Alchemer Workflow Kustomer Initiator

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

Overview

Kustomer is a customer service CRM platform built for managing high support volume. The Alchemer Workflow Kustomer initiator allows you to automatically trigger targeted customer feedback Workflows in Alchemer, after specific events occur in Kustomer. This helps your organization simplify the process of collecting and utilizing customer feedback, while providing a comprehensive solution for improving your services and overall customer satisfaction.

With Alchemer and Kustomer, you and your team can:

- Initiate a Workflow in Alchemer from a Workflow in Kustomer.

The Kustomer initiator uses outbound webhooks. Learn more about creating webhooks in Kustomer here.

Setup

1. Create a new Workflow.

2. Name your Workflow.
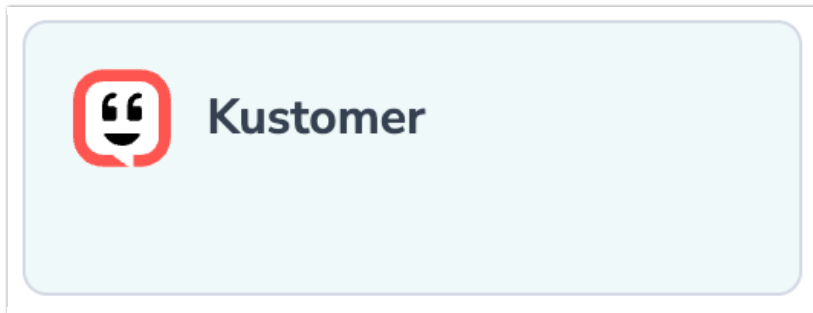
Create New Workflow

* What would you like to name this Workflow?

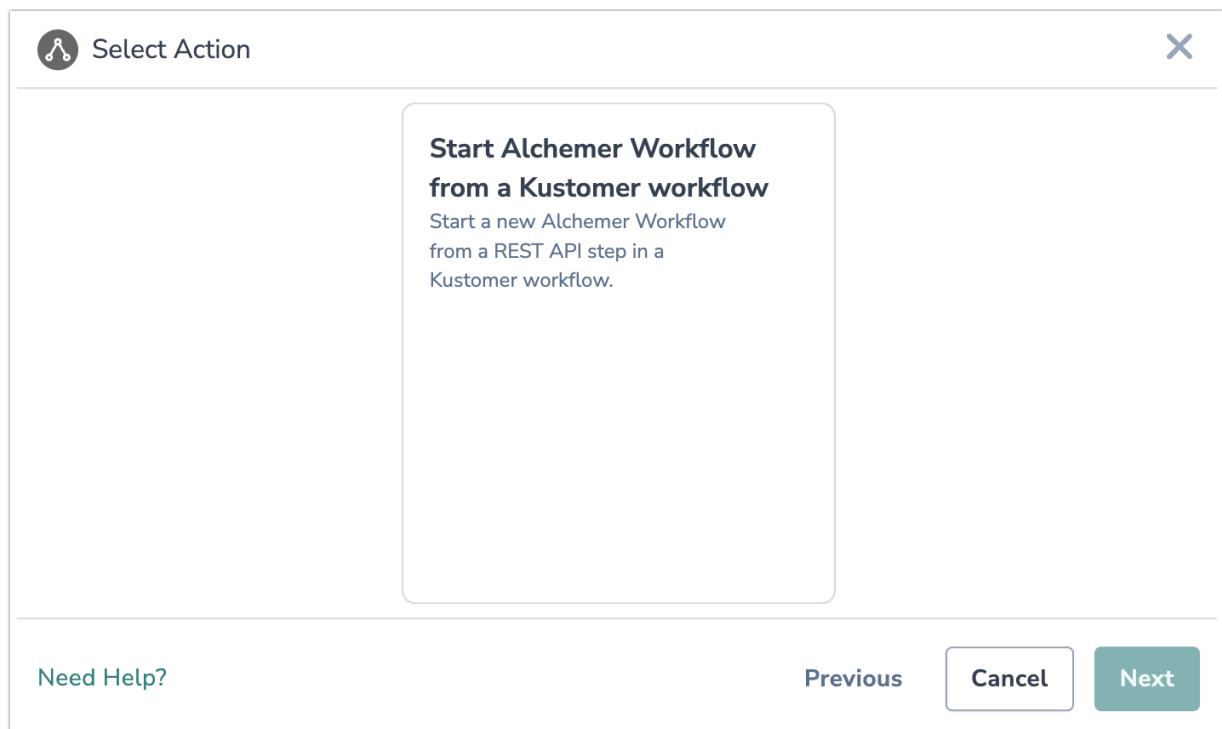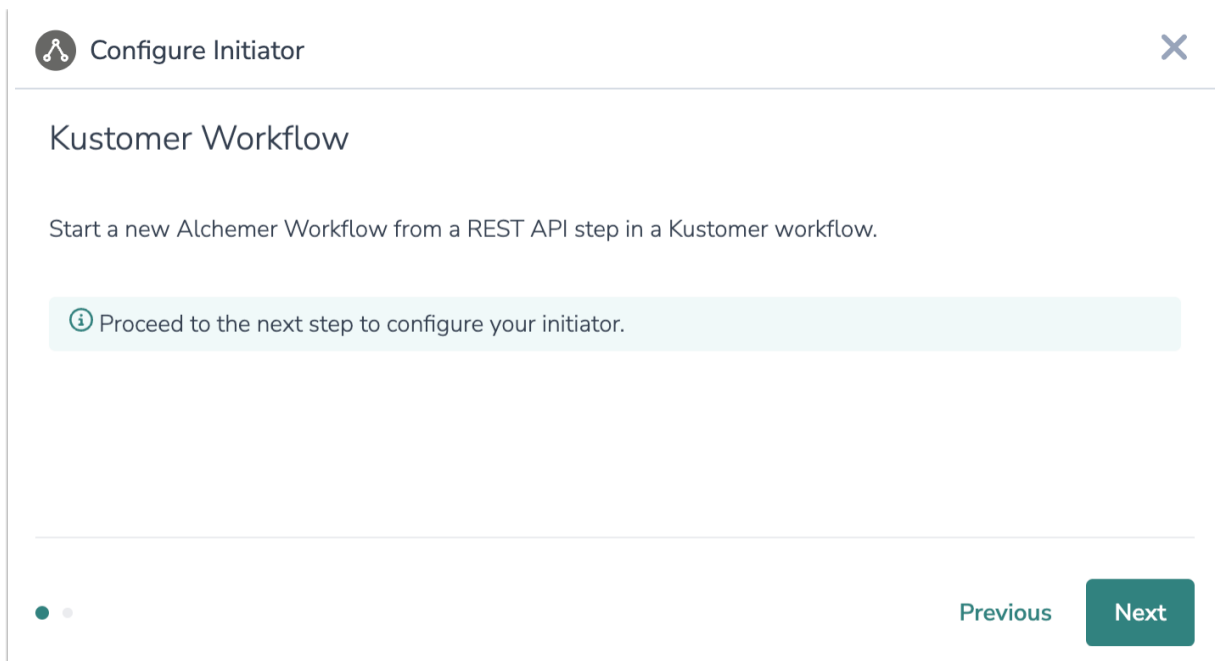Customer Service Feedback Workflow

Cancel   **Start Building**

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

4. Select the Start Alchemer Workflow from a Kustomer Workflow and then click "Next".

Select Action   ✕

Start Alchemer Workflow from a Kustomer workflow

Start a new Alchemer Workflow from a REST API step in a Kustomer workflow.

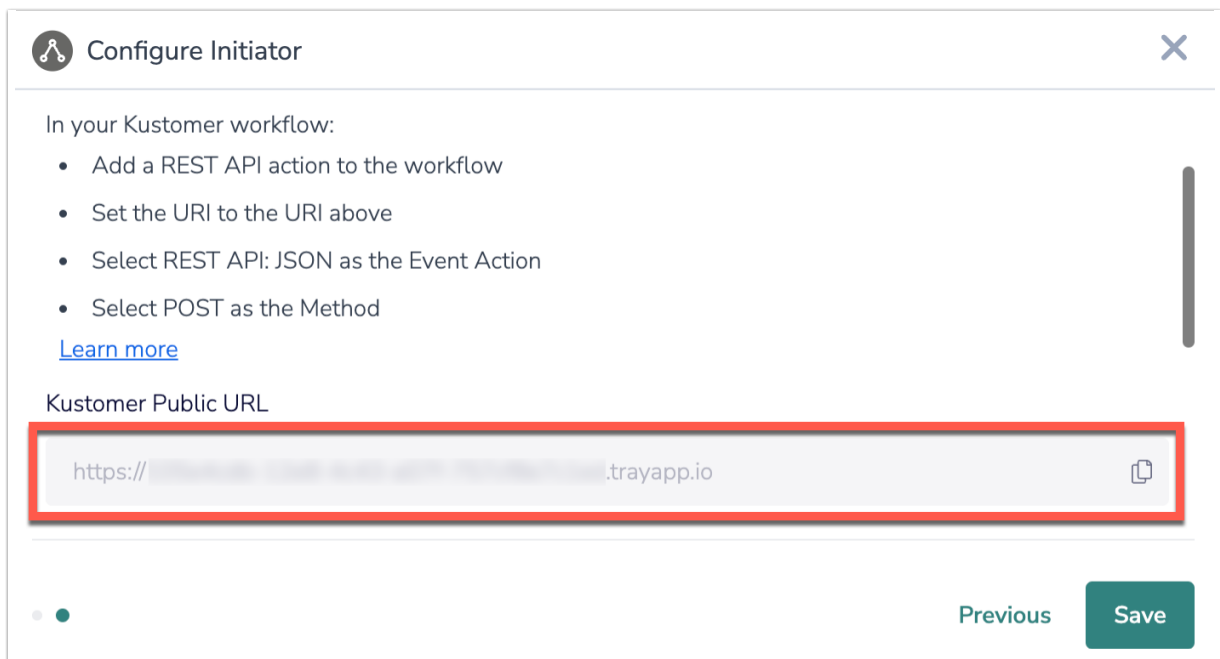Need Help?   Previous   Cancel   **Next**

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

6. In Kustomer, select a Workflow and add a REST API action to the workflow

Refer to this documentation for more details on creating webhooks in Kustomer.

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

8. Select REST API: JSON as the Event Action.

9. Select POST as the Method.

10. Add Kustomer data fields. When done, click "Add to Kustomer data fields."

> **The fields must match exactly in both Alchemer and Kustomer**. For example, a field labeled "last_name" in Kustomer must be added as "last_name" in Alchemer.

⚙ Configure Initiator ✕

- Add fields names below to match the data fields in Kustomer (field names must match)

[Learn more.](#)

Kustomer data fields *(optional)*

0

| last_name |

Add to Kustomer data fields

● ●   Previous   **Save**

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

Merge Codes

When the webhook fires, Kustomer will pass any custom fields you defined 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.

FAQs

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

▷ **Can multiple Workflows initiate off the same Kustomer initiator?**

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

Related Articles