Alchemer Workflow Gladly Initiator

The Gladly initiator is available for purchase as an add-on. If you are interested in purchasing, please contact us for additional information.

Overview

Alchemer's Gladly initiator is a powerful solution that combines customer service and feedback collection.

With this integration, events that occur Gladly can automatically trigger targeted customer feedback Workflows, enabling you to gather valuable customer feedback at key touch points. This integration simplifies the process of collecting and utilizing customer feedback, providing a comprehensive solution for improving your services and overall customer satisfaction.
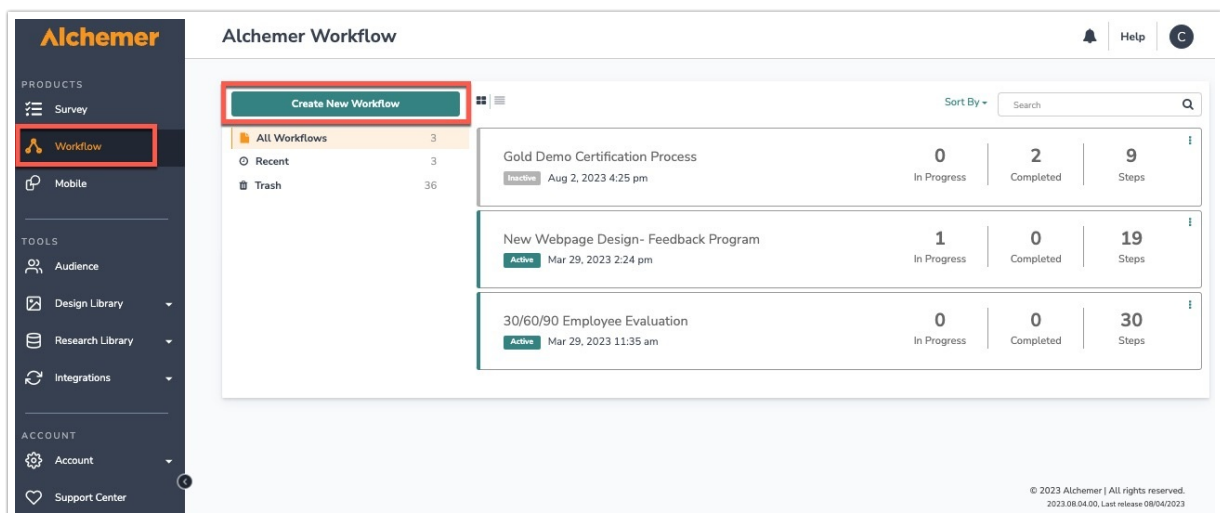
With Alchemer and Gladly, you and your team can:

- Initiate a Workflow when a Conversation Closed event occurs in Gladly.
- Looking for other Gladly events? Contact us here!

The Gladly initiator uses webhooks. Learn more about creating webhooks in Glady here.

Setup

1. Create a new Workflow.

2. Name your Workflow.

Create New Workflow

* What would you like to name this Workflow?

Customer Service Feedback Workflow

Cancel   **Start Building**

3. After creating a new Workflow, select Gladly as your Workflow initiator.

Select Initiator

| Asana | Braze |
| Custom Events | Gladly |

4. Select Conversion Closed Webhook and then click "Next".

Select Action   ✕

Conversation Closed Webhook
Start a new Workflow run when a Conversation Closed event occurs in Gladly.

Conversation Closed webhook with do-not-survey support
Start a new Workflow run when a Conversation Closed event occurs in Gladly. Includes support for do-not-survey support.

Need Help?   Previous   Cancel   Next

For additional information on configuring and using the "do-not-survey" supported initiator action, refer to this documentation.

5. Hit "Next" on the initiator overview screen.

Configure Initiator

Gladly | Conversation Closed Webhook

Start a new Workflow run when a Conversation Closed event occurs in Gladly.

ⓘ Proceed to the next step to configure your initiator.

Previous   **Next**

6. Enter your Gladly API Credentials or select an already authenticated account.

Configure Initiator   ✕

Gladly | Conversation Closed Webhook

Enter your Gladly API credentials

⬜ New authentication

Previous   **Next**

7. Name your authentication, then provide your Gladly URL, email address, and Token.

> WATCH OUT: Your Gladly URL must include "https://" at the beginning of the URL and not include the trailing slash at the of the URL.

Create a new authentication ✕

URL

https://companyname.gladly.com

Email

No value

Token

Previous   Create

7. Within your Gladly account, create a Conversation Closed Webhook that, once fired, will initiate your Workflow.

> For more details on this process, you can review Gladly's documentation here. Make sure to select CONVERSATION CLOSED from the Events search picklist when configuring the webhook in Gladly.

7. When composing the new webhook, set the Webhook URL to the endpoint supplied by Alchemer.

8. Click the "Save" button to complete configuration for this initiator.

Merge Codes

When the webhook fires, Gladly 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 Gladly - Conversation Closed Webhook**

Use Case

TechSolutions Inc. relies on Gladly as its primary customer service platform. As a company they want the ability to collect timely and relevant customer feedback after customer interactions end, but currently they struggle with inconsistent and manual feedback collection processes.

To address these challenges, TechSolutions Inc. utilizes the Alchemer Workflow Gladly initiator. This initiates feedback Workflows automatically when a "Conversation Closed" event occurs in Gladly.

The Alchemer Workflow Gladly initiator enables immediate feedback collection, allowing TechSolutions Inc. to promptly address customer concerns. Additionally, this integration streamlines the feedback process, ensuring consistency and efficiency in collecting feedback after every customer interaction.

FAQs

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

▷   Can multiple Workflows initiate off the same Gladly initiator?

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

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