

Initiate a Workflow from a Salesforce Flow

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

Overview

The process for initiating a Workflow from a Salesforce Flow differs from the other [initiators for Salesforce](#), such as "Record Updated" or "Opportunity Closed Lost."

The key differences are:

- Initiating a Workflow via a Salesforce Flow does not require the extensive Salesforce permissions that the other pre-built initiators require.
- Initiating a Workflow via a Salesforce Flow gives the Workflow user more granular control over the trigger conditions because the conditions are built into the Salesforce Flow itself.

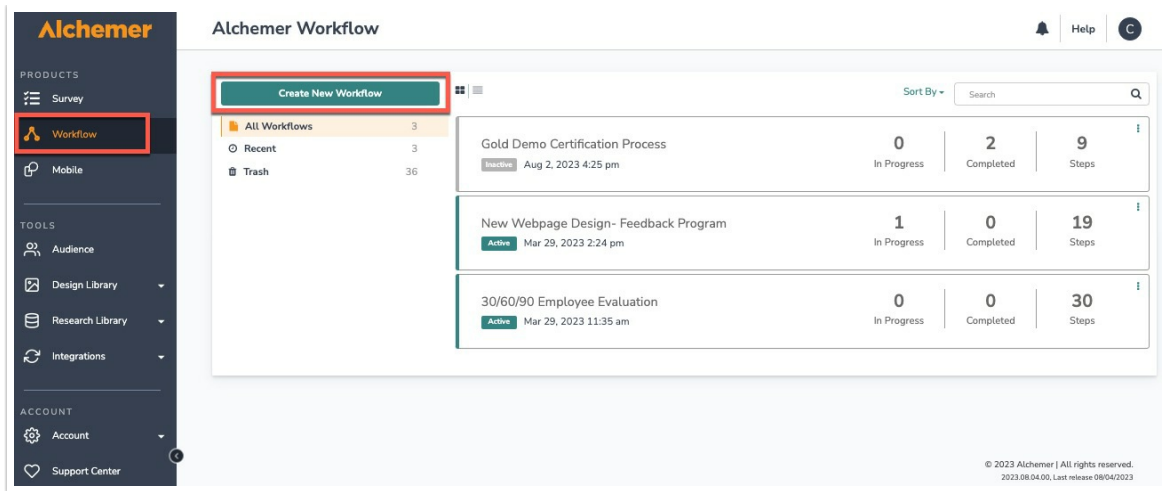
Because of these key differences, most Alchemer Workflow users will prefer to initiate Workflows via a Salesforce Flow rather than using one of the other initiators. If you still want to use a pre-built initiator action for Salesforce and have the required Salesforce permissions, refer to [this document](#) for more details.

Setup

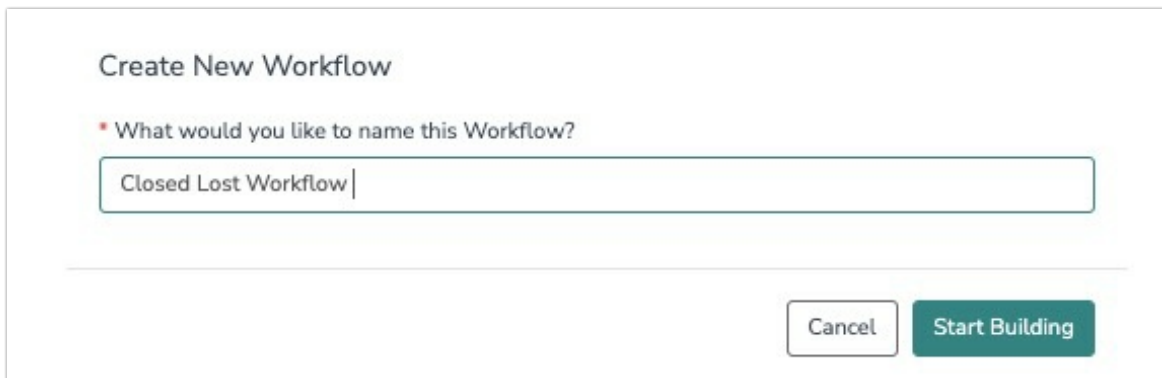
The user who authenticates this Salesforce Integration with Alchemer must have the following Salesforce permissions:

- The ability to add and create Flows in Salesforce
- The ability to add HTTP callout actions to your Flows in Salesforce.

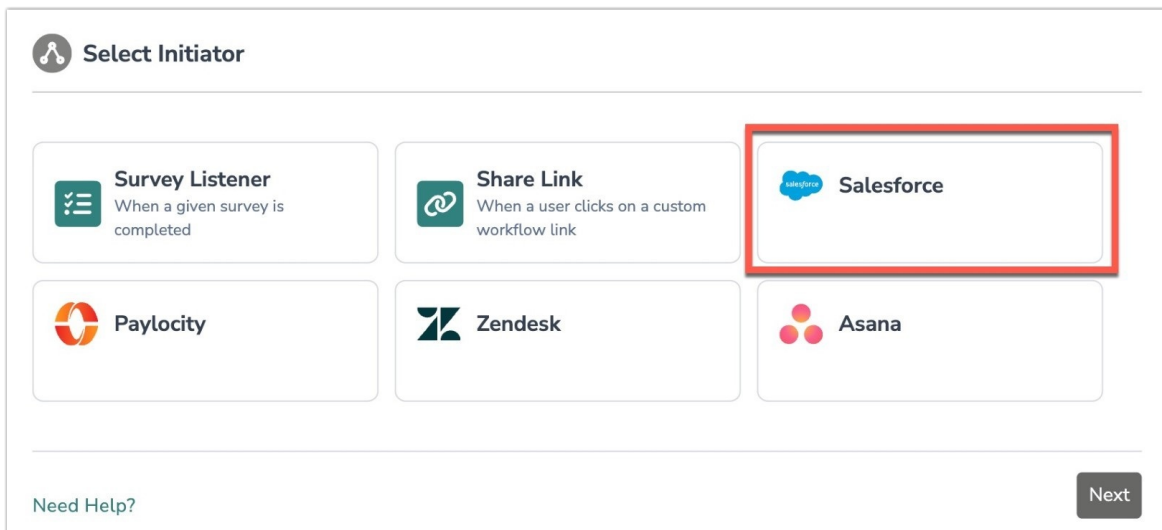
1. Create a new Workflow.



2. Name your Workflow.



3. Select the Salesforce button when choosing a Workflow initiator.



4. Choose "Initiate from Salesforce Flow".

Select Action

Record updated
Starts the Alchemer Workflow when the selected Salesforce record type is updated.

Record created
Starts the Alchemer Workflow when a Salesforce record of the selected type is created.

Record created or updated
Starts the Alchemer Workflow when a Salesforce record of the selected record type is either created or updated.

Opportunity Closed Won
Starts the Alchemer Workflow when a Salesforce Opportunity is Closed-Won

Opportunity Closed Lost
Starts the Alchemer Workflow when a Salesforce Opportunity is Closed-Lost

Case Closed
Start a new workflow run every time a case is updated to "Closed".
Automatically pull in case and contact fields to set up logic or merge codes.

Initiate from Salesforce Flow
Start the Alchemer Workflow from a Salesforce Flow

Need Help? Previous Next

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

Configure Initiator

Salesforce | Initiate from Salesforce Flow

Start the Workflow using a Salesforce Flow.

You will need:

- The ability to add create Flows in Salesforce
- The ability to add HTTP callout actions to your Flow

Need help? [Learn more](#)

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6. Copy the provided webhook URL and paste that URL into an HTTP callout action in your Flow.

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

Configure Initiator

Salesforce | HTTP endpoint URL

HTTP endpoint URL

Send POST or GET requests to this URL endpoint from your Salesforce Flow to start the Alchemer Workflow. This is typically done as an HTTP callout action. [Learn more](#)

Salesforce Flow Public URL

`https://[Salesforce Flow Public URL].trayapp.io`

Fields

Add the list of fields you will pass to this initiator. Fields can be passed as any combination of query parameters and/or as JSON in the body of a POST request.

Fields *(optional)*

0



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7. To pass Custom Fields into your Workflow, define which fields the webhook should accept. Fields can be passed as any combination of query parameters, and/or as JSON in the body of a POST request. These fields can then used in Survey Invite steps, Send Email steps, or other workflow actions.

Configure Initiator

Fields

Add the list of fields you will pass to this initiator. Fields can be passed as any combination of query parameters and/or as JSON in the body of a POST request.

Fields *(optional)*

0

first_name

1

last_name

Add to Fields



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Important Information on Custom Fields

1. Custom Fields can be passed to Alchemer via POST or GET requests.

Key	Value	Description	...	Bulk Edit
<input checked="" type="checkbox"/> email	none@example.com			
<input checked="" type="checkbox"/> first_name	Justin			
Key	Value	Description		

Example GET Request

```
1 {
2   "email": "none@example.com",
3   "first_name": "Justin"
4 }
```

Example POST Request

2. Field that are not configured in Alchemer, but are still passed by the external system, will be ignored.

3. The request must be in a flat key-value pair structure. Alchemer will ignore any nested objects and arrays in the JSON body.

8. OPTIONAL: As an added security measure, you also have the ability to add custom header names and values when setting up the Custom Events Workflow initiator. This ensures the Workflow only initiates when pre-specified HTTP header key/value pairs are passed in.

Upon receiving an initiation request, we verify the presence and validity of the specified header. Requests with missing or invalid headers are dropped and ignored.

If a request is invalid, we will return the following 400 error message:

```
{
  "status_code": "400",
  "message": "Security validation failed.",
  "errors": [
    "Missing or invalid security headers."
  ]
}
```

Successful requests will return a 200 status code.

Configure Initiator

https://[redacted]@trayapp.io

Custom Fields

Add Custom Fields to define the fields this webhook should accept. Fields can be passed as any combination of query parameters and/or as JSON in the body of a POST request. [Learn more.](#)

Custom Fields *(optional)*

Warning: This field will send an empty array

Add to Custom Fields

Custom Headers

You may optionally add Custom Headers to secure your webhook and ensure that it can only be triggered when pre-specified HTTP header key/value pairs are passed in.

Custom Headers *(optional)*

security-check

Add Property To Custom Headers

Previous Save

9. Click "Save" to complete the initiator setup.

Configure Initiator

Salesforce | Setup complete

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

Previous Save

Merge Codes

When the webhook fires, custom fields are passed to Alchemer Workflow. After configuring this initiator, you can use these fields in merge codes, logic, and other Workflow steps.

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 this initiator?

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

Related Articles