Salesforce Integration Setup & FAQ

> The Salesforce Integration is available as an add-on. If you are interested in the Salesforce Integration, please contact us for additional information.

Using the Alchemer Salesforce integration you can pull information from and push information to Salesforce.

> Please fill out our request form to be notified of critical updates/changes to the Alchemer Salesforce integration.

Salesforce Integration Action Options

You can set up Alchemer Salesforce integration to do any of the following actions within your surveys:

Pull Data - When pulling data from Salesforce you can identify a given record and pull information associated with that record. This data can then be stored, displayed, used, and reported on in Alchemer. Learn more in our Salesforce Pull Action Tutorial.

Push Data - Pushing data simply means sending data to Salesforce. You can leverage logic options to push to different Salesforce objects under different circumstances. Learn more in our Salesforce Push Action Tutorial.

- **Upsert -** If you have a Salesforce ID, the ID will be used to update an existing record during an upsert. If an ID doesn't exist, a new record will be created. An upsert is a conditional action: update if it exists, insert if it doesn't.
- **Insert** - Insert is the term used for creating a new record. An identifier is not mapped in this case as it doesn't exist.
- **Update** - An update is just that, an update of an existing record. As such, an ID field or unique identifier is required.

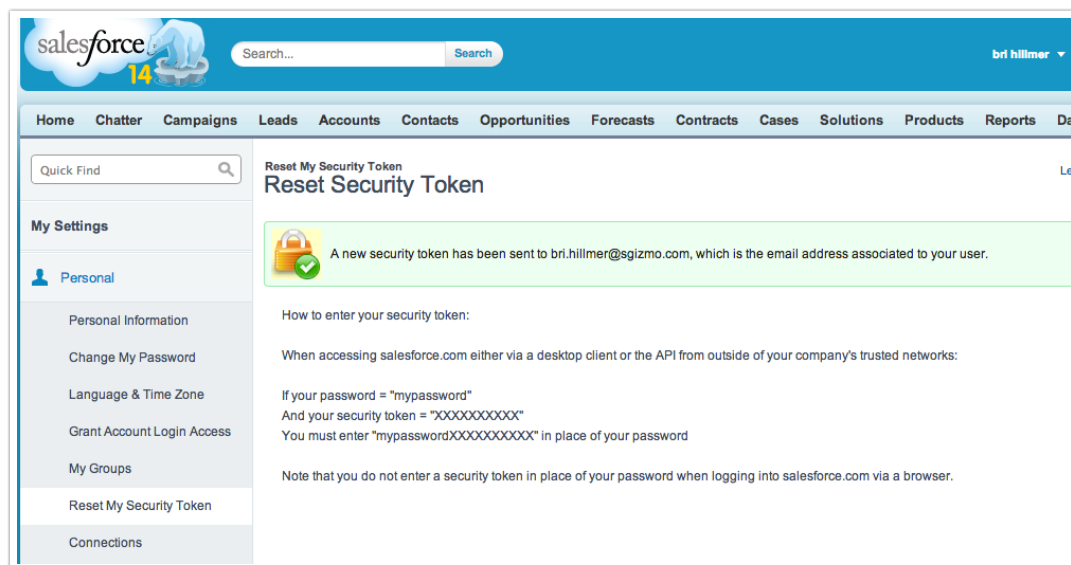## Set Up the Salesforce Integration

Requirements for integrating Alchemer with Salesforce:

- An Enterprise or Unlimited edition of Salesforce including person accounts (these are paid accounts - our integration will not work with a Demo account)
- Alchemer Admin User
- Salesforce Admin or have access to the admin
- Must have access to the API in Salesforce
- Must know or be able to obtain your Salesforce Security Token

Getting Your Salesforce Security Token

You'll need your Salesforce password and security token in order to integrate with Alchemer. If you already know both you can skip to the next step. It is important to note that each time you change your Salesforce password your security token will update.

1. Log in to Salesforce.

2. In Salesforce, click your username and click the dropdown to get to the My Settings. Go to Personal > Reset My Security Token and then click the Reset My Security Token button.

3. This will send an email with your security token.

Integrating Your Salesforce and Alchemer Accounts

1. From the Left Hand Navigation Menu, go to Integrations > Date Connectors .

2. Scroll down to the Enterprise Level integration section and click Configure next to the Salesforce option.

3. Enter an account label (useful for identifying multiple Salesforce Accounts in Alchemer) and your Production Credentials. For the Password + Security Token field you must enter the password and security token together with no spaces. If you're just getting started and wish to only use your sandbox for testing you can leave the production credentials blank and enter only the sandbox credentials.

4. (Optional) Set a Default Object if you wish. The default object you specify will be selected by default when creating Salesforce actions. Often Alchemer Salesforce Integration users are only working with an object or two in Salesforce; we created this option to prevent you from having to scroll through the long list of possible objects when setting up Salesforce actions in your surveys.

5. (Optional) If you wish to receive an email when there is a problem with your authentication credentials, enter your email address (and/or the email address of others you wish to notify) in the

Email Alerts field.

6. (Optional) If you have a Salesforce sandbox account enter **Sandbox Credentials**; this is optional but nice set up if you have it as we'll use the sandbox when recording test responses. Learn more about integrating with sandboxes.

Once you save your Salesforce credentials the system will check to make sure that it can communicate with Salesforce. You'll see a green checkmark if communication is successful. If you see anything other than a green checkmark double check that you entered your credentials correctly.

Integrating with Salesforce Sandboxes

If you have a Salesforce Sandbox account that you'd like to integrate with for testing purposes you can do so by entering your Salesforce sandbox account credentials when setting up your Salesforce integration.

Go to **Integrations > Data Connectors**. And add a new or edit an existing Salesforce integration.

What do I need to know about integrating with a Sandbox Account?
Test responses will always use a sandbox account if the credentials are present. Test responses

include:

- Any response recorded via the **New Test Response** or **Invite Others to Test** buttons on the **Test** tab.
- Any response recorded via the **Invite Others to Test** option in **Build > Preview**.
- Any response recorded via **Build > Preview** that is selected to be recorded.

If you wish to test email campaign responses with your sandbox account you will need to delete your Salesforce production credentials. You will also need to record live email campaign responses. We recommend creating a test email campaign for this purpose.

Only test responses will use the sandbox credentials. The purpose of a sandbox is to allow you to experiment with custom fields, interdependencies, and such. However, often the relationship between objects may be different in these environments. If you need to test in your production account record a live response.

FAQ & Troubleshooting

➕   **Can I integrate with a Salesforce Person Account?**
➕   **Can I map a File Upload question?**
➕   **Is there a limit to the information in one action I can pass?**
➕   **I'd prefer to push a link to the Alchemer response or just a unique identifier for the response to Salesforce rather than the data. How can I do this?**
➕   **Can I pull Salesforce data into Alchemer if I have multiple contact records with the same email address?**
➕   **International Characters in Salesforce**
➕   **Passing Semi-Colon-Separated Checkbox Questions**
➕   **Actions not Pushing Data to Salesforce?**
➕   **Integration won't connect?**
➕   **An Error?! But why?**

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