Alchemer Workflow Kustomer Initiator

The Kustomer initiator is included with Alchemer Workflow. If you are interested in purchasing Alchemer Workflow, 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.

Set Up

1. Create a new Workflow.

2. Name your Workflow.
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".

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."
They 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.

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

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!

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