Alchemer Voice Connections overview

The Connections tab in Admin (Admin > Connections) links Alchemer Voice to the tools your company uses. Each integration has its own article with setup details; you'll find them all in Connections / Integrations for Alchemer Voice.

What you can connect

Integrations are grouped by purpose: call recording (such as Gong), CRM, service management, productivity services, collaboration tools, product management tools, governance, data services, and access tokens (personal tokens, OAuth clients and webhooks). Recordings and support tickets or cases are imported as conversations. Connecting Outlook 365 or Gmail (through Google Workspace) brings in email conversations.

For access tokens, OAuth clients and webhooks, see API access tokens and OAuth clients and Webhooks.

Connect and disconnect

Select Connect on the integration's card, then sign in to the other tool and approve access, using an account with enough access to the data you want Alchemer Voice to read. Some integrations ask for an API key or similar details instead.

Disconnecting stops new data coming in, and you can connect again at any time.

Once a card is Connected or Syncing, a Settings button (cog) appears on integrations that have options, including Salesforce, HubSpot, Dynamics 365, Attio, Atlassian Jira, Craft.io, Notion, Productboard and Zoom. Settings cover items such as which records or projects to include, and custom filters and lists.

Card statuses

Status	Meaning and action
Syncing...	Connected, and the first import is still running. Data appears progressively. The card refreshes every 30 seconds.
Authentication failed	Alchemer Voice connected before, but the credentials are no longer accepted (for example, the token expired or access was revoked). Select Disconnect, then connect again with a user who has the required access.

Status	Meaning and action
Setup error	The connection couldn't be verified, for example because a connection detail was entered incorrectly. Check the details and select Connect again. If it persists, contact Alchemer Support.
Not available	Grayed out because the card can't be used on your account. For example, if you've connected one phone provider, the same system's other regional versions are shown as unavailable.

If a connection attempt fails, a warning at the top of the page names the service and shows the error returned by the provider. If the problem continues, share it with Alchemer Support.

Multiple Salesforce, HubSpot or Dynamics 365 accounts

If your company has several instances, such as separate Salesforce orgs after an acquisition, you can connect each one.

1. After the first account is connected, select the + button on the Salesforce, HubSpot or Dynamics 365 card.
2. An "Instance #2" card (then #3, and so on) appears. Connect it and sign in to the other account. Each instance has its own Settings.

To remove an instance that is Not connected or has a Setup error, select - on it and confirm Delete. All records synced from that instance are removed.

Calling and service desk cards for HubSpot, Salesforce and Dynamics 365 also appear once per instance.

First import

When you first connect a conversation, ticket or email source, Alchemer Voice imports the previous 90 days, then keeps up to date. This applies to call recorders, support desks, CRM activity such as calls and cases, and Gmail and Outlook mail. Older content isn't imported automatically. Contact Alchemer Support if you need a longer history.

Whether Alchemer Voice writes anything back to a connected tool depends on the integration; see its article.

Permissions

Connecting and managing integrations is limited to people with the right access.

Area	Requirement	Default roles

Area	Requirement	Default roles
Connections tab: connect, disconnect and configure integrations	The **Manage connections** permission in Alchemer Voice	Admin
Four/Four app inside HubSpot or Salesforce	A user license for that CRM, in addition to an Alchemer Voice account	Not tied to a role; set under Admin > Team

Without Manage connections, the Connections tab isn't shown. See Roles and permissions.

CRM license options appear when you invite or edit a user (Admin > Team) once that CRM is connected. People without a license see a message in the CRM saying they aren't licensed. See User Management.

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