

Alchemer Workflow Hubspot Initiator

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

Overview

HubSpot is a leading contact relationship management (CRM), marketing, sales, and customer service software company. This initiator pairs Alchemer's robust Workflow and survey functionality with HubSpot's diverse suite of capabilities.

With this integration, you can initiate personalized customer feedback Workflows in Alchemer after specific events occur in your HubSpot Workflows, ensuring the collection of timely and targeted feedback from your customers.

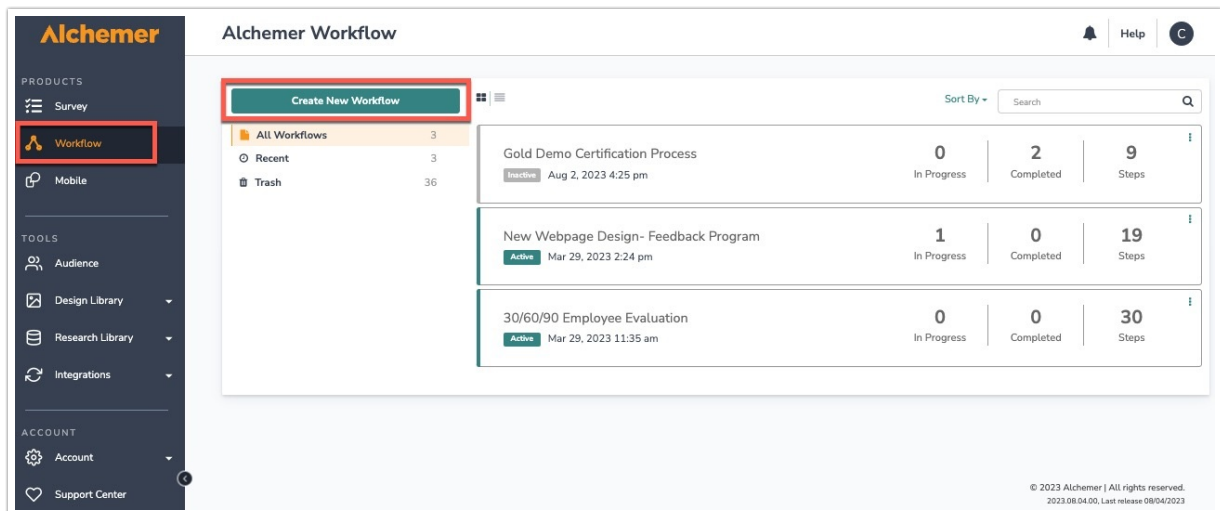
With Hubspot and Alchemer, you and your team can:

- Initiate Workflows after events occur in HubSpot.

The HubSpot initiator uses webhooks. Learn more about creating webhooks in HubSpot [here](#).

Setup

1. Create a new Workflow



The screenshot shows the Alchemer Workflow management interface. On the left is a dark sidebar with navigation options: PRODUCTS (Survey, Workflow, Mobile), TOOLS (Audience, Design Library, Research Library, Integrations), and ACCOUNT (Account, Support Center). The 'Workflow' option is highlighted with a red box. The main content area is titled 'Alchemer Workflow' and features a 'Create New Workflow' button at the top left, also highlighted with a red box. Below this is a list of workflows:

Workflow Name	Status	Created	In Progress	Completed	Steps
All Workflows		3			
Recent		3			
Trash		36			
Gold Demo Certification Process	Inactive	Aug 2, 2023 4:25 pm	0	2	9
New Webpage Design- Feedback Program	Active	Mar 29, 2023 2:24 pm	1	0	19
30/60/90 Employee Evaluation	Active	Mar 29, 2023 11:35 am	0	0	30

At the bottom right of the interface, there is a copyright notice: © 2023 Alchemer | All rights reserved. 2023.08.04.00, Last release 08/04/2023.

2. Name your Workflow.







Create New Workflow

* What would you like to name this Workflow?

[Cancel](#) [Start Building](#)

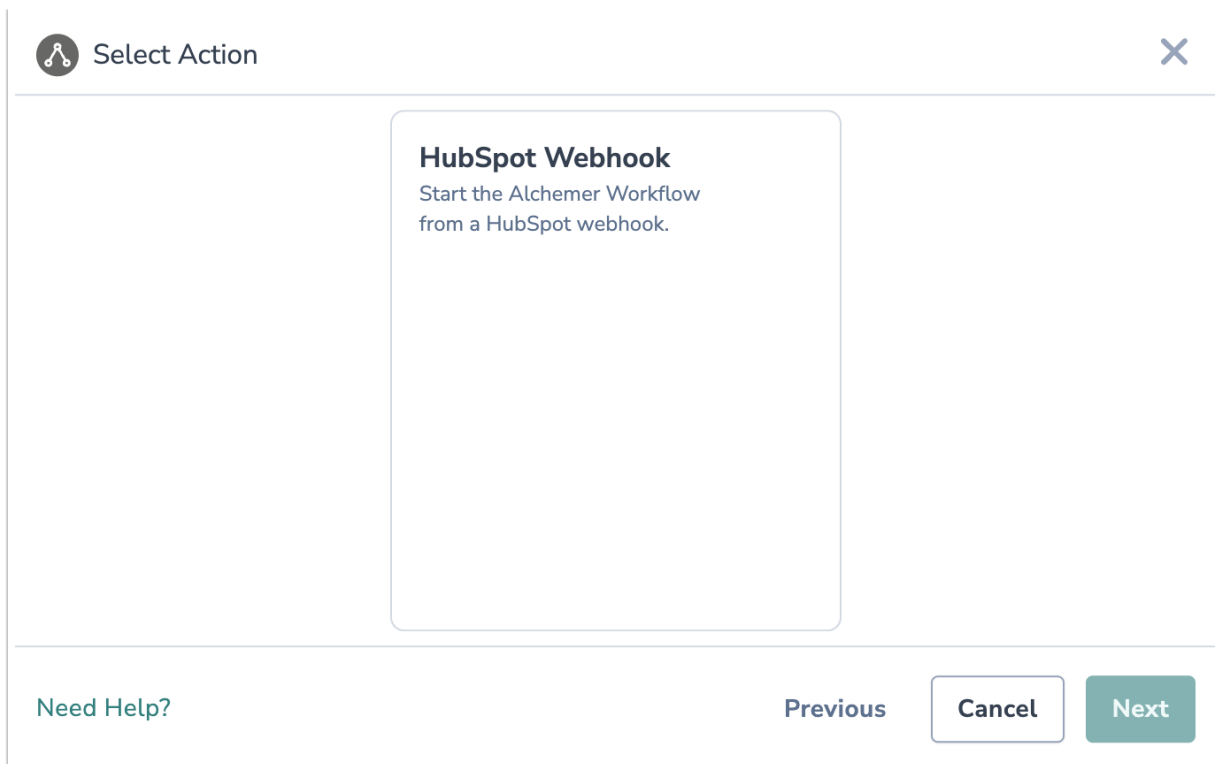
3. After creating a new Workflow, select HubSpot as your Workflow initiator.

Select Initiator

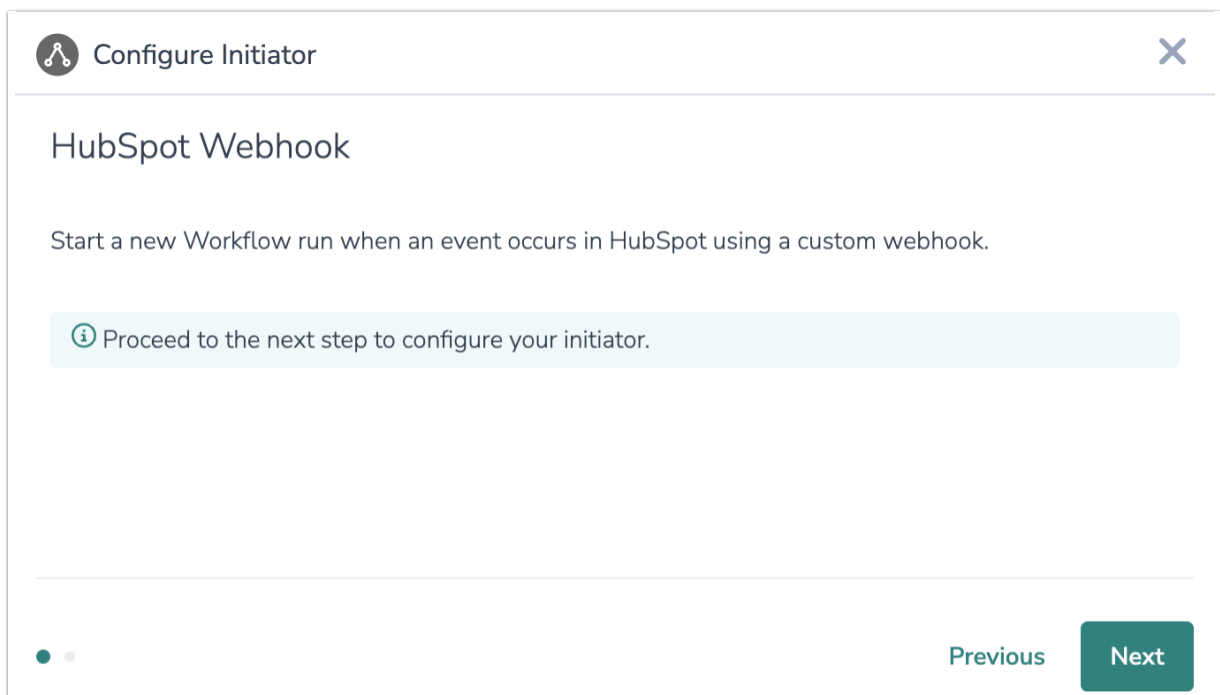
 Asana	 Braze
 Custom Events	 Gladly
 HubSpot	 Kustomer

[Need Help?](#) [Next](#)

4. Select HubSpot Webhook and then click "Next".




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



6. Within your HubSpot account, select a Workflow or create a new one. Then add a webhook that, once fired, will initiate your Workflow in Alchemer.

For more details on this process, you can review [HubSpot's documentation here](#).

7. When composing the new webhook, enter the Webhook URL supplied by Alchemer.

 Configure Initiator
✕

HubSpot Webhook

HubSpot Webhook URL

Set the webhook URL in HubSpot to this endpoint. [Learn more.](#)

HubSpot Webhook URL

HubSpot Custom Request Body Keys

Set the Request Body in HubSpot to 'Customize request body'.

Previous
Save










8. Then add any Request Body Keys to the webhook in HubSpot. Whenever the webhook fires, this information will be sent to Alchemer and you will be able to use these values as merge codes in Workflow steps.

For more information on this step, refer to [HubSpot's documentation here](#).

Request body
Choose the properties you want to include in the webhook request body.

Include all contact properties

Customize request body

email	Email 		
firstname	First Name 		
lastname	Last Name 		

9. Configure the Request Body Keys in Alchemer Workflow, so that Alchemer can receive the keys in the request body. When done, click the "Add to HubSpot Keys" button.

They keys must match exactly in both Alchemer and Hubspot. For example, a key labeled "email" in HubSpot must be added as "email" in Alchemer.

Learn more.'. Below this is a section 'HubSpot Keys (optional)' with three input fields: '0' containing 'email', '1' containing 'firstname', and '2' containing 'lastname'. A green button labeled 'Add to HubSpot Keys' is positioned below the input fields. At the bottom right of the dialog, there are two buttons: 'Previous' and 'Save'."/>

Configure Initiator

HubSpot Custom Request Body Keys

Set the Request Body in HubSpot to 'Customize request body'.
Add a key below for each key/value pair created in HubSpot. [Learn more.](#)

HubSpot Keys (optional)

0
email

1
firstname

2
lastname

Add to HubSpot Keys

Previous Save

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

Use Case

ABC Software use HubSpot to run complex, cross-channel Workflows. However, the team at ABC Software need the ability to include longer surveys as part of their Workflows. In this specific example, they want to send long form customer experience surveys to their largest enterprise customers after a set of specific events occur in HubSpot.

To accomplish this, ABC Software use the Alchemer Workflow HubSpot initiator to trigger a customer feedback Workflow in Alchemer, after a series of events occur in a HubSpot Workflow. They add a webhook to their workflow in HubSpot that triggers the Workflow in Alchemer when the specified events occur. This integration between HubSpot and Alchemer allows ABC Software to collect in-depth feedback from their largest enterprise customers through extended surveys, enhancing their understanding of customer experiences and ultimately improving their services.

Merge Codes

When the webhook fires, Hubspot will pass any custom 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](#).

FAQs

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

▷ Can multiple Workflows initiate off the same HubSpot initiator?

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

Related Articles