

Alchemer Survey Gladly Integration

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

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

- Push survey data from Alchemer into Gladly, for example to update customer records.
- Pull data from Gladly Customer Records into Alchemer, for use in surveys or email campaigns.

Customer feedback collected through Alchemer seamlessly flows into Gladly, reducing data silos and conserving time and resources that would have otherwise been used on manually inputting feedback into Gladly customer records.

On the Alchemer-side, this integration leverages data from Gladly records to create customized surveys tailored at the customer level. This personalized approach enables you to gather more relevant and targeted insights that lead to a better understanding of your customers' preferences and your overall customer experience.

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

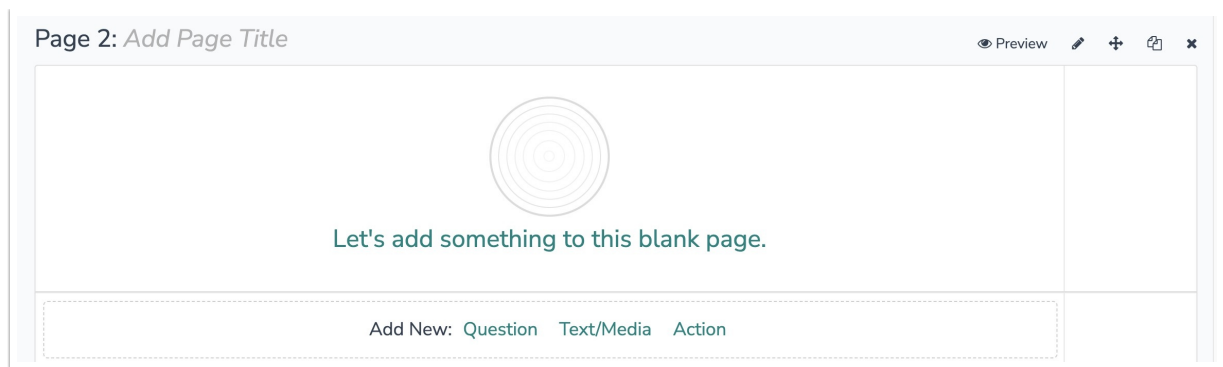
- Run a Customer Experience Survey in Alchemer and automatically update customer records in Gladly when that customer provides feedback.
- Bring in data from Gladly Customer Records to personalize surveys sent through Alchemer.

Integration Set-Up

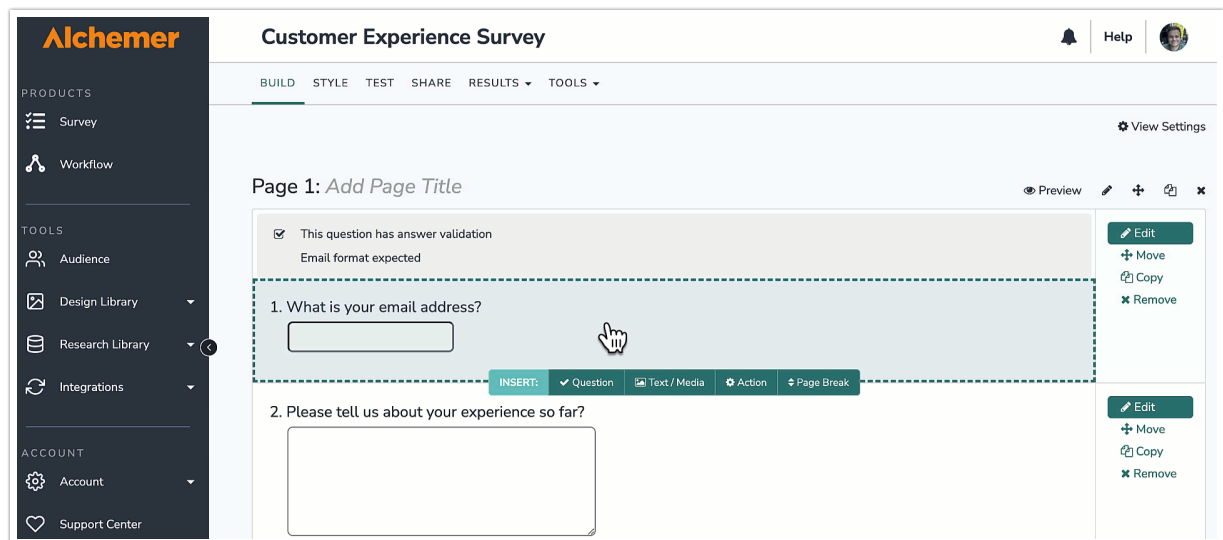
Adding an Integration Action

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

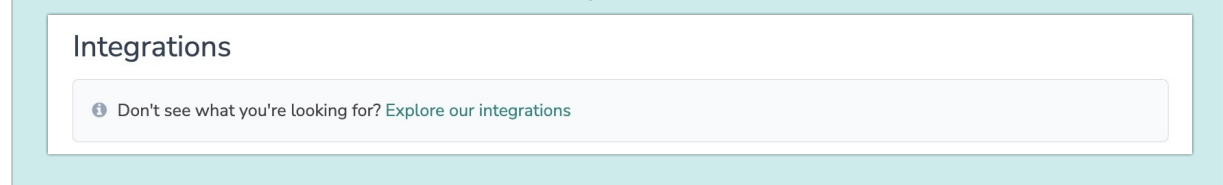
You cannot add this Integration Action to the first page of the survey.



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



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



4. Select the action you would like to perform:

- Update Customer: Automatically update a customer record in Gladly with survey response data from Alchemer.
- Get Customer: Look up Gladly Customer Records by email, customer ID, or other field. Then pull information from those customer records into a survey or email campaign.

Edit Action

PRIMARY SETUP

LOGIC

[< Back](#)

Select Action

Select the action you would like to perform.

Update Customer

Update a Gladly Customer record

Get Customer

Get a Gladly Customer record

Cancel

Next

Configuration: Update Customer Record

Before configuring the Gladly Integration action you will need:

- Your Gladly Login
- Fields in this survey that will contain the data used to lookup the Gladly customer record
- Fields in this survey that contain the data you want to use to update the Gladly customer

1. Select "Update Customer".

Edit Action

PRIMARY SETUPLOGIC

< Back

Select Action

Select the action you would like to perform.

Update Customer

Update a Gladly Customer record

Cancel

Next

2. Hit "Next" on the overview screen.

Edit Action

PRIMARY SETUPLOGIC

Gladly | Update Customer

Update data in a Gladly customer record.

You will need:

- Your Gladly login
- Fields in this survey that will contain the data used to lookup the Gladly customer record
- Fields in this survey that contain the data you want to use to update the Gladly customer

Need help? [Learn more](#)

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3. Connect your Gladly account.

Edit Action

PRIMARY SETUP
LOGIC

Gladly | Authentication

Connect to your Gladly account.

+

Gladly connected
 [blurred text]

v

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4. **Optional:** If your customer records in Gladly have custom attributes and you would like to be able to use those attributes with this integration, provide an email address associated with a Gladly customer record.

This sample record will provide the template for Alchemer to pull in your list of Gladly custom attributes. These custom attributes will appear as Gladly fields in the dropdown list in Step #6. You can map fields in Alchemer to the corresponding custom attributes in Gladly, and update them with survey data.

Edit Action

PRIMARY SETUP
LOGIC

Gladly | Custom attributes

Because you may have customized Gladly, we can get an example customer record from Gladly to get your list of custom attributes.

- Enter an email address below for the Gladly customer record you wish to use as the template.
- This is optional if you do not use custom attributes.

Gladly customer email*(optional)*

<empty string>

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5. Select the field in this survey that you want to use to find the specific customer record in Gladly.

'Customer ID' or 'Customer Email' will often make the most sense, but you can use any of the other fields listed in the drop-down list.

Edit Action

PRIMARY SETUPLOGIC

Gladly | Find the Gladly Record

We need to find the customer record to update when the survey runs.

Select the fields in this survey you want to use to find the specific customer record in Gladly.

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

Match this Alchemer field value

to a value in this Gladly field

Choose an option

Choose an option

Add a new mapping

*Only one field can be used to search.

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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 Gladly and used as [Merge Codes](#) in your survey.

6. Map fields in Alchemer to corresponding fields in Gladly.

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

Any custom attributes brought in during Step #4 will appear as fields in the Gladly field dropdown menu.

Edit Action
PRIMARY SETUP
LOGIC

Gladly | Update Gladly customer with survey data
Choose the survey data you want to use to update the Gladly customer

Use data from this Alchemer field
2. Please tell us about your experience so far? (id: 3)

To update this Gladly field
Choose an option
Gladly | Customer | address
Gladly | Customer | externalCustomerId
Gladly | Customer | name

Add a new mapping

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Optional: Get Data Back About the Record Update Action

After a Gladly Customer Record Update action occurs, data about the action is available for use in your survey. You can map this data back to fields in Alchemer.

For example, if there is an error in the action you can skip the rest of the survey questions for that respondent.

Edit Action
PRIMARY SETUP
LOGIC

Gladly | Get data back
You can get data back about the update to use in your survey.
This is optional.

Use data from the customer update
Action | Metadata | errors
Action | Metadata | status_code

To update this Alchemer survey field
Update Record Metadata: Error (id: 6)
Update Record Metadata: Status Code (id: 7)

Add a new mapping

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7. When complete, click "Save" to finalize the Integration.

Configuration: Get Customer Record

Before configuring the Gladly Integration action you will need:

- Your Gladly Login
- Fields in this survey that will contain the data used to lookup the Gladly customer record

1. Select "Update Customer".

Edit Action

PRIMARY SETUPLOGIC

[← Back](#)

Select Action

Select the action you would like to perform.

Update Customer
Update a Gladly Customer record

Get Customer
Get a Gladly Customer record

Cancel

Next

2. Hit "Next" on the overview screen

3. Connect your Gladly account.

Edit Action

PRIMARY SETUPLOGIC

Gladly | Authentication

Connect to your Gladly account.

Gladly connected

Walter Parker Gladly account

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4. **Optional:** If your customer records in Gladly have custom attributes and you would like to be able to use those attributes with this integration, provide an email address associated with a Gladly customer record.

This sample record will provide the template for Alchemer to pull in your list of Gladly custom attributes. These custom attributes will appear as Gladly fields in the dropdown list in Step #6. You can map fields in Alchemer to the corresponding custom attributes in Gladly, and update them with survey data.

Edit Action

PRIMARY SETUPLOGIC

Gladly | Custom attributes

Because you may have customized Gladly, we can get an example customer record from Gladly to get your list of custom attributes.

- Enter an email address below for the Gladly customer record you wish to use as the template.
- This is optional if you do not use custom attributes.

Gladly customer email^(optional)

<empty string>

5. Select the field in this survey that you want to use to find the specific customer record in Gladly. 'Customer ID' or 'Customer Email' will often make the most sense, but you can use any of the other fields listed in the drop-down list.

Edit Action

PRIMARY SETUPLOGIC

Gladly | Find the Gladly Record

We need to find the customer record to update when the survey runs.

Select the fields in this survey you want to use to find the specific customer record in Gladly.

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

Match this Alchemer field value

to a value in this Gladly field

1. Please provide your email address: (id: 4)

Gladly | Customer | email

Add a new mapping

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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 Gladly and used as [Merge Codes](#) in your survey.

6. Map fields in Gladly to corresponding fields in Alchemer.

If you selected **Get Gladly Customer Records** as your action, you will map a Gladly field to a corresponding field in Alchemer. This will pull in data from an existing field in Gladly and update the corresponding field in Alchemer.

Edit Action

PRIMARY SETUP

LOGIC

Gladly | Get data back

Select the Gladly Customer fields you want to use in your survey.

Get this field from Gladly

To update this Alchemer survey field

Gladly | Customer | name

First Name (id: 5)

Add a new mapping

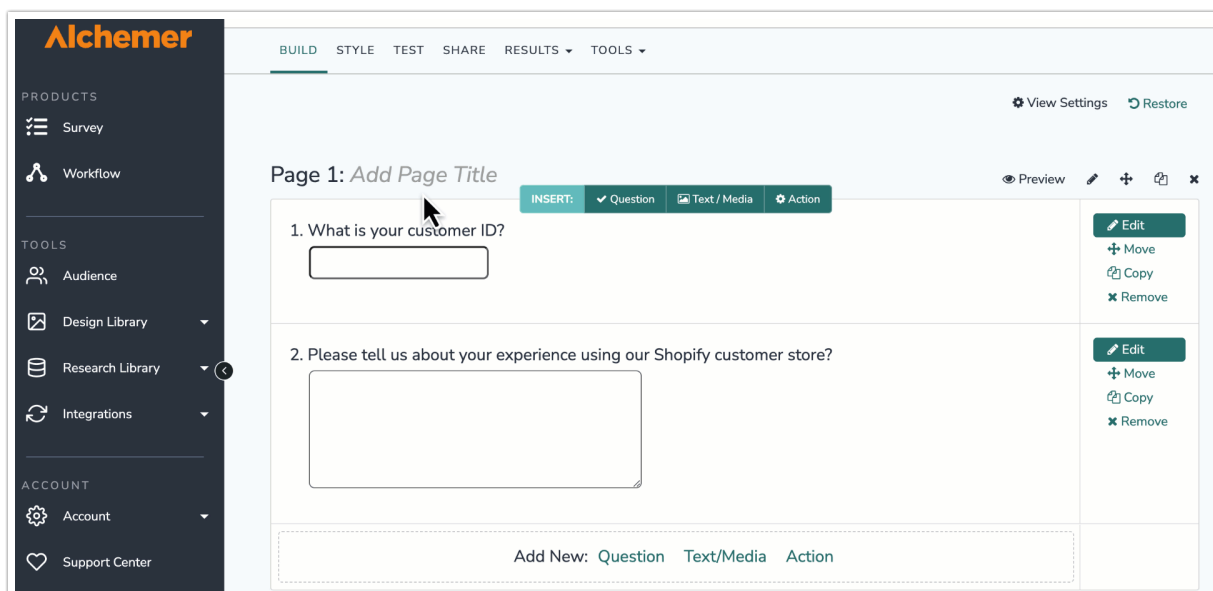
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7. Hit "Save" to complete the integration set up.

Monitoring a Gladly 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.

Response #1

DATA

DETAILS

ACTION LOG

DATA QUALITY

Need Help?

Shopify

Submitted: 2024-02-07 15:14:03

Input:
type: pull
solution_id: 0751d6d1-0f4a-499a-8bbd-f51313bd247a
field_mappings:
 Shopify | Customer | id: 8443948564757
 Shopify | Customer | note: Overall, I love your shopping experience. However, the cart checkout keeps glitching and I have to input my credit card details multiple times.

Output:
solutionIntegrationId: 0751d6d1-0f4a-499a-8bbd-f51313bd247a
trayResponse:
 status_code: 200
 message: Successfully found Shopify customer ID 8443948564757 with query: id:8443948564757. Updated Shopify customer ID 8443948564757 with request: {"customer":{"note":"Overall, I love your shopping experience. However, the cart checkout keeps glitching and I have to input my credit card details multiple times. "}} Execution start time: 2024-02-07T20:14:00.929Z Log: https://app.tray.io/workflow/2cc118c9-a0b5-4c2c-b35a-f32cfba57393/logs/c7f11979-79d1-3120-aa3b-34c4116030f22024-02-07T20:14:00.929Z

Download

Profile Report

Newer

Older

Done

FAQs

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

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

Related Articles
