Alchemer Voice Data in Microsoft Excel

Excel's Get Data (Power Query) can load Alchemer Voice conversation, insight, topic and CRM data over the OData feed, and refresh it on demand. The feed is read-only.

Connect

Before you begin

- A version of Excel with Get Data on the Data tab
- Alchemer Voice Admin privileges

Steps

1. In Alchemer Voice, go to **Admin > Connections** and scroll to **Data services**.
2. On the **Microsoft Excel** card, click **Connect**. The "Connecting Excel" window shows the OData URL, your **Username** (your email address) and **Password** (a newly generated personal access token).
3. In Excel, open the **Data** tab and choose **Get Data (Power Query)**, then select **OData**.
4. Paste the URL from the Alchemer Voice window.
5. Choose **Basic** as the authentication kind and enter the username and password from the window.
6. Follow the prompts to choose the tables to import. Table names and fields are in the OData API reference article.

Tokens

Each time you open the window a new token named "Excel" is created under **Admin > Connections > Access tokens > Personal tokens**. Tokens last one year. Revoke any you no longer use.

Troubleshooting

- **Credentials rejected:** the authentication kind must be Basic, and the password is the token, not your Alchemer Voice password.
- **Token expired or revoked:** click **Connect** on the Excel card to create a new one, then update the credentials in Excel under **Data > Get Data > Data Source Settings**.

Permissions

The feed shows only the data that your Alchemer Voice user can see.

To manage the personal token this connection creates, see API access tokens and OAuth clients.

If you need help, contact Alchemer Support.

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