

Crash Course with a Salesforce Developer Account

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

If you would like to test out Salesforce with your Alchemer account, an easy way to do so is with a handy dandy Salesforce Developer account, which allows for one user and is also free of charge.

This article is intended for users wanting to easily test the waters with our integration. It is not intended for users who are familiar with Salesforce or have an existing Salesforce account. Note: We do not support Salesforce. If you have any trouble with the Salesforce side of things you will need to contact their support team!

Creating an Account

To do so, simply head over to <https://developer.salesforce.com/> and hit the Sign Up button up at the top. Fill out the form to create your account.

Once you've confirmed your email address and created a password, you are officially in and greeted with the full majesty of the Salesforce dashboard. Learn it, live it, love it.

Get A Free Developer Environment

Your username should be in the form of an email address, for example: user@domain.com.

I have read and agreed to the [Master Subscription Agreement](#)

Sign me up >

The screenshot shows the Salesforce1 Setup interface. At the top, there's a navigation bar with the Salesforce logo, a search bar, and user information (Scrooge McDuck). Below the navigation bar is a main menu with categories like Home, Chatter, Campaigns, Leads, Accounts, Contacts, Opportunities, Forecasts, Contracts, Orders, Cases, Solutions, Products, Reports, and Dashboards. A prominent banner at the top reads "Take Salesforce with you wherever you go. Run your business from any mobile device with the Salesforce1 Mobile App." Below the banner is a "Getting Started" section with a "Build App" button and a "Recent Items" table. The "Recent Items" table has columns for Name, Type, and Object. A "Quick Links" section is also visible, listing various administrative tasks like "App Quick Start", "Schema Builder", and "New custom object". On the right side, there are sections for "Resources" and "Featured Content".

There's a lot of content here on this page, but essentially what we're actually looking at is the Setup screen for your account. If you click on the link at the top right that says Setup at the top, you'll see the exact same thing. There's a lot here that we're not really concerned about for a basic introduction to Salesforce. Let's get right into the stuff that matters.

Salesforce Methodology & Terminology

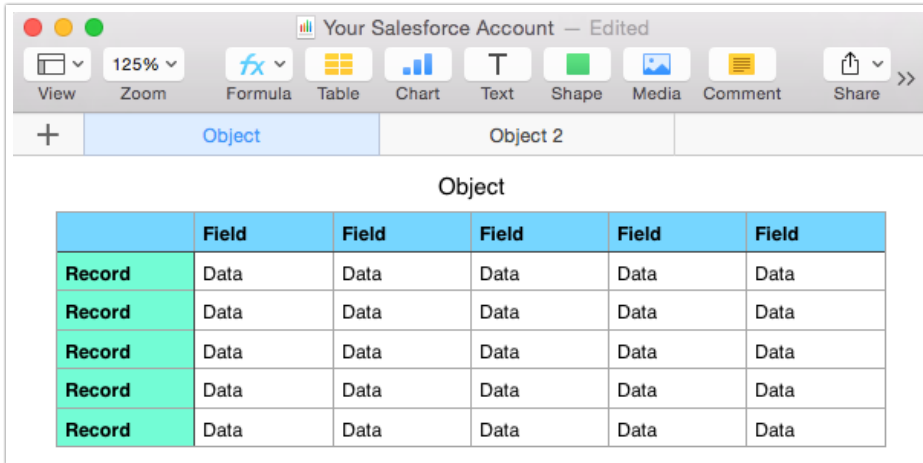
You can think of your data in Salesforce as essentially a database, containing a number of tables (think spreadsheets) which consist of rows and columns. You can think of these with the following vocabulary for Salesforce:

Object: This is the equivalent of the table or spreadsheet. Salesforce has lots of these built in: an *Accounts* object, a *Contacts* object, etc.

Field: This is the equivalent of a column in the table. In the *Contacts* object, you will find fields for contact data such as *Email Address*, *First Name*, *Last Name*, and *Organization*.

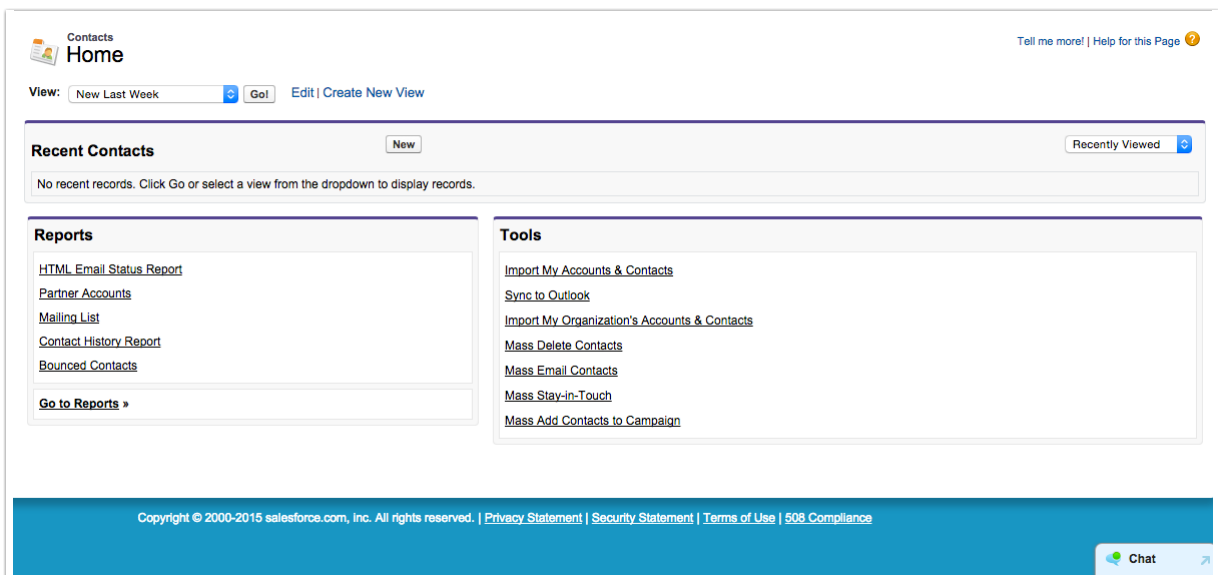
Record: This is the equivalent of a row in the table. A contact is really just a record in the *Contacts* object, collecting data associated with each field in the object.

You can visualize this like so



Standard Objects

Salesforce has a number of built-in objects complete with pre-configured fields and records. Let's check out the *Contacts* object. At the top of the Setup screen is a navbar for quickly getting to any of your objects (or the ones you need the quickest access to). When you click on "Contacts" you'll be presented with... not much.



You want to go to a *view* so you can see your contacts. In the dropdown next to "View" select "All Contacts" and finally you'll be presented with a table full of contacts you didn't actually create.

All Contacts Edit | Delete | Create New View List Feed Print Help

New Contact Add to Campaign Filter A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

<input type="checkbox"/>	Action	Name ↑	Account Name	Title	Phone	Email	Contact Owner Alias
<input type="checkbox"/>	Edit Del +	Barr, Tim	Grand Hotels & Resorts Ltd	SVP, Administration and Fina...	(312) 596-1000	barr_tim@grandhotels.com	SMcDu
<input type="checkbox"/>	Edit Del +	Bond, John	Grand Hotels & Resorts Ltd	VP, Facilities	(312) 596-1000	bond_john@grandhotels.com	SMcDu
<input type="checkbox"/>	Edit Del +	Boyle, Lauren	United Oil & Gas Corp.	SVP, Technology	(212) 842-5500	lboyle@uog.com	SMcDu
<input type="checkbox"/>	Edit Del +	D'Cruz, Liz	United Oil & Gas, Singapore	VP, Production	(650) 450-8810	ldcruz@uog.com	SMcDu
<input type="checkbox"/>	Edit Del +	Davis, Josh	Express Logistics and Transport	Director, Warehouse Mgmt	(503) 421-7800	j.davis@expressl&t.net	SMcDu
<input type="checkbox"/>	Edit Del +	Forbes, Sean	Edge Communications	CFO	(512) 757-6000	sean@edge.com	SMcDu
<input type="checkbox"/>	Edit Del +	Frank, Edna	GenePoint	VP, Technology	(650) 867-3450	efrank@genepoint.com	SMcDu
<input type="checkbox"/>	Edit Del +	Gonzalez, Rose	Edge Communications	SVP, Procurement	(512) 757-6000	rose@edge.com	SMcDu
<input type="checkbox"/>	Edit Del +	Green, Avi	United Oil & Gas Corp.	CFO	(212) 842-5500	agreen@uog.com	SMcDu
<input type="checkbox"/>	Edit Del +	Grev, Jane	University of Arizona	Dean of Administration	(520) 773-9050	jane_grav@uoa.edu	SMcDu
<input type="checkbox"/>	Edit Del +	James, Ashley	United Oil & Gas, UK	VP, Finance	+44 191 4956203	ajames@uog.com	SMcDu
<input type="checkbox"/>	Edit Del +	Levy, Barbara	Express Logistics and Transport	SVP, Operations	(503) 421-7800	b.levy@expressl&t.net	SMcDu
<input type="checkbox"/>	Edit Del +	Llorac, Jake	sForce				SMcDu
<input type="checkbox"/>	Edit Del +	Nedaerk, Siddhartha	sForce				SMcDu
<input type="checkbox"/>	Edit Del +	Pavlova, Stella	United Oil & Gas Corp.	SVP, Production	(212) 842-5500	spavlova@uog.com	SMcDu
<input type="checkbox"/>	Edit Del +	Ripley, Tom	United Oil & Gas, Singapore	Regional General Manager	(650) 450-8810	triplej@uog.com	SMcDu
<input type="checkbox"/>	Edit Del +	Rogers, Jack	Burlington Textiles Corp of A...	VP, Facilities	(336) 222-7000	jrogers@burlington.com	SMcDu
<input type="checkbox"/>	Edit Del +	Song, Arthur	United Oil & Gas Corp.	CEO	(212) 842-5500	asong@uog.com	SMcDu

1-20 of 20 0 Selected « Previous Next » Chat

Click on any record in this table and you'll see the full contact card, and you can make changes to the individual contact or delete them, etc.

Custom Objects

But of course Salesforce's built-in objects will only get you so far, so let's create our own. Back in Setup (remember that you can always get back to the Setup screen by clicking "Setup" up in the top right). When you're there find "Create" in the navbar on the left and then click "Objects" under that.

The screenshot shows the Salesforce navigation menu on the left and the dashboard on the right. The 'Objects' menu item is highlighted with a red box and an orange arrow. The dashboard includes sections for 'Recent Items', 'Quick Links', and 'Community'.

Name	Type	Object
Recent Items <small>beta</small>		
Quick Links		
Tools	Users	App
App Quick Start	New user	Manage apps
Schema Builder	Add multiple users	Manage profile
New custom object	Reset users' passwords	Enable Chatter
Security		
Data		
New profile	Import accounts & contacts	
New permission set	Import custom objects	
Add roles	Mass delete records	

Community

Resources
Collaborate & Discuss
Join the conversation.

Find Answers
Post your questions to the Community.
[Ask a Question](#)

Contribute Ideas
Share & vote for ideas.
[Post an Idea](#)

[Release Resources](#)

You'll see that you have no custom objects to speak of, which makes sense. So go ahead and hit the "New Custom Object" button. We can now create our new object. The required components are marked red. You really only have to worry about the Singular and Plural object names. Hit Save.

You'll now be looking at your new object, including the standard fields that came along with it just by virtue of being created. You'll probably want to create fields for your object, though, so let's do that.

Custom Fields

A custom object won't get you very far without fields to populate, so let's create a new field in our object. Scroll down a bit when looking at your object and under "Fields" hit "New".

Custom Object **Person Who Wants My Gold** Help for this Page ?

[Standard Fields \[4\]](#) |
 [Custom Fields & Relationships \[0\]](#) |
 [Validation Rules \[0\]](#) |
 [Page Layouts \[1\]](#) |
 [Field Sets \[0\]](#) |
 [Compact Layouts \[1\]](#) |
 [Search Layouts \[4\]](#) |
 [Buttons, Links, and Actions \[8\]](#) |
 [Record Types \[0\]](#) |
 [Apex Sharing Reasons \[0\]](#) |
 [Apex Sharing Recalculation \[0\]](#) |
 [Object Limits \[10\]](#)

Custom Object Definition Detail


[Edit](#) [Delete](#)

		Description
Singular Label	Person Who Wants My Gold	
Plural Label	People Who Want My Gold	Enable Reports <input type="checkbox"/>
Object Name	Person_Who_Wants_My_Gold	Track Activities <input type="checkbox"/>
API Name	Person_Who_Wants_My_Gold__c	Allow in Chatter Groups <input type="checkbox"/>
		Allow Sharing <input checked="" type="checkbox"/>
		Allow Bulk API Access <input checked="" type="checkbox"/>
		Allow Streaming API Access <input checked="" type="checkbox"/>
		Track Field History <input type="checkbox"/>
		Deployment Status Deployed
		Help Settings Standard salesforce.com Help Window
Created By	Scrooge McDuck, 7/9/2015 12:06 PM	Modified By Scrooge McDuck, 7/9/2015 12:07 PM

Standard Fields

[Standard Fields Help ?](#)

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	Created By	CreatedBy	Lookup(User)		
	Last Modified By	LastModifiedBy	Lookup(User)		
Edit	Owner	Owner	Lookup(User,Queue)		<input checked="" type="checkbox"/>
Edit	People Who Want My Gold Name	Name	Text(80)		<input checked="" type="checkbox"/>



Custom Fields & Relationships

[New](#) [Field Dependencies](#) [Custom Fields & Relationships Help ?](#)

No custom fields defined.

Related Lookup Filters

No related lookup filters defined.

Validation Rules

[New](#) [Validation Rules Help ?](#)

No validation rules defined.

[Chat](#)

When you do you'll be presented with several options for the *data type*, which is to say, the kind of data that this field will accept. This is important because if you try to populate the field with data that doesn't fit the model, it won't work. [Click here](#) for a breakdown of the different data types.

Note: In Alchemer trying to push incompatible data can mean a completely broken push action.

Select the datatype that applies to your field. Hit Next.

In step 2 you will have to name your field. Hit Next.

In step 3 you can set security on the field for visibility, but since you will be the only user on this Salesforce account, don't worry about it. Hit Next.

Confirm your field by Saving.

Person Who Wants My Gold
New Custom Field

Step 2. Enter the details

Field Label [i](#)

Please enter the maximum length for a text field below.

Length

Field Name [i](#)

Description

Help Text [i](#)

Required Always require a value in this field in order to save a record

Unique Do not allow duplicate values

- Treat "ABC" and "abc" as duplicate values (case insensitive)
- Treat "ABC" and "abc" as different values (case sensitive)

External ID Set this field as the unique record identifier from an external system

Default Value [Show Formula Editor](#)

Use [formula syntax](#): e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7

If you'd like to create more custom fields feel free to do so.

The last thing we want to do with our custom object is add it to our list of tabs at the top that we can use to view the data. From the Setup screen hit Create => Tabs, then New under "Custom Object Tabs". Select the object we just created and then click through the pages to save it.

Search All Setup... Expand All | Collapse All

Custom Tabs

Help for this Page

You can create new custom tabs to extend salesforce.com functionality or to build new application functionality.

Custom Object Tabs look and behave like the standard tabs provided with salesforce.com. Web Tabs allow you to embed external web applications and content within the salesforce.com window. Visualforce Tabs allow you to embed Visualforce Pages. Lightning Component tabs allow you to add Lightning Components to the navigation menu in Salesforce1. Lightning Page tabs allow you to add Lightning Pages to the navigation menu in Salesforce1.

Custom Object Tabs

[New](#) [What Is This?](#)

Action	Label	Tab Style	Description
Edit Del	People Who Want My Gold	Safe	

Web Tabs

[New](#) [What Is This?](#)

No Web Tabs have been defined

Visualforce Tabs

[New](#) [What Is This?](#)

No Visualforce Tabs have been defined

Lightning Page Tabs

[New](#) [What Is This?](#)

No Lightning Page Tabs have been defined

Administer

- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Email Connect **BETA**
- Email Administration
- Google Apps
- Data.com Administration

Build

- Customize
- Create**
 - Apps
 - Custom Labels
 - Interaction Log Layouts
 - Objects
 - Packages
 - Report Types
 - Tabs**
 - Action Link Templates
- Global Actions
- Workflow & Approvals

Chat

Integrate with Alchemer

Rather than reinvent the wheel I think it's a better idea to just let you follow the instructions in our excellent article on [setting up a Salesforce integration with Alchemer](#).

Push to Salesforce

Create a survey that will map to your Salesforce object's fields.

Set up a push action to add records. You should see your custom object show up in the list. You can then map your survey questions to the object's fields.

Thank You Page: Thank You! ID: 2

Responses are marked as complete when they reach this

Salesforce Action

Salesforce

You have not set up the SalesForce action yet...

ID: 5
Type: Salesforce

Thank you for taking our survey. Your response is very important

ID: 1
Type: Text / Instructions

Send an

LeadShare
LeadStatus
LoginIp
MailmergeTemplate
Name
Note
NoteAndAttachment
OpenActivity
Opportunity
OpportunityCompetitor
OpportunityContactRole
OpportunityFieldHistory
OpportunityHistory
OpportunityLineItem
OpportunityPartner
OpportunityShare
OpportunityStage
Order
OrderHistory
OrderItem
Organization
Partner
PartnerRole
Period
Person_Who_Wants_My_Gold__c
Pricebook2
Pricebook2History
PricebookEntry
ProcessDefinition
ProcessInstance

PRIMARY SETUP
LOGIC
NEED HELP?

Tip: Check out our [SalesForce.com tutorial!](#)

SalesForce.com object type:

This action will be:

Fire action each time page is hit:

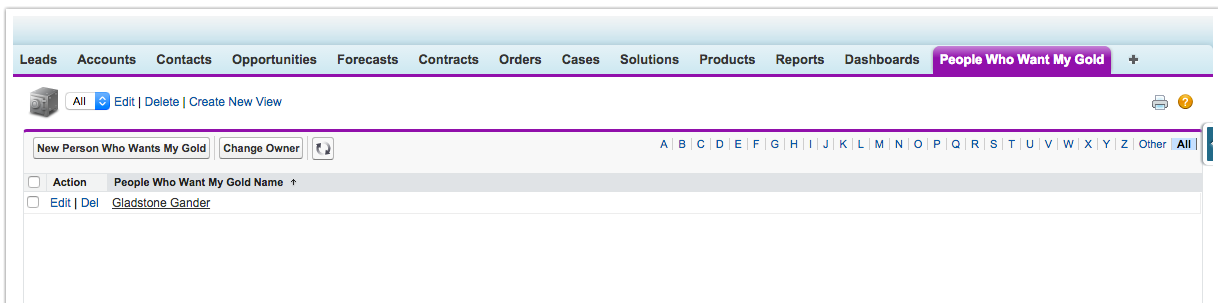
Yes, fire this action each time this page is rendered.

No, only fire this action once for each response.

Fields Mapping:

SurveyGizmo Question	SalesForce Field	Default Value
# 0: Name	Name	✕
# 1: Relationship	Relationship_c	✕

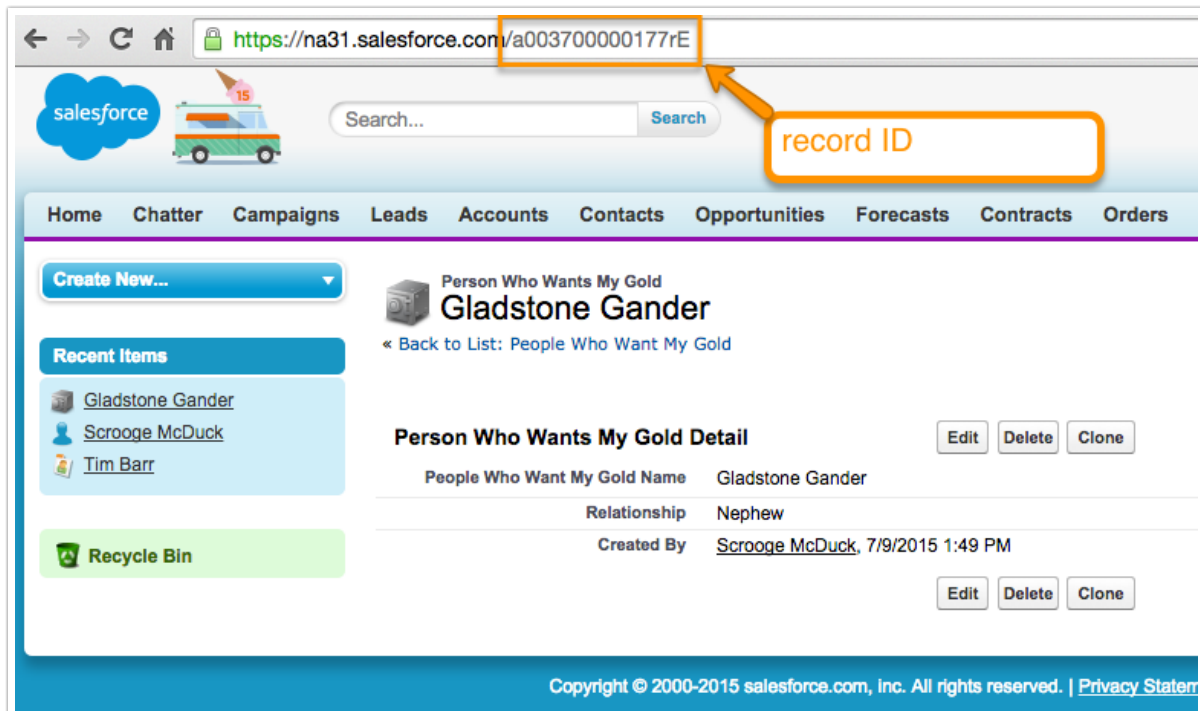
After filling out the survey head back into Salesforce, click on the tab we created earlier for your custom object, and view "All". You should see the record we just created!



Pull from Salesforce

If you'd like to prepopulate your survey with information from Salesforce you can test this out by

clicking on our new record, and you can grab the record ID from the URL, here:



Now in Alchemer on the first page of the same survey, add a Salesforce action that populates the survey. Set it up to communicate with the same object. You'll notice this time around that we have a field to set up a *query*. Remember the *lookups* I mentioned before when talking about tables? This is what this query does. When it says

```
select * from Person_Who_Wants_My_Gold__c where Id = '[url("recordid")]'
```

What that really means is we will pull all records from the Person Who Wants My Gold object where the value for the Id field is equal to the value of our URL variable "recordid". Going back to our table, if we pass the record ID we grabbed earlier from the record we just created, you might imagine the table's logic like so

Scrooge McDuck's Salesforce Account – Edited

View Zoom Formula Table Chart Text Shape Media Comment Share >>

+ People Who Want My Gold Object 2

A B C D

Object

	Id	Name	Relationship
1			
2	a003700000177rE	Gladstone Gander	Nephew
3	a0037000001784V	Beagle Boys	Thieves
4	a0037000001784a	Donald Duck	Nephew
5	a0037000001784f	Magica Da Spell	Nemesis

Text a003700000177rE

So we're looking inside the People Who Want My Gold table for the Id field and then finding the one that matches the value we feed it (by way of the URL variable merge code we added in). At that point, Salesforce returns the record with all of its data. We're populating the Name and Relationship into our survey. So when now when we run through the survey with the following link: <http://survey.alchemer.com/s3/2229617/People-Who-Want-My-Money-Form?recordid=a003700000177rE>

We should see Gladstone's information prepopulated.

When looking at Populate or Update actions in your Alchemer data you will probably see an 18-character record ID instead of a 15-character ID like what we're using. This is fine, they both point to the same record.

Updating Salesforce Records

If we're prepopulating from an existing record then there's a good chance we want to write the information we collect back to the same record. What we can do is grab our record ID in the survey, and then use that record ID to update the record later (or create a new record if no record ID is found).

PRIMARY SETUP
NEED HELP?

Person_Who_Wants_My_Gold_c(s)

This action will be:

Updating records in Salesforce.com

If you are updating or Pulling information, please modify this query to identify the record(s) you want to access:
(You can use Merge Codes).

```
select * from Person Who Wants_My_Gold_c where Id =
'[question("value"), id="8"]'
```

Insert Merge Code

Fire action each time page is hit:

Yes, fire this action each time this page is rendered.

No, only fire this action once for each response.

Fields Mapping:

SurveyGizmo Question	SalesForce Field	Default Value
Name	Name	✕
Relationship	Relationship_c	✕

-- Select Question --

-- Select Field --

Add

Cancel
Save Action

On the first page of our survey let's create a [Hidden Value action](#) and prepopulate it with the same merge code we used earlier, [url("recordid")].

Now on the last page, we need to add a new Salesforce action, this time, to "Update existing records". We'll be setting this one up with a lookup like we did with the Prepopulate action. This time, though we will use a merge code for the hidden value.

We also need to set up our Update and Add actions with logic so that both don't run at the same time. Easy peasy! We'll just set up our new update action so that it runs when the hidden value storing the record id *is answered*. If there's no record ID it won't run. Conversely, we will set up the Add action to run when the hidden value *is not answered*. That should do it.

Logic Rule

Only show this question based on answers to previous questions or other logic conditions

Remove All Logic

record id is answered

+ Add Condition

Hide all subsequent questions on this page

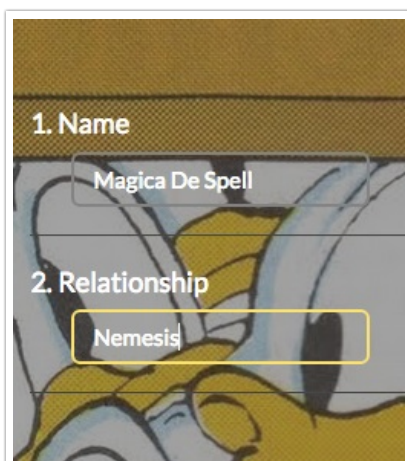
Hide this question by default (mainly used with custom scripting)

Disable Question

Yes

No

Now if we use a link that passes in one of our record IDs we can update the same record with new information. Let's try <http://survey.alchemer.com/s3/2229617/People-Who-Want-My-Money-Form?recordid=a0037000001784f>. It should prepopulate the survey with Magica's information. When we change her relationship and submit the survey, we'll see the updated information in Salesforce right away.

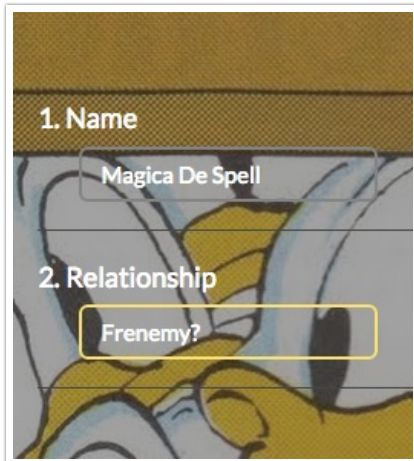


1. Name

Magica De Spell

2. Relationship

Nemesis



Let's check back in with Salesforce to see what happened. Go back to the object's tab in Salesforce and head to the "All" view. I've customized the view (using the Edit button above the table) to show us some more information than would be here by default. But there we go! Magica's been updated.

Action	Record ID ↑	Name	Relationship
Edit Del	a003700000177rE	Gladstone Gander	Nephew
Edit Del	a0037000001784V	Beagle Boys	Thieves
Edit Del	a0037000001784a	Donald Duck	Nephew
Edit Del	a0037000001784f	Magica De Spell	Frenemy?

Conclusion

And that's it, you're now up and running with Salesforce. This only touches the surface of what you can do with Salesforce of course, but you can hopefully take this and run with it for your own needs. Have fun and happy surveying!

Related Articles