

# Alchemer Workflow Gladly Push/Pull Integration

The Alchemer Workflow Gladly Integration is available for purchase as an add-on. If you are interested in purchasing, [please contact us for more information](#).

## Overview

With the Gladly Integration for Alchemer Workflow there are two integration actions:

- Get Customer: Pull in information from a Gladly customer record into your Workflow.
- Update Customer: Update a Gladly customer record with information from your Workflow.

The integration enables you to personalize workflow steps in Alchemer using information from Gladly and facilitates new customer insights by bringing customers feedback into your customer profiles within Gladly.

## Integration Setup

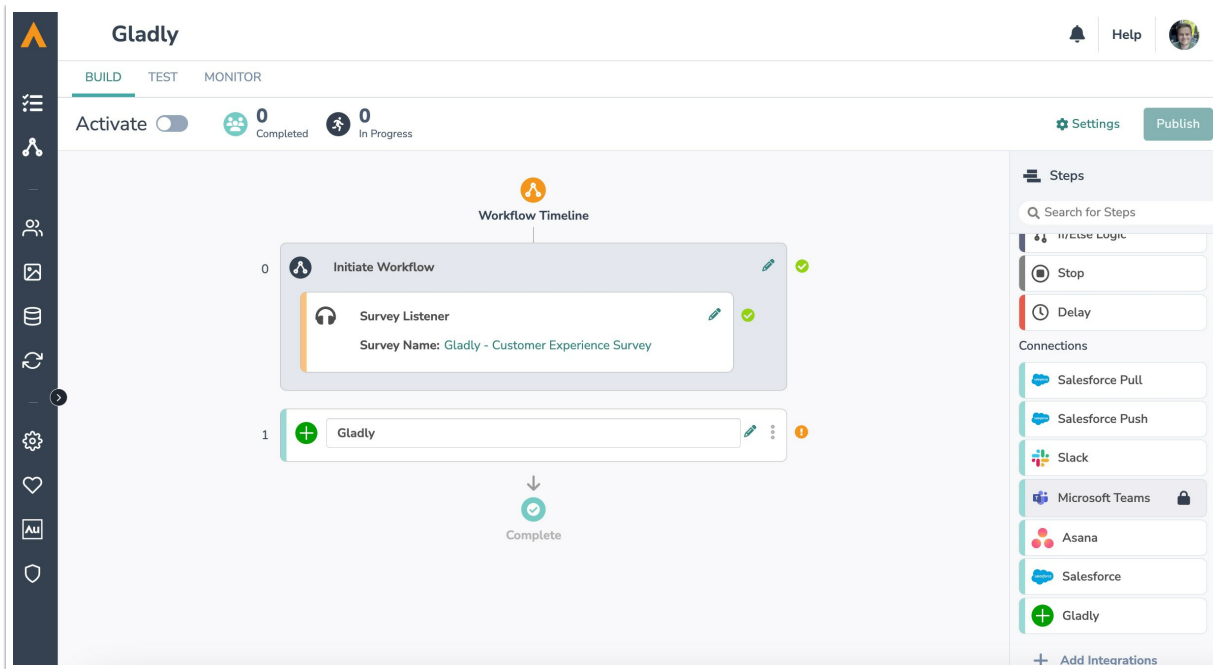
1. Create a Workflow in Alchemer and select your initiator.

For more information on building Workflows in Alchemer refer to the following documentation:

- [Getting Started with Alchemer Workflow](#)
- [Building a Workflow](#)

2. When you are ready to add the Gladly step to your Workflow, drag the Gladly step from the Step Library under Connections.

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3. Click the pencil icon to configure your Gladly integration step.



4. Select the integration action you'd like to use.

- Get Customer: Pull in information from a Gladly customer record into your Workflow. Click [this link](#) for specific guidance on this integration action.
- Update Customer: Update a Gladly customer record with information from your Workflow. Click [this link](#) for specific guidance on this integration action.

## Gladly | Get Customer

To configure a Gladly Get Customer integration step you will need:

- Your Gladly login
- Fields in this Workflow that will contain the data used to lookup the Gladly customer record.

1. After selecting Get Customer, click "Next".

2. Select the Alchemer Team that you would like to assign as the owner of the integration.

**Configure Integration**

PRIMARY SETUP

### Select Team

Select the Alchemer Team that you would like to assign as the owner of this integration

Select a team ▼

- Team 1 (252324)
- Team 2 (252407)

Back Next

3. Click "Next" on the integration overview screen.

**Configure Integration**

PRIMARY SETUP

### Gladly | Get Customer

Get a Gladly customer record.

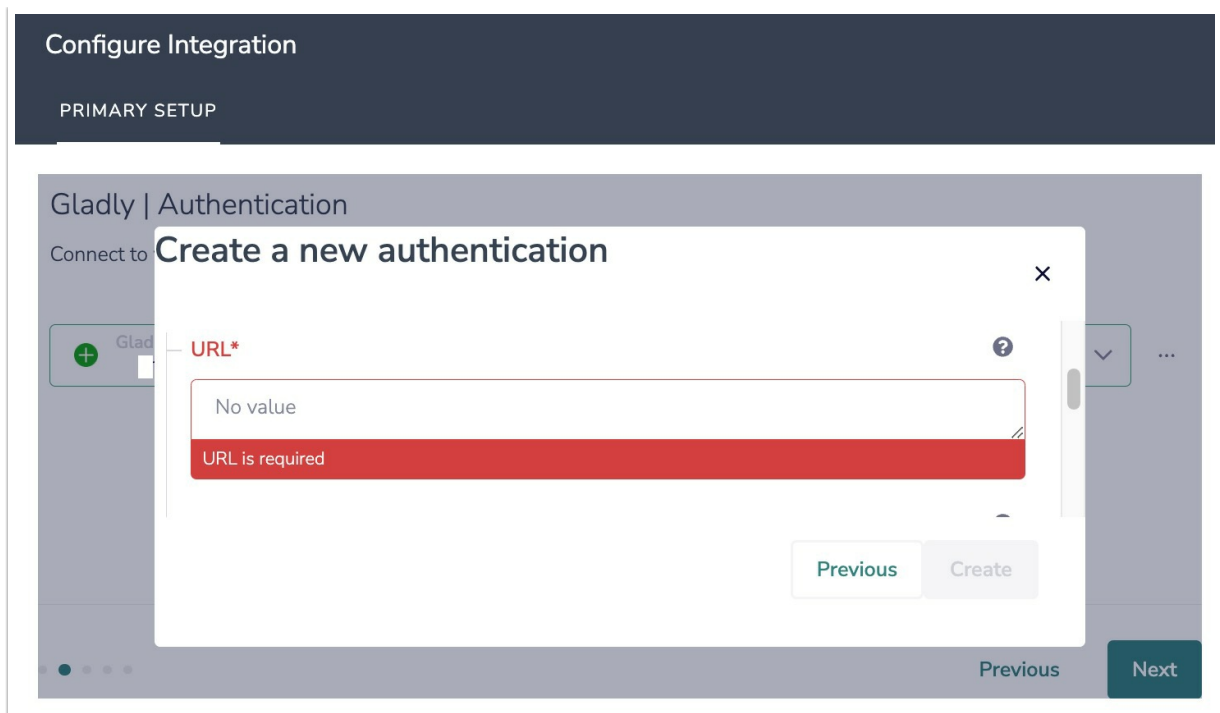
**You will need:**

- Your Gladly login
- Fields in this Workflow that will contain the data used to lookup the Gladly customer record

Need help? [Learn more](#)

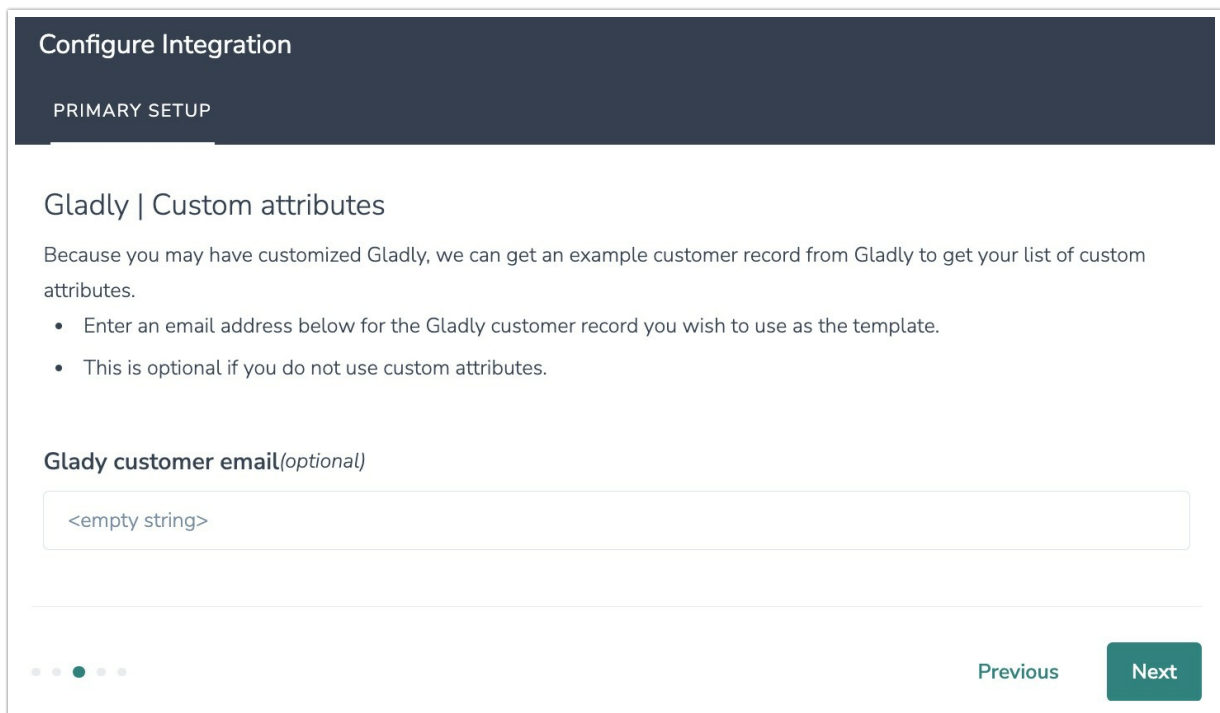
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4. Click "New Authentication" and then connect to your Gladly account by providing your Gladly URL, email, and your Gladly API token.



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

5. *Optional:* Because you may have customized Gladly, we need an example customer record from Gladly to get your list of custom attributes. Enter an email address below for the Gladly customer record you wish to use as the template.



6. Select the field in the Workflow that you want to use to find the specific customer record in Gladly. Customer email will often make the most sense, but you can use any of the other fields listed in the drop-down list.

## Configure Integration

PRIMARY SETUP

### Gladly | Find the Gladly Record

We need to find the customer record to update when the Workflow runs.

Click 'Add a new mapping' below to get started.

Match this Alchemer field value

to a value in this Gladly field

Step 2 | Survey Questions - Gladly - Customer Experience Survey | 1. Email (id: 4)

Gladly | Customer | email

Step 2 | Survey Questions - Gladly - Customer Experience Survey | 1. Email (id: 4)

Step 2 | Survey Questions - Gladly - Customer Experience Survey | 2. Custom attribute (id: 5)

Step 2 | Survey Questions - Gladly - Customer Experience Survey | 3. Input 3 (id: 13)

Step 2 | Survey Questions - Gladly - Customer Experience Survey | 4. Custom attribute (id: 20)



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You can only use one field to find the customer record.

7. Click "Save" to complete integration setup.

## Configure Integration

PRIMARY SETUP

### Gladly | Setup complete

A log of each run result can be found in the Monitor tab



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Save

### Now what / Where is my data?

All of the information from this integration is now available in this workflow and all surveys in this workflow. You can use them to:

- Add Merge Codes to Email or Survey Invite steps.
- Use with Logic in the workflow.
- Use to personalize the survey in the workflow.

## Gladly | Update Customer

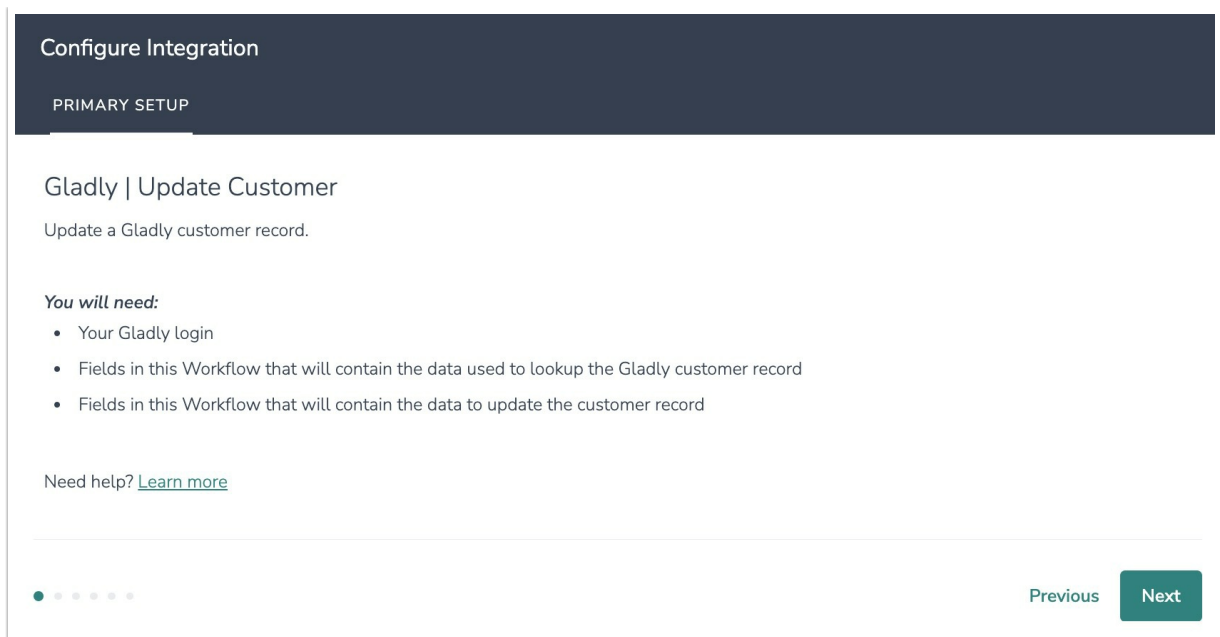
To configure a Gladly Update Customer integration step you will need:

- Your Gladly login
- Fields in this Workflow that will contain the data used to lookup the Gladly customer record
- Fields in this Workflow that will contain the data used to update the customer record

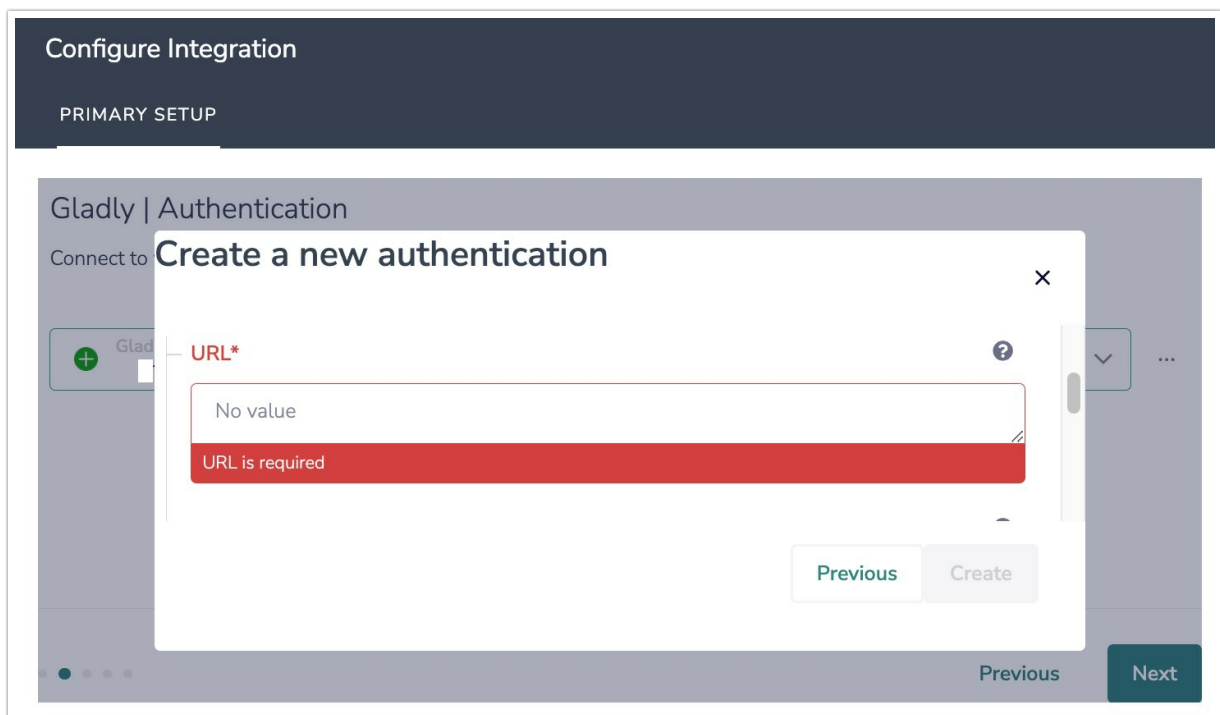
1. After selecting Update Customer, click "Next".
2. Select the Alchemer Team that you would like to assign as the owner of the integration.

The screenshot shows a dark blue header with the text "Configure Integration" and "PRIMARY SETUP" below it. The main content area is white and contains the heading "Select Team" followed by the instruction "Select the Alchemer Team that you would like to assign as the owner of this integration". Below this is a dropdown menu with the placeholder text "Select a team" and a downward arrow. The dropdown is open, showing two options: "Team 1 (252324)" and "Team 2 (252407)". At the bottom right of the screen, there are two buttons: "Back" and "Next".

3. Hit "Next" on the integration overview screen.



4. Click "New Authentication" and then connect to your Gladly account by providing your Gladly URL, email, and your Gladly API 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.

5. *Optional:* Because you may have customized Gladly, we can get an example customer record from Gladly to get your list of custom attributes. Enter an email address below for the Gladly customer record you wish to use as the template.

## Configure Integration

### PRIMARY SETUP

### Gladly | Custom attributes

Because you may have customized Gladly, we can get an example customer record from Gladly to get your list of custom attributes.

- Enter an email address below for the Gladly customer record you wish to use as the template.
- This is optional if you do not use custom attributes.

#### Gladly customer email *(optional)*

<empty string>



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6. Select the field in the Workflow that you want to use to find the specific customer record in Gladly. Customer email will often make the most sense, but you can use any of the other fields listed in the drop-down list.

## Configure Integration

### PRIMARY SETUP

### Gladly | Find the Gladly Record

We need to find the customer record to update when the Workflow runs.

Click 'Add a new mapping' below to get started.

Match this Alchemer field value

to a value in this Gladly field

Step 2 | Survey Questions - Gladly - Customer Experience Su ^

Gladly | Customer | email

Step 2 | Survey Questions - Gladly - Customer Experience  
Survey | 1. Email (id: 4)

Step 2 | Survey Questions - Gladly - Customer Experience  
Survey | 2. Custom attribute (id: 5)

Step 2 | Survey Questions - Gladly - Customer Experience  
Survey | 3. Input 3 (id: 13)

Step 2 | Survey Questions - Gladly - Customer Experience



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7. Select the data you want to use to update the Gladly customer record.



## Configure Integration

PRIMARY SETUP

### Gladly | Select data to update

Choose the data you want to use to update the Gladly customer

Use data from this Alchemer field

To update this Gladly field

Step 2 | Survey Questions - Gladly - Customer Experience Survey | 1. Email (id: 4)

Step 2 | Survey Questions - Gladly - Customer Experience Survey | 2. Custom attribute (id: 5)

Step 2 | Survey Questions - Gladly - Customer Experience Survey | 3. Input 3 (id: 13)

Step 2 | Survey Questions - Gladly - Customer Experience Survey | 4. Input 4 (id: 20)

Gladly | Customer | name

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You can only use one field to find the customer record.

8. Click "Save" to complete the integration setup.

## Configure Integration

PRIMARY SETUP

### Gladly | Setup complete

A log of each run result can be found in the Monitor tab

Previous Save

### Now what / Where is my data?

All of the information from this integration is now available in this workflow and all surveys in this workflow. You can use them to:

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- Use with Logic in the workflow.
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## FAQs

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

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

Related Articles