

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.

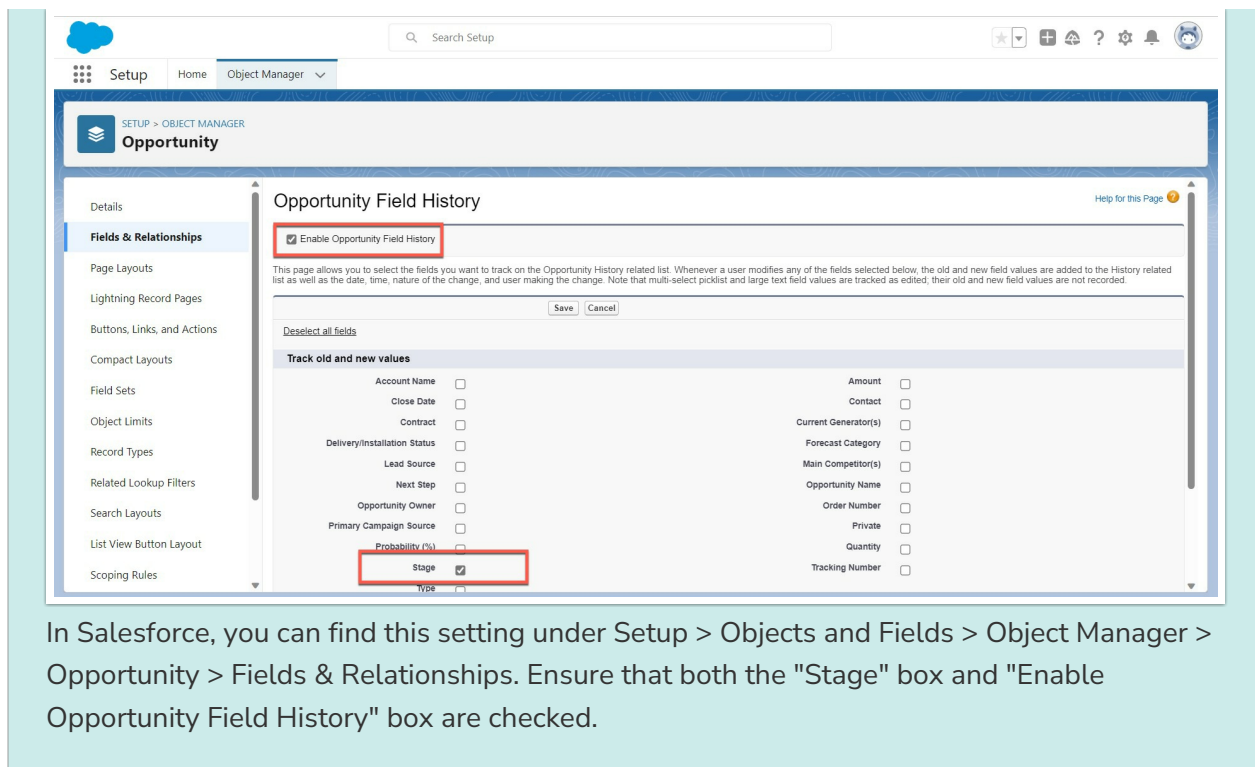
Set-up

The user who authenticates the Salesforce Integration with Alchemer must have **ModifyAllData** and **ModifyMetadata** permissions in Salesforce.

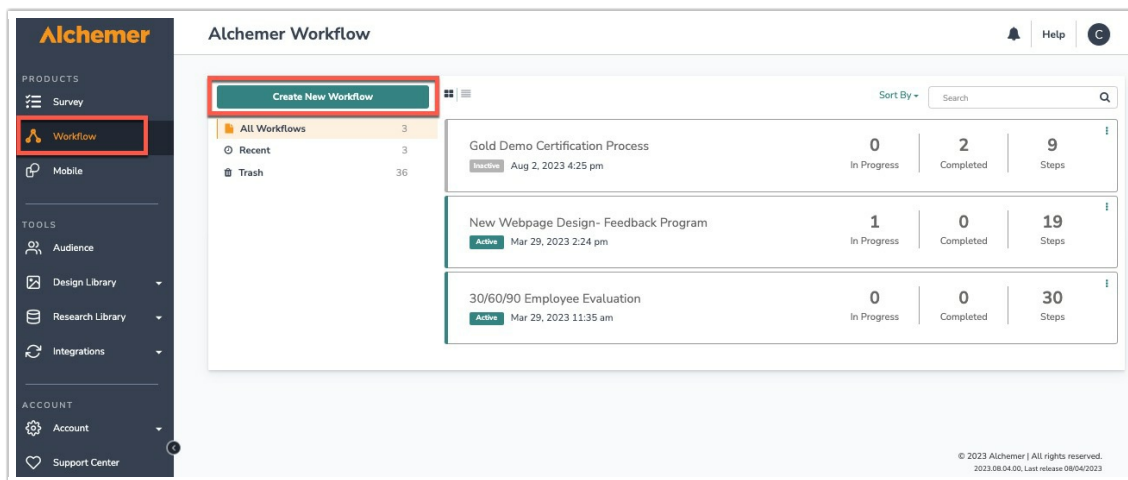
These permissions are required by Salesforce to complete the initiator setup on the backend. The Salesforce initiator is read-only and will NOT modify any Salesforce data.

Additional Requirements for Opportunity Closed Won or Lost Initiators

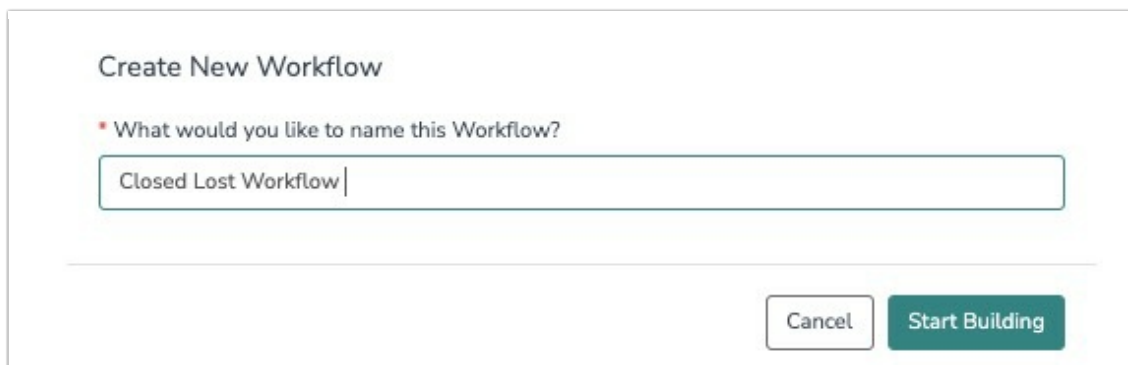
Customers using the Salesforce Opportunity Closed Won or Lost Initiators must enable field history for the Stage field for opportunities.



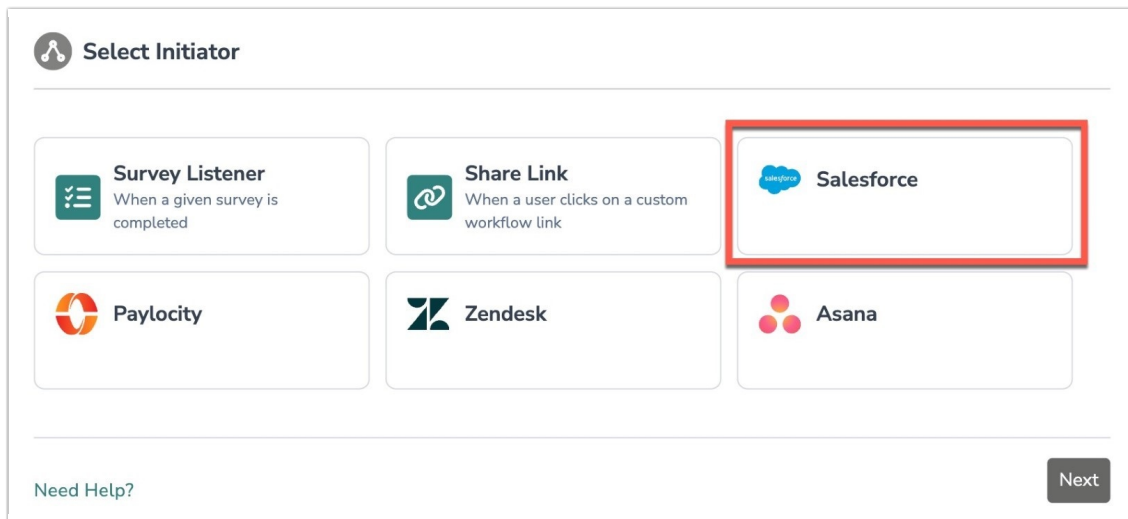
1. Create a new Workflow.



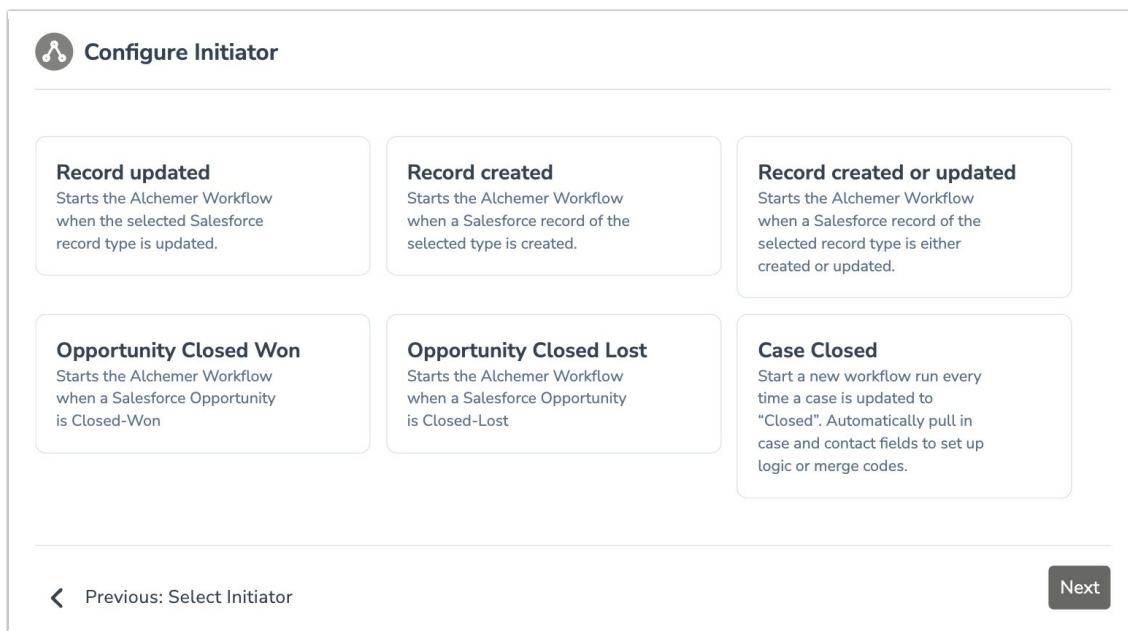
2. Name your Workflow.




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](#).

 **Configure Initiator**

Authentication


Select a Salesforce account to connect to.

Salesforce connected ^

[Add a new account](#)

Cancel Next

- 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.

 **Configure Initiator**

Select a record type*

Contact v

Select at least one field*

Field

Choose an option v

Previous Finish

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

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



Salesforce Opportunity Closed Lost

Thank you



Previous

Finish

< Previous: Configure Initiator

Save



Salesforce Opportunity Closed Lost

Thank you



Integration successfully setup!



Close this window now

Previous

Finish

< Previous: Configure Initiator

Save

FAQs

- ▷ What Salesforce credentials are needed to set up the Salesforce integration?

▷ 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!

Related Articles