

Using Merge Codes with Alchemer Workflow Integrations

Alchemer Workflow integrates with [numerous external systems](#). Once configured, many of these systems will pass custom or pre-set fields over to Alchemer Workflow. You can use these fields in [merge codes](#), logic, and other Workflow features.

This article walks you through where to find these merge codes and how to use them in Alchemer Workflow. There are other ways to use the merge codes that external Alchemer Workflow integrations provide, these are just a few of the most common use cases.

The following examples are for the Alchemer Workflow Asana integration. Please consult the documentation for each integration to view available merge codes or read instructions on how to pass custom fields.


Survey Invite and Send Email Steps

In the editor for Survey Invite and Send Email steps, you can add merge codes to the:

- From Name
 - To Address
 - Email Body
-


Edit Action

PRIMARY SETUP ♥ Need Help?


From Name
Quick fills: [Me](#)
[Select a Merge Code](#) 

From Address ▾

Reply To

To
Quick fills: [Me](#)
[Select a Merge Code](#) 

Subject

Your next step is ready. Please click the link below to continue!
[Continue on your journey](#) 

Automatically generate plain-text version

Plain-Text Message Body

Upon clicking the "Select a Merge Code," you'll find a list of Integration Fields available for selection under the Workflow tab.

Edit Action
♥ Need Help?

PRIMARY SETUP

Quick fills: [Me](#)
[Select a Merge Code](#)

From Address: @surveygizmo.com (Alchemer) ▼

Reply To:

To:

Quick fills: [Me](#)

Workflow

About Your Account

Integration Fields (73)

Asana Custom Field Customer Email	Insert
Asana Event Trigger User email	Insert
Asana Event Trigger User gid	Insert
Asana Event Trigger User name	Insert
Asana Event Trigger User photo	Insert
Asana Project archived	Insert

Subject:

Cancel
Save Action

After you insert a merge code it looks something like this:

From Name:

Quick fills: [Me](#)
[Select a Merge Code](#)

From Address: @surveygizmo.com (Alchemer) ▼

Reply To:

To:

Quick fills: [Me](#)
[Select a Merge Code](#)

Subject:

If/Else Logic

You can also use merge codes in If/Else Logic conditions. This is a great way to take personalized or targeted actions when certain conditions are met in your external system.

After adding an If/Else Logic block to your Workflow, click "Add Condition". Under the "Select

Step" drop down, choose "External Listener".

Edit If/Else Logic

Select step and then set the logic

Step Name

▼ ✎ ✖

Add Another Step

Click the pencil icon and create your logic conditions.

Logic Builder

Logic Conditions

Remove All Logic

▼ ▼

+ Add Condition + Add Group

Connection Steps

You can also add merge codes to Connection steps, like Salesforce Push, Microsoft Teams, or Slack. This a great way to pass information from an external system to your CRM (Salesforce) or pass information to stakeholders and teams (Slack and Microsoft Teams).

Here is what a Slack step looks like when merge codes are added from Asana:

Edit Action

PRIMARY SETUP

♥ Need Help?

Slack
Integration

Alchemer Slack

Channel or User

[stepquestion('value'), step='start', id='Asana | Task | workspace | name']

[Select a Merge Code](#)

Message

A new project has been completed:
[stepquestion('value'), step='start', id='Asana | Task | completed_at']
[stepquestion('value'), step='start', id='Asana | Project | team | name']

[Select a Merge Code](#)

Slack Bot Name

Alchemer

[Select a Merge Code](#)

Slack Bot Icon

- Use default icon
- Use a Slack emoji
- Use a custom image

Cancel

Save Action

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