configure the action

1. Open your workflow in **Workflow builder**.
2. On the right side, drag and drop the **Passare** connection where you want the action to trigger.
3. In the connection box, click the pencil icon in the top-right corner.
4. Select **Passare | Get Case Acquaintance**.
5. **Passare | Authentication**: Select an existing authentication or [create a new one](#).
6. **Passare | Acquaintance type**: Select the acquaintance type of the acquaintances you would like to return. When mapping multiple types, they will be prioritized by the first mapped.

7. **Passare | Find case acquaintance:** Select the field in this workflow that contains the case_uuid you want to use to find the specific case in Passare.
8. **Passare | Get data back:** Select the fields that you would like to get back. If wanting to retrieve contact information, "contact_information_uuid" must be mapped.
9. Save the action.

Status codes

- 200: Successfully retrieved case acquaintance.
 - 201: Query ran successfully. No acquaintances were found.
 - 202: Multiple acquaintances were found. The first acquaintance was returned.
 - 400: The external integration returned an error.
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Passare | Get Acquaintance Contact Information

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You will need:

- Passare API Token. [More details in the authentication how-to guide.](#)
- A workflow field containing an acquaintance's contact information identifier (contact_information_uuid, retrieved from the "Get Case Acquaintance" integration) for the contact information you want to look up.

Configure the action

1. Open your workflow in **Workflow builder**.
2. On the right side, drag and drop the **Passare** connection where you want the action to trigger.
3. In the connection box, click the pencil icon in the top-right corner.
4. Select **Passare | Get Acquaintance Contact Information**.
5. **Passare | Authentication:** Select an existing authentication or [create a new one](#).
6. **Passare | Get acquaintance contact information:** Select the Alchemer field containing the acquaintance's contact_information_uuid.
7. **Passare | Get data back:** Select the contact information fields you want returned (e.g., email, phone number, address).
8. Save the action.

Status codes

- 200: Successfully retrieved contact information.
- 201: Query ran successfully. No contacts were found.
- 202: Multiple contacts were found. The first contact's information was returned.
- 400: The external integration returned an error.

Passare Full Walkthrough

Setup and invalid acquaintance type:

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Valid acquaintance type:

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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 occurs from Passare.
- Use metadata values returned to verify success or help debug issues.

How to verify results

- Check the impacted case or acquaintance record directly in Passare.
 - Ensure all retrieved values match workflow expectations.
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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 API Token
- Missing permissions in Passare

Lookup failures

- Invalid or missing unique identifier (case_uuid or acquaintance ID)
- No matching case, acquaintance, or contact information found in Passare

Mapping errors

- Invalid field types (e.g., wrong date format)

API errors

- Passare validation failures
- Endpoint restrictions

FAQs

What permissions do I need?

Integration Manager in Alchemer and API access in Passare.

When does the integration run?

When the workflow triggers and reaches the Passare integration step.

Can I use multiple Passare 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.

Related Articles
