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

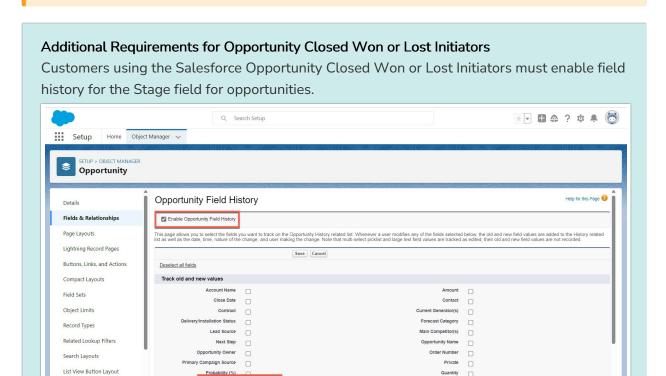
The user who authenticates the Salesforce Integration with Alchemer must have the following Salesforce permissions:

- 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.

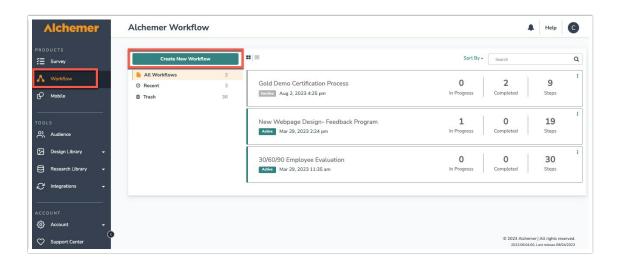
The Salesforce initiator is read-only and will <u>NOT</u> modify any Salesforce data.



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.

Stage 🔽

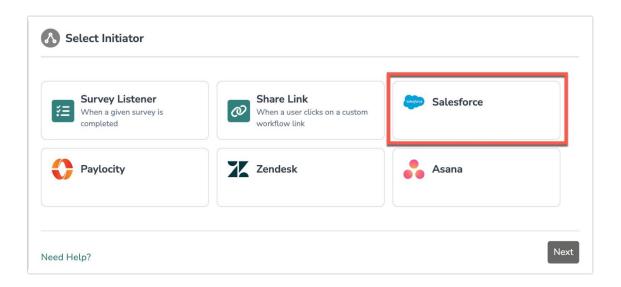
1. Create a new Workflow.



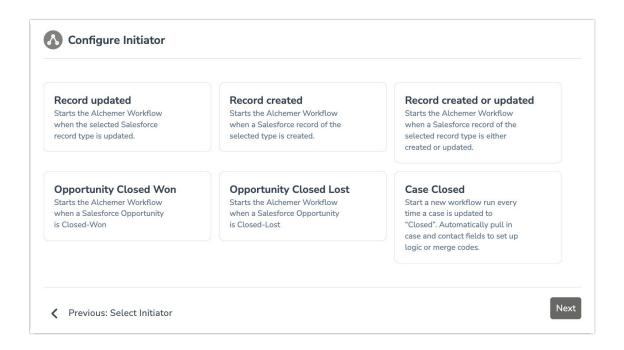
2. Name your Workflow.



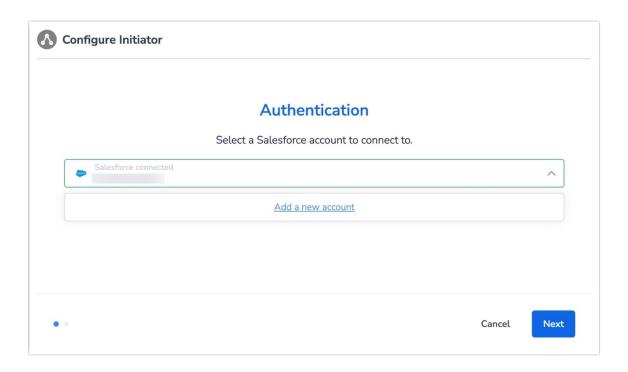
3. Select the Salesforce button when choosing a Workflow initiator.



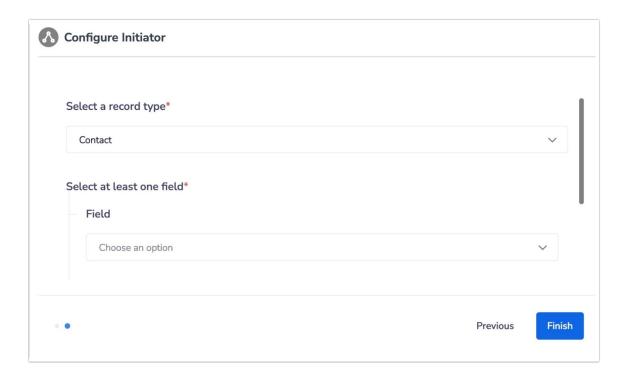
4. Choose the Salesforce initiator that you would like to use.



5. Authenticate your Salesforce account. For additional guidance on authenticating a Salesforce account with Alchemer, click here.

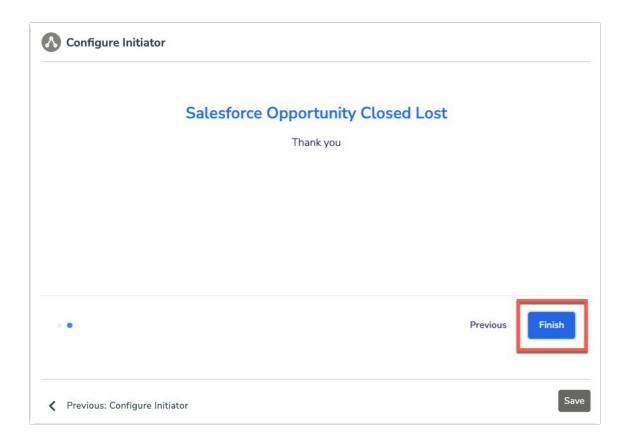


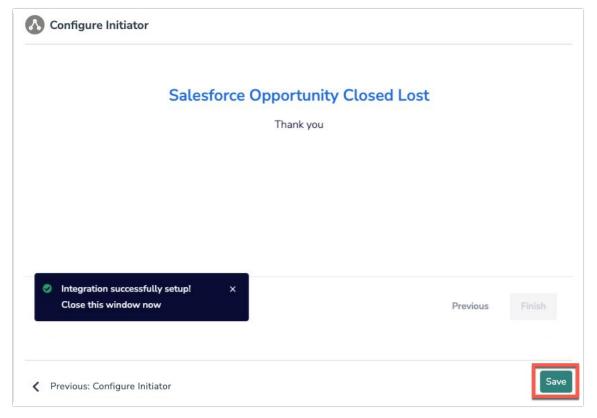
6. Depending on the selected Salesforce initiator, you may be required to choose specific records and fields for your initiator to listen to. Complete this section and continue.



The 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".





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?
- D Can multiple Workflows initiate off the same Salesforce initiator?
- P This initiator doesn't fit my use cases, or I want to provide feedback to the Alchemer Product Team!

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