

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 SurveyGizmo [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 SurveyGizmo Salesforce integration.

Salesforce Integration Action Options

You can set up SurveyGizmo 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 SurveyGizmo. 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

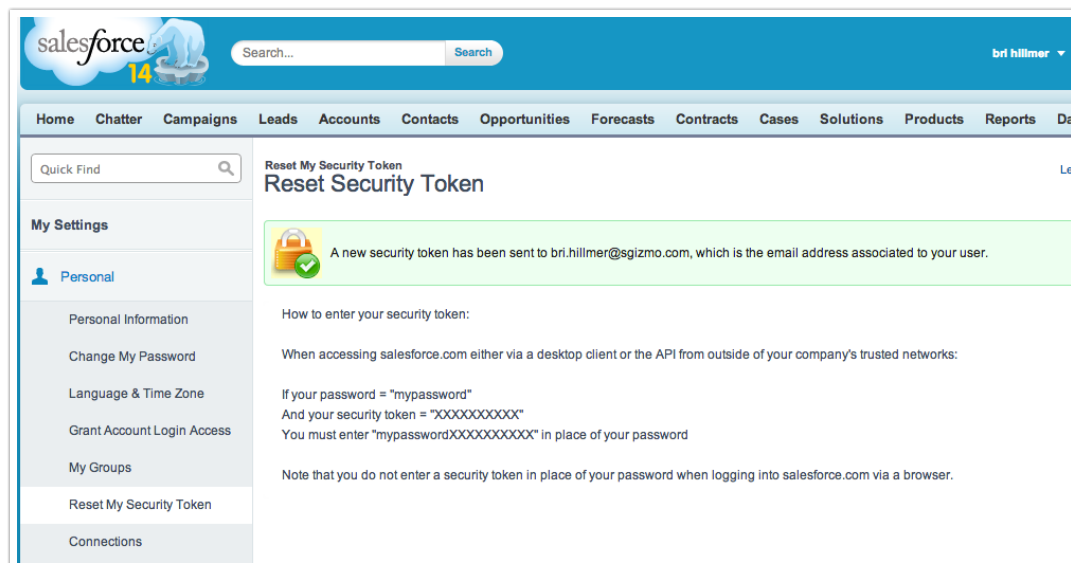
Requirements for integrating SurveyGizmo with Salesforce:

- An Enterprise or Unlimited edition of Salesforce including person accounts (these are paid accounts - our integration will not work with a Demo account)
- SurveyGizmo 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 SurveyGizmo. 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 SurveyGizmo 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 SurveyGizmo) 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 SurveyGizmo 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](#).

Salesforce Info

Enable Account

Enabled
 Disabled

Account Label
Account Label is only used to identify this account within

Primary account

Production Credentials

Username Password + Security Token

Note: Do not include spaces or plus signs

Default Object
Enter valid Production Credentials above to set a Default Object.

Email Alerts
Receive email alerts if S not connect with Salesforce due to an authentication error in a live survey.

salesforce.admin@yourcompany.com, optional@address.com

Sandbox Credentials
Sandbox credentials will automatically be used when testing your survey. [Learn more](#) about Salesforce sandbox accounts.






Username Password + Security Token

Note: Do not include spaces or plus signs

Never Mind Save

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.

Integrations

Current Integrations	Name	Status	Verified	
	Unnamed account	Enabled	✓	Edit Delete
	subkey	Disabled	✗	Edit Delete
	E2.0	Enabled	✓	Edit Delete
	Stripe	Enabled	N/A	Edit Delete
	Google	Enabled	N/A	Edit Delete

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.

Salesforce Info

Enable Account

Enabled
 Disabled

Account Label
Account Label is only used to identify this account

Developer Account

Production Credentials

Username: bri.hillmer@.com Password + Security Token:

Default Object
Default Object will be used when creating new Salesforce Actions.

-- Select an Object --

Sandbox Credentials
Sandbox credentials will automatically be used when testing your survey. [Learn more](#) about Salesforce sandbox accounts.

Username: bri.hillmer@.com Password + Security Token:

Never Mind Save

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 SurveyGizmo 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 SurveyGizmo 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?**

Related Articles