Alchemer Workflow Salesforce Push/Pull Integration

This integration is included with the existing Alchemer Salesforce integration. There is no additional cost for customers that already have access to the Salesforce integration and Alchemer Workflow.

If you do not have the Salesforce integration or Alchemer Workflow, and are interested, please contact us for additional information.
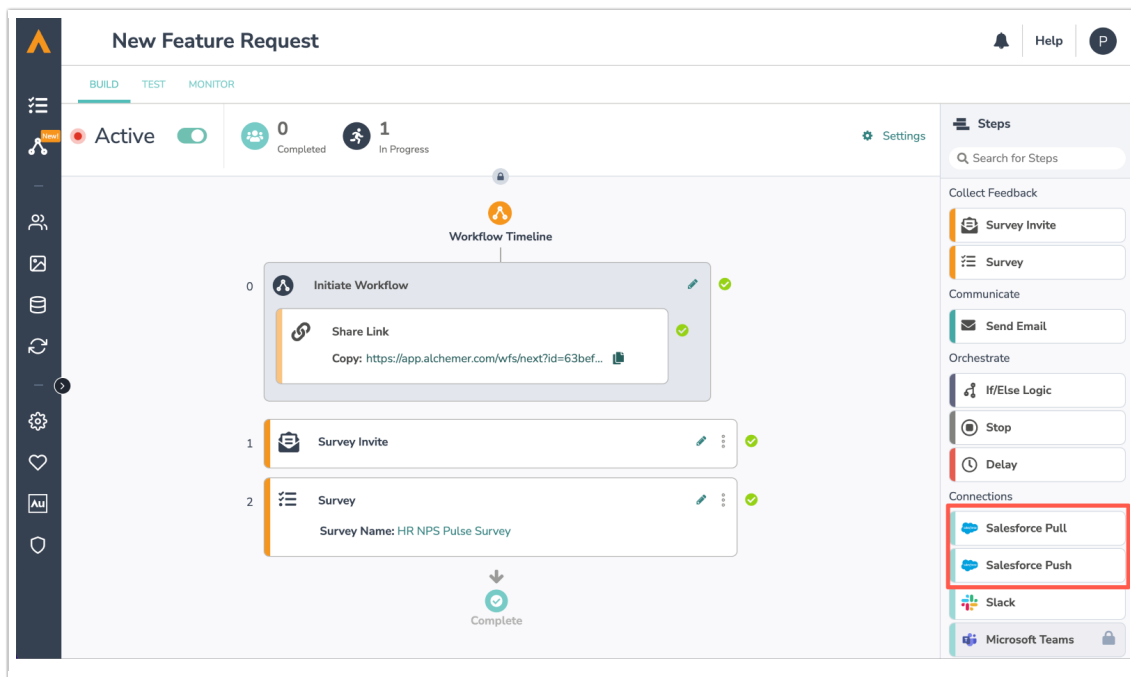
Overview

The ability to exchange data between workflows and your Salesforce account enhances your customer insights, facilitating a holistic and more personalized approach to customer and prospect relationships.

With the Alchemer Workflow Salesforce integration, you can p ush or pull data from a workflow into or out of Salesforce. This integration is built the same as a Salesforce integration action in Alchemer Survey.

How to use Salesforce Push/Pull with Alchemer Workflow

To get started, follow these detailed instructions to connect your Alchemer Account with Salesforce.

1. From the Step Library, drag a Salesforce Push or Pull step onto your workflow.

2. Click the pencil icon on your Salesforce Push or Pull step to configure the step.

3. Select your Salesforce account and fill in the required fields:

Select a Salesforce Integration

Salesforce Account

-- Select an Account --

Salesforce Object

-- Select an Object --

Integration Option

◉ Push survey data into Salesforce

Push data via [Upsert]

Query Salesforce for records that match the following

[-- Selec] [-- Selec] equals [-- Salesforce Fic]

+ Add condition

View or edit SOQL

Field Mapping

Workflow Step	Workflow Field		Salesforce	Default Value
-- Select	-- Questi	→	-- Salesforce Field --	

+ Add another mapping

Setting up a Salesforce Push Step

Select a Salesforce Integration

Salesforce Account

-- Select an Account --

Salesforce Object

-- Select an Object --

Integration Option

◉ Pull data from Salesforce

Query Salesforce for records that match the following

[-- Selec] [-- Selec] equals [-- Salesforce Fic]

+ Add condition

View or edit SOQL

Field Mapping

Workflow Field		Salesforce	Default Value
	←	-- Salesforce Field --	

+ Add another mapping

Setting up a Salesforce Pull Step

4. Click the "Save Action" button to finalize the step.

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