

Alchemer Workflow Salesforce Initiator

The Salesforce initiator is available for purchase as an add-on. If you are interested in purchasing, please [contact us](#) for additional information.

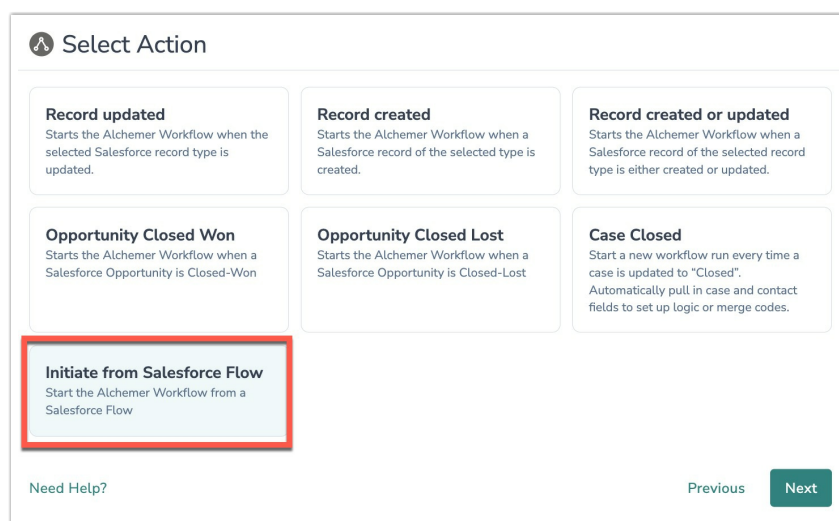
Overview

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:

1. Initiate Workflows from Salesforce Flows.



For configuration details, [refer to this document](#).

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

- The ability to add and create Flows in Salesforce
- The ability to add HTTP callout actions to your Flows in Salesforce.

OR

2. Initiate a Workflow when specific events occur in Salesforce or Salesforce objects are updated.

Select Action

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.

Initiate from Salesforce Flow
Start the Alchemer Workflow from a Salesforce Flow

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For configuration details, [refer to this document](#).

The user who authenticates this 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 [initiate via a Salesforce Flow](#).

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

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