

Alchemer Workflow Salesforce Initiator

The Salesforce initiator is included with Alchemer Workflow. If you are interested in purchasing Alchemer Workflow, please [contact us](#) for additional information.

Overview

Alchemer Workflow's Salesforce initiator combines advanced survey and Workflow capabilities with Salesforce's powerful CRM platform, allowing you to automate business and sales processes and better close the loop with your customers and prospects.

Initiating Workflows in response to Salesforce event changes leads to smoother customer and prospect engagement, while speeding up your sales, onboarding, and support processes.

With the Salesforce initiator, you can:

- Initiate Workflows when Salesforce events occur. The Salesforce initiator can listen to two events types, "On Object Create" and "On Object Update".
- Choose from over 800 Salesforce objects, and initiate Workflows when any of these objects are created or updated. Here are some examples:
 - As a customer success manager, automatically initiate an onboarding Workflow when an Opportunity status is changed to "Won".
 - As a sales manager, automatically initiate a closed-lost analysis Workflow when an Opportunity status is changed to "Lost".
- Utilize pre-built event triggers to initiate Workflows when a Salesforce case is closed, or when an Salesforce Opportunity is Closed-Won or Closed-Lost.

Setup

The user who authenticates the Salesforce Integration with Alchemer must have the following Salesforce permissions:

- API Enabled User
- Customize Application
- Manage Flows
- Run Flows
- Modify All Data
- Modify Metadata

These permissions are required by Salesforce because this initiator automatically creates a

Flow in Salesforce that will trigger the Workflow. These are the permissions needed to create Flows in Salesforce. If you are not comfortable giving these permissions, you can create a Flow on your own and use the [Custom Webhook Initiator](#).

The Salesforce initiator is read-only and will NOT modify any Salesforce data.

Additional Requirements for Opportunity Closed Won or Lost Initiators

Customers using the Salesforce Opportunity Closed Won or Lost Initiators must enable field history for the Stage field for opportunities.

The screenshot shows the Salesforce Setup page for Opportunity Field History. The 'Enable Opportunity Field History' checkbox is checked and highlighted with a red box. Below it, the 'Track old and new values' section lists various fields with checkboxes. The 'Stage' field checkbox is also checked and highlighted with a red box. The page includes a 'Save' button and a 'Cancel' button.

In Salesforce, you can find this setting under Setup > Objects and Fields > Object Manager > Opportunity > Fields & Relationships. Ensure that both the "Stage" box and "Enable Opportunity Field History" box are checked.

1. Create a new Workflow.

The screenshot shows the Alchemer Workflow management interface. The 'Create New Workflow' button is highlighted with a red box. The interface displays a list of workflows with the following data:

Workflow Name	Status	In Progress	Completed	Steps
Gold Demo Certification Process	In Progress	0	2	9
New Webpage Design - Feedback Program	Active	1	0	19
30/60/90 Employee Evaluation	Active	0	0	30

2. Name your Workflow.

Create New Workflow

What would you like to name this Workflow?


Closed Lost Workflow


Cancel


Start Building


3. Select the Salesforce button when choosing a Workflow initiator.


Select Initiator


**Survey Listener**
When a given survey is completed

**Share Link**
When a user clicks on a custom workflow link

**Salesforce**

**Paylocity**

**Zendesk**

**Asana**

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Next

4. Choose the Salesforce initiator that you would like to use.

Configure Initiator

Record updated
Starts the Alchemer Workflow when the selected Salesforce record type is updated.

Record created
Starts the Alchemer Workflow when a Salesforce record of the selected type is created.

Record created or updated
Starts the Alchemer Workflow when a Salesforce record of the selected record type is either created or updated.

Opportunity Closed Won
Starts the Alchemer Workflow when a Salesforce Opportunity is Closed-Won

Opportunity Closed Lost
Starts the Alchemer Workflow when a Salesforce Opportunity is Closed-Lost

Case Closed
Start a new workflow run every time a case is updated to "Closed". Automatically pull in case and contact fields to set up logic or merge codes.

[Previous: Select Initiator](#)

Next

5. Authenticate your Salesforce account. For additional guidance on authenticating a Salesforce account with Alchemer, click [here](#).


The screenshot shows a dialog box titled "Configure Initiator" with a sub-header "Authentication". Below the sub-header, it says "Select a Salesforce account to connect to." There is a dropdown menu showing "Salesforce connected" with a small Salesforce logo and a chevron icon. Below the dropdown is a button labeled "Add a new account". At the bottom right, there are "Cancel" and "Next" buttons. A progress indicator at the bottom left shows two dots, with the second dot being active.

6. Depending on the selected Salesforce initiator, you may be required to choose specific records and fields for your initiator to listen to. Complete this section and continue.

The screenshot shows a dialog box titled "Configure Initiator" with a sub-header "Select a record type*". Below this is a dropdown menu showing "Contact". Below that is another sub-header "Select at least one field*". Under this, there is a section labeled "Field" with a dropdown menu showing "Choose an option". At the bottom right, there are "Previous" and "Finish" buttons. A progress indicator at the bottom left shows two dots, with the second dot being active.

The records and fields available will vary depending on your level of access in Salesforce.


7. Click the “Finish” button to complete the Salesforce initiator step. Then click “Save”.

 **Configure Initiator**


Salesforce Opportunity Closed Lost

Thank you

Previous **Finish**



 Previous: Configure Initiator

Save

 **Configure Initiator**


Salesforce Opportunity Closed Lost

Thank you

 **Integration successfully setup!** 

Close this window now

Previous **Finish**

 Previous: Configure Initiator

Save

Merge Codes

When the webhook fires, Salesforce will pass the following fields to Alchemer Workflow. After configuring this initiator, you can use these fields in merge codes, logic, and other Workflow features.

For more information on how to use these merge codes in your Workflow, [check out this article](#).

- ⊕ Fields for Salesforce initiator - Case Closed
- ⊕ Fields for Salesforce initiator - Opportunity Closed Won and Opportunity Closed Lost
- ⊕ Fields for BigCommerce initiator - Case Closed

FAQs

▷ What permissions do I need within Salesforce to set-up and use the Salesforce initiator?

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

▷ Can multiple Workflows initiate off the same Salesforce initiator?

▷ This initiator doesn't fit my use cases, or I want to provide feedback to the Alchemer Product Team!

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