

Initiate a Workflow When Specific Events Occur in Salesforce - Legacy

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

Overview

Alchemer Workflow's Salesforce initiator combines advanced survey and Workflow capabilities with Salesforce's powerful CRM platform, allowing you to automate business and sales processes and better close the loop with your customers and prospects.

Initiating Workflows in response to Salesforce event changes leads to smoother customer and prospect engagement, while speeding up your sales, onboarding, and support processes.

With the Salesforce initiator, you can:

- Initiate Workflows when Salesforce events occur. The Salesforce initiator can listen to two events types, "On Object Create" and "On Object Update".
- Choose from over 800 Salesforce objects, and initiate Workflows when any of these objects are created or updated. Here are some examples:
 - As a customer success manager, automatically initiate an onboarding Workflow when an Opportunity status is changed to "Won".
 - As a sales manager, automatically initiate a closed-lost analysis Workflow when an Opportunity status is changed to "Lost".
- Utilize pre-built event triggers to initiate Workflows when a Salesforce case is closed, or when a Salesforce Opportunity is Closed-Won or Closed-Lost.

Setup

⚠ Required Salesforce Permission for Tray.io Integration

Some customers are unable to authenticate with Salesforce via Tray.io because an additional Salesforce permission must be enabled in order for Tray to properly configure the connected app authentication.

To prevent authentication errors, ensure that the Salesforce user performing the Tray.io setup has the *Approve Uninstalled Connected Apps* permission.

This permission is required in addition to other standard Salesforce integration permissions and should be granted in your Salesforce profile or permission set before you begin the

Tray.io connection process.

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

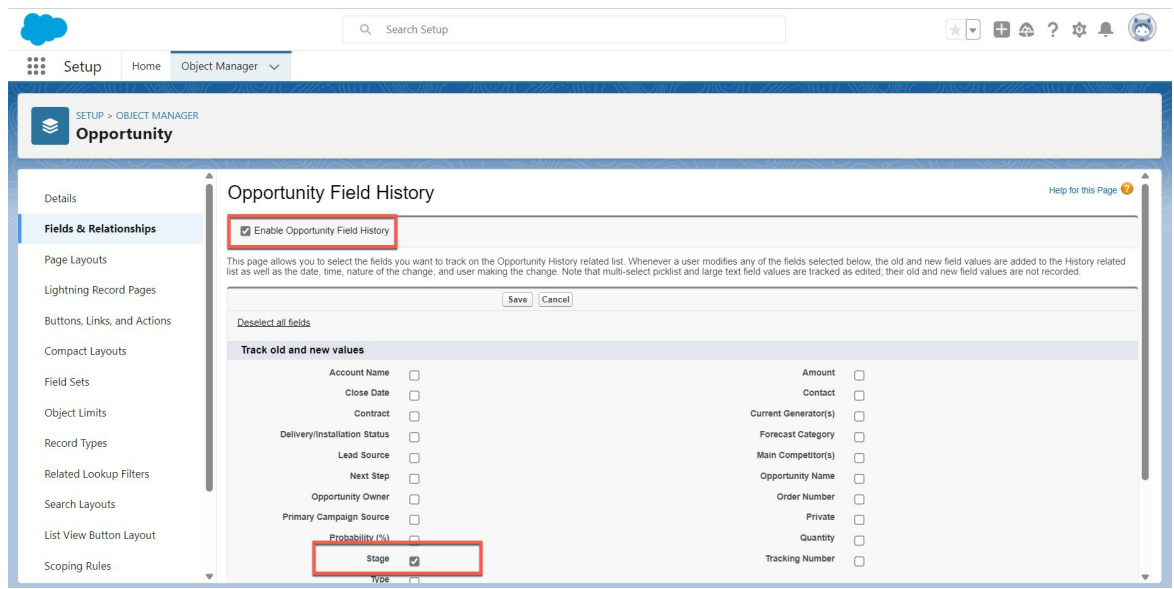
- API Enabled User
- Customize Application
- Manage Flows
- Run Flows
- Modify All Data
- Modify Metadata

These permissions are required by Salesforce because this initiator automatically creates a Flow in Salesforce that will trigger the Workflow. These are the permissions needed to create Flows in Salesforce. If you are not comfortable giving these permissions, you can create a Flow on your own and use the [Custom Webhook Initiator](#).

The Salesforce initiator is read-only and will NOT modify any Salesforce data.

Additional Requirements for Opportunity Closed Won or Lost Initiators

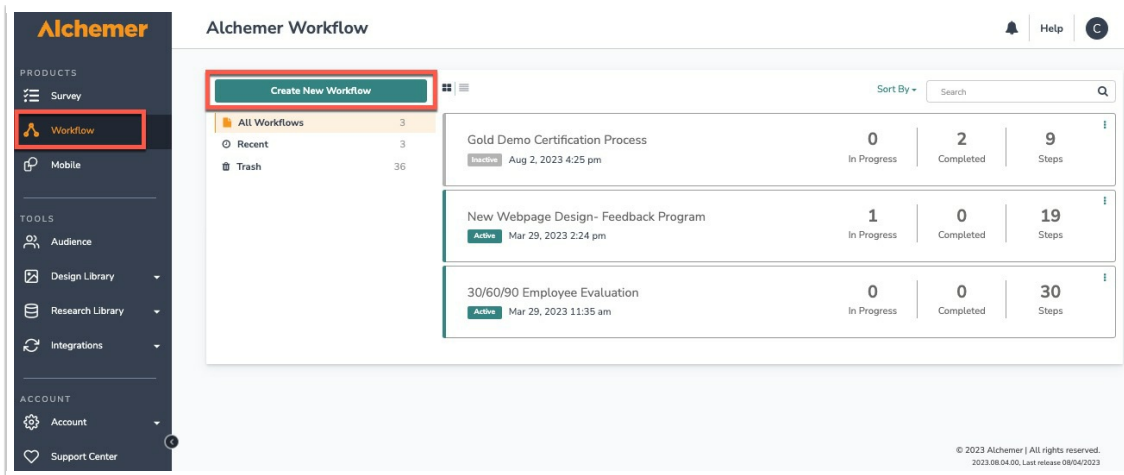
Customers using the Salesforce Opportunity Closed Won or Lost Initiators must enable field history for the Stage field for opportunities.



The screenshot shows the Salesforce Setup page for Opportunity Field History. The 'Enable Opportunity Field History' checkbox is checked and highlighted with a red box. Below it, the 'Track old and new values' section contains a list of fields with checkboxes. The 'Stage' checkbox is also checked and highlighted with a red box. The page includes a search bar at the top, a navigation menu on the left, and a 'Save' button.

In Salesforce, you can find this setting under Setup > Objects and Fields > Object Manager > Opportunity > Fields & Relationships. Ensure that both the "Stage" box and "Enable Opportunity Field History" box are checked.

1. Create a new Workflow.



2. Name your Workflow.

Create New Workflow

What would you like to name this Workflow?

Cancel Start Building

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

Select Initiator

Survey Listener When a given survey is completed	Share Link When a user clicks on a custom workflow link	Salesforce
Paylocity	Zendesk	Asana

Need Help? Next

4. Choose the Salesforce initiator that you would like to use.

Configure Initiator

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.

← Previous: Select Initiator
Next

5. Authenticate your Salesforce account. For additional guidance on authenticating a Salesforce account with Alchemer, click [here](#).

Configure Initiator

Authentication

Select a Salesforce account to connect to.


Salesforce connected
^

[Add a new account](#)

● ●

Cancel
Next

6. Depending on the selected Salesforce initiator, you may be required to choose specific records and fields for your initiator to listen to. Complete this section and continue.

 **Configure Initiator**

Select a record type*

Contact

Select at least one field*


Field

Choose an option

Previous

The records and fields available will vary depending on your level of access in Salesforce.

7. Click the "Finish" button to complete the Salesforce initiator step. Then click "Save".

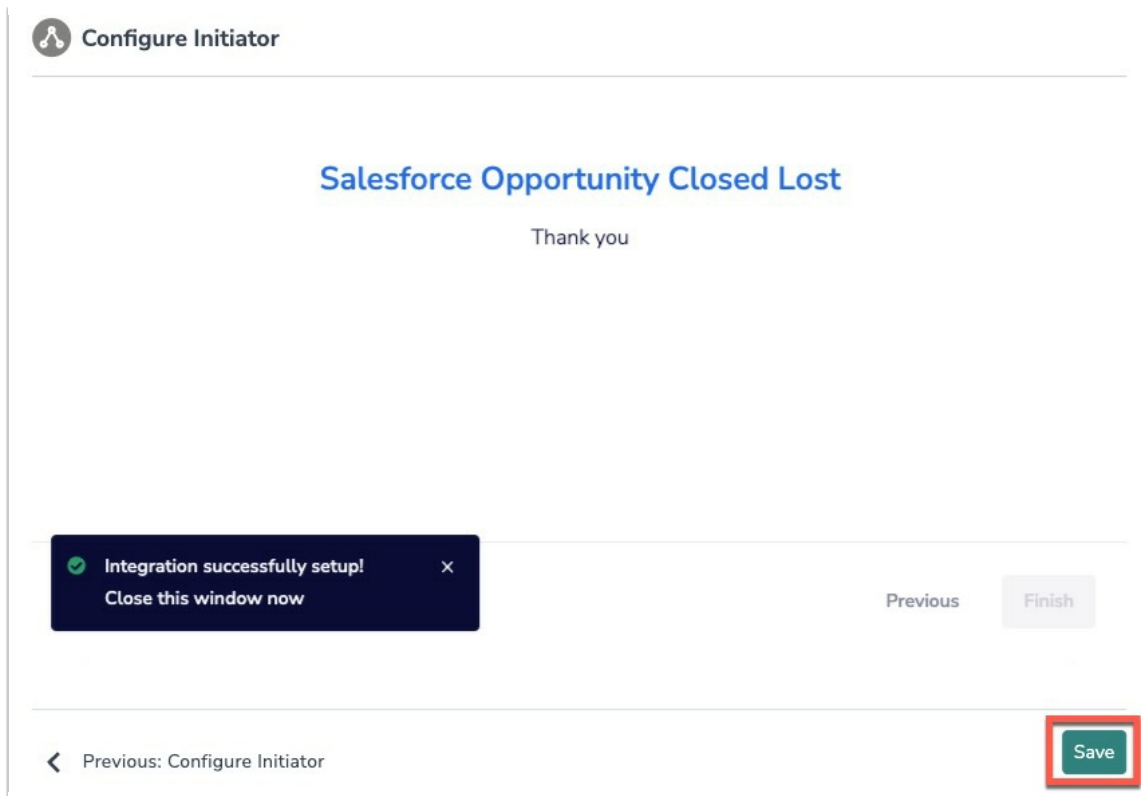
 **Configure Initiator**

Salesforce Opportunity Closed Lost

Thank you

Previous

[← Previous: Configure Initiator](#)



Merge Codes

When the webhook fires, Salesforce will pass the following 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](#).

- ⊕ Fields for Salesforce initiator - Case Closed
- ⊕ Fields for Salesforce initiator - Opportunity Closed Won and Opportunity Closed Lost
- ⊕ Fields for BigCommerce initiator - Case Closed

FAQs

- What permissions do I need within Salesforce to set-up and use the Salesforce initiator?
- What permissions do I need within Alchemer to set-up and use the Salesforce initiator?
- Can multiple Workflows initiate off the same Salesforce initiator?
- This initiator doesn't fit my use cases, or I want to provide feedback to the Alchemer

Product Team!

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