

How to Find and Return or Update a Salesforce Contact

The Alchemer Salesforce Integration is available as an add-on. If you are interested in purchasing the Salesforce Integration, please [contact us](#) for additional information.

If you have purchased the Salesforce Integration and are not seeing it in your account, [don't hesitate to reach out](#).

At a high-level, Alchemer's integration with Salesforce allows you to easily:

- Push survey data from Alchemer into Salesforce to update contacts.
- Pull data from Salesforce contact records into Alchemer, for use in surveys or email campaigns.

What are some examples of the Alchemer Salesforce Integration in practice:

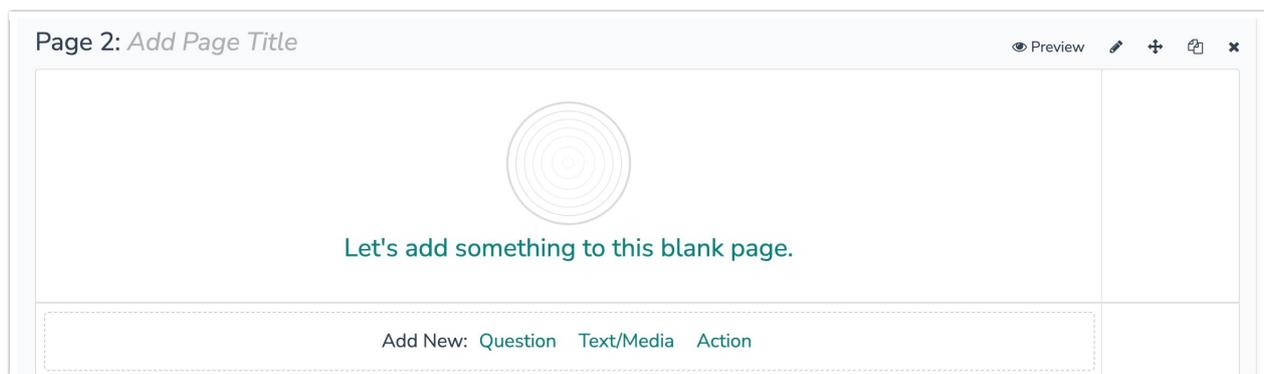
- Bring in data from Salesforce contact records to personalize surveys sent through Alchemer.
- Pull demographic information from Salesforce contact records to use for reporting purposes.
- Use Alchemer survey data to update Salesforce contact records.

Integration Setup

Adding an Integration Action

1. Select an existing survey or create a new survey. Then navigate to the Survey Builder.
2. Click "Add New: Action"

You cannot add this Integration Action to the first page of the survey.



3. In the Add Action modal, scroll down to Integrations. Then click "Add" for one of your purchased

integrations.

The screenshot shows the Alchemer Customer Experience Survey editor. The top navigation bar includes 'BUILD', 'STYLE', 'TEST', 'SHARE', 'RESULTS', and 'TOOLS'. The left sidebar lists 'PRODUCTS' (Survey, Workflow) and 'TOOLS' (Audience, Design Library, Research Library, Integrations). The main workspace is titled 'Page 1: Add Page Title' and contains two questions. The first question is '1. What is your email address?' with a text input field and a validation message 'This question has answer validation Email format expected'. The second question is '2. Please tell us about your experience so far?' with a text area. A context menu is open over the first question, showing options: 'INSERT: Question', 'Text / Media', 'Action', and 'Page Break'. On the right, there are 'Edit', 'Move', 'Copy', and 'Remove' buttons for each question.

If you haven't purchased any additional integrations, you will see the below screen:

Integrations

Don't see what you're looking for? [Explore our integrations](#)

4. Select the action you would like to perform.

The screenshot shows the 'Edit Action' configuration screen. The top navigation bar has 'PRIMARY SETUP', 'LOGIC', and 'ADVANCED'. Below the navigation is a 'Back' button. The main heading is 'Select Action' with the instruction 'Select the action you would like to perform.' There are two action cards: 'Find Contact' (Find and return a Contact in Salesforce) and 'Update Contact' (Update a Contact in Salesforce). At the bottom, there are 'Cancel' and 'Next' buttons.

Configuration: Find Contact

1. Select "Find Contact"

The screenshot shows the 'Edit Action' configuration interface. At the top, there is a dark blue header with the title 'Edit Action' and three tabs: 'PRIMARY SETUP', 'LOGIC', and 'ADVANCED'. Below the header, there is a back arrow and the text '< Back'. The main content area is titled 'Select Action' and contains the instruction 'Select the action you would like to perform.' A single action card is visible, titled 'Find Contact' with the description 'Find and return a Contact in Salesforce'. At the bottom right, there are two buttons: 'Cancel' and 'Next'.

2. Hit next on the integration overview screen.

The screenshot shows the 'Salesforce | Find Contact' integration overview screen. It features a dark blue header with 'Edit Action' and tabs for 'PRIMARY SETUP', 'LOGIC', and 'ADVANCED'. The main content area is titled 'Salesforce | Find Contact' and includes the description 'Find a Salesforce contact record.' Below this, there is a section titled 'You will need:' followed by a bulleted list: 'Your Salesforce login' and 'Fields in this survey that will contain the data used to find the Salsforce contact record'. A link 'Need help? [Learn more](#)' is provided. At the bottom left, there are four dots, with the first one filled. At the bottom right, there are 'Previous' and 'Next' buttons.

3. Connect your Salesforce account.

Edit Action

PRIMARY SETUP LOGIC ADVANCED

Salesforce | Authentication

Connect to your Salesforce account.

Salesforce connected

Previous **Next**

4. Select the fields in this survey you want to use to find the specific contact record in Salesforce.

When mapping fields keep in mind:

1. **All fields must match when multiple fields are selected.** For example, if you are using last name and email address to find a contact record, both provided values must match in Alchemer and Salesforce.
2. **The most recently created record is returned when more than one match is found.** For example, if there multiple contacts using the same email address in Salesforce, only the most recently created contact will be returned.

Edit Action

PRIMARY SETUP

LOGIC

ADVANCED

Salesforce | Find the contact record

We need to find the contact record when the survey runs.

Select the fields in this survey you want to use to find the specific contact record in Salesforce.

Click 'Add a new mapping' below to get started.

Match this Alchemer field value

to a value in this Contact field

4. What is your customer email address? (id: 10) ▼

Salesforce | Contact | ZI Business Email ▼



Add a new mapping

Note:

- All fields must match when multiple fields are selected.



Previous

Next

How to Create Fields in Alchemer

1. Add survey questions that when answered will provide the desired field. (Example: What is the customer email address?)
2. Create a container using a [Hidden Value](#). These Hidden Values can then be mapped to fields in Salesforce and used as [Merge Codes](#) in your survey.

5. Select the Salesforce Contact fields you want to use in your survey.

Edit Action

PRIMARY SETUP LOGIC ADVANCED

Salesforce | Get data back

Select the Salesforce Contact fields you want to use in your survey.

[Get this field from Salesforce](#) [To update this Alchemer survey field](#)

Salesforce Contact First Name	Customer First Name (id: 12)
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Add a new mapping

Previous **Next**

6. Click "Save".

Edit Action

PRIMARY SETUP LOGIC ADVANCED

Salesforce | Setup complete

A log of each run result can be found in the Individual Responses > Action Log.

Previous **Save**

Advanced Functionality (Optional)

After a Salesforce Find Contact action occurs, data about the action is available for use in your survey. You can map this data back to fields in Alchemer. These fields are intended to be used with custom scripts or to provide more details on what exactly the query returned.

Edit Action

PRIMARY SETUP LOGIC ADVANCED

Salesforce | Get data back

Select the Salesforce Contact fields you want to use in your survey.

Get this field from Salesforce To update this Alchemer survey field

Choose an option Choose an option

- Action | Metadata | errors
- Action | Metadata | execution_start_time
- Action | Metadata | formatted_response
- Action | Metadata | message
- Action | Metadata | raw_response
- Action | Metadata | status_code

Previous Next

Configuration: Update Contact

1. Select "Update Contact".

Edit Action

PRIMARY SETUP LOGIC ADVANCED

< Back

Select Action

Select the action you would like to perform.

Find Contact
Find and return a Contact in Salesforce

Update Contact
Update a Contact in Salesforce

Cancel Next

2. Hit next on the integration overview screen.

The screenshot shows the 'Edit Action' interface for 'Salesforce | Update Contact'. At the top, there is a dark blue header with the title 'Edit Action' and three tabs: 'PRIMARY SETUP', 'LOGIC', and 'ADVANCED'. Below the header, the main content area has the title 'Salesforce | Update Contact' and a subtitle 'Update a Salesforce contact record.' Underneath, there is a section titled 'You will need:' followed by a bulleted list: 'Your Salesforce login', 'Fields in this survey that will contain the data used to find the Salsforce contact record', and 'Fields in this survey that will contain the data you want to use to update the contact'. A link 'Need help? [Learn more](#)' is located below the list. At the bottom of the screen, there is a progress indicator with five dots, the first of which is filled, and two buttons: 'Previous' and 'Next'.

3. Connect your Salesforce account.

The screenshot shows the 'Edit Action' interface for 'Salesforce | Authentication'. At the top, there is a dark blue header with the title 'Edit Action' and three tabs: 'PRIMARY SETUP', 'LOGIC', and 'ADVANCED'. Below the header, the main content area has the title 'Salesforce | Authentication' and a subtitle 'Connect to your Salesforce account.' Below the subtitle, there is a dropdown menu with the text 'Salesforce connected' and a small Salesforce logo on the left. To the right of the dropdown is a three-dot menu icon. At the bottom of the screen, there is a progress indicator with five dots, the first of which is filled, and two buttons: 'Previous' and 'Next'.

4. Select the fields in this survey you want to use to find the specific contact record in Salesforce.

When mapping fields keep in mind:

1. **All fields must match when multiple fields are selected.** For example, if you are using last name and email address to find a contact record, both provided values must match in Alchemer and Salesforce.
2. **The most recently created record is returned when more than one match is found.** For example, if there multiple contacts using the same email address in Salesforce, only the most recently created contact will be returned.

Edit Action

PRIMARY SETUP LOGIC ADVANCED

Salesforce | Find the contact record

We need to find the contact record to update when the survey runs.
Select the fields in this survey you want to use to find the specific contact record in Salesforce.
Click 'Add a new mapping' below to get started.

Match this Alchemer field value to a value in this Contact field

3. What is your email address? (id: 73) ▼	Salesforce Contact Email ▼	🗑️
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[Add a new mapping](#)

Note:

- All fields must match when multiple fields are selected.

Previous **Next**

5. Map fields in Alchemer to corresponding fields in Salesforce.

For **Update Salesforce Customer Records**, you will map a survey field in Alchemer to a corresponding field in Salesforce. This will push the data from that survey field into Salesforce and update the corresponding field for that customer record.

How to Create Fields in Alchemer

1. Add survey questions that when answered will provide the desired field. (Example: What is the customer email address?)
2. Create a container using a [Hidden Value](#). These Hidden Values can then be mapped to fields in Salesforce and used as [Merge Codes](#) in your survey.

Edit Action

PRIMARY SETUP LOGIC ADVANCED

Salesforce | Update the contact

Select the fields in this survey you want to use to update the Contact record in Salesforce.

Use data from this Alchemer field **To update this Salesforce field**

7. Please indicate your level of satisfaction with t... Choose an option ^ 🗑️

Add a new mapping

- Salesforce | Contact | Business Phone
- Salesforce | Contact | Clean Status
- Salesforce | Contact | Contact Description
- Salesforce | Contact | Data.com Key
- Salesforce | Contact | Department
- Salesforce | Contact | Email

...xt

6. Click "Save".

Edit Action

PRIMARY SETUP LOGIC ADVANCED

Salesforce | Setup complete

A log of each run result can be found in the Individual Responses > Action Log.

Previous **Save**

Advanced Functionality (Optional)
After a Salesforce Update Contact action occurs, data about the action is available for use in

your survey. You can map this data back to fields in Alchemer. These fields are intended to be used with custom scripts or to provide more details on what exactly the query returned.

Edit Action

PRIMARY SETUP LOGIC ADVANCED

Salesforce | Get data back

Select the Salesforce Contact fields you want to use in your survey.

Get this field from Salesforce To update this Alchemer survey field

Choose an option Choose an option

- Action | Metadata | errors
- Action | Metadata | execution_start_time
- Action | Metadata | formatted_response
- Action | Metadata | message
- Action | Metadata | raw_response
- Action | Metadata | status_code

Previous Next

Monitoring a Salesforce Integration Action

A log of each run result can be found in Results > Individual Responses > Action Log.

Select an individual response and then navigate to the Action Log. In the Action Log you can monitor if the action was successful or not.

FAQs

▶ What permissions do I need within Alchemer to set-up and use the Salesforce integration?

▶ This integration doesn't fit my use cases, or I want to provide feedback to Alchemer!

Related Articles