Productboard

The Productboard integration pushes customer conversations from Alchemer Voice into Productboard as notes. It works in one direction: Alchemer Voice creates notes, tags, users, and companies in Productboard, and doesn't import or modify your features or existing notes. Segments control which conversations are pushed.

Set up

Before you begin

- A Productboard account that can approve the connection and create notes in your workspace. Alchemer Voice asks for permission to read and write notes and entities, read members and users, and write fields.
- The **Manage connections** permission in Alchemer Voice. See Roles and permissions.

Steps

1. In Alchemer Voice, go to **Admin > Connections** and find **Productboard** under **Product management tools**.
2. Click **Connect**, sign in to Productboard, and approve access.
3. Once connected, if you have no segments yet, Alchemer Voice creates a starting segment that pushes new conversations from the moment you connect.
4. Click **Settings** on the card to open the Productboard settings.

Segments

Under **Conversation segments to push**, each segment decides which conversations are sent.

1. Click **Add segment**, or the pencil icon on an existing one.
2. Set **Push conversations from**, the earliest conversation date. It starts at today, so older conversations aren't pushed unless you change it.
3. Add conversation, participant, and CRM filters.
4. Choose which insight types are included in the note. A new segment includes feature requests by default.
5. Click **Save**.

To remove a segment, click the bin icon and confirm with **Delete**. Conversations from a deleted segment are no longer pushed, and notes already created stay in Productboard. Deleting all segments stops pushing without disconnecting.

What a note contains and when it's created

- **Title:** "Four/Four: Conversation with [account] on [date]", or "Four/Four: Conversation on [date]" if no account is known.
- **Content:** Conversation details, external and internal participants, the summary, a link back to the conversation in Alchemer Voice, and the insights that match the segment. Every note is tagged **Four/Four**, a tag that is created in Productboard for you.
- **Eligibility:** The conversation must have finished processing, have a summary, and contain at least one insight matching the segment. Each conversation is pushed once and not again.
- **Timing:** New conversations are pushed as soon as they finish processing. Saving a segment also pushes existing conversations that match it.

Which customer a note is attached to

- If the conversation has exactly one external speaker with an email address, the note is linked to that person as a Productboard user (created if needed).
- Otherwise, it's linked to the conversation's CRM account as a Productboard company, matched by the account's domain or created if missing.
- If neither is available, the note is created without a customer.

Troubleshooting

- **Authentication failed:** Productboard no longer accepts Alchemer Voice's access. Click **Disconnect**, then **Connect** and approve access again.
- **Setup error:** Setup didn't finish. Click **Connect** to run it again.
- **No notes appear:** Check that the segment is saved, its **Push conversations from** date is earlier than your conversations, and the conversations are fully processed and contain insights of the selected types.
- **A note has no customer:** The conversation had more than one external speaker and no CRM account with a website domain.

Permissions

Connecting Productboard requires the **Manage connections** permission, which is normally held by admins. See Roles and permissions.

If you need help, contact Alchemer Support.

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