Initiate a Workflow When Specific Events Occur in Salesforce

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 an Salesforce Opportunity is Closed-Won or Closed-Lost.

Setup

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 <u>NOT</u> 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.

	Q, See	arch Setup	* •	🖩 🏟 ? 🌣 🐥 🁼
Setup Home Object	ct Manager 🗸			
	C DINET CATHER AND	MMC DIST(1776-3031070)		
SETUP > OBJECT MANAGER Opportunity				
Details	Opportunity Field His	story		Help for this Page 📀 💧
Fields & Relationships	Enable Opportunity Field History			
Page Layouts	This page allows you to select the fields y list as well as the date time nature of the	ou want to track on the Opportunity History related list. Whenever a user modifies any of the change, and user making the change. Note that multi-select picklist and large text field valu	fields selected below, the old and new field values are tracked as edited, their old and new field	ies are added to the History related values are not recorded
Lightning Record Pages		Save Cancel		
Buttons, Links, and Actions	Deselect all fields			
Compact Layouts	Track old and new values			
Field Sets	Account Name	0	Amount	
Object Limits	Close Date Contract		Contact	
	Delivery/installation Status	U	Senerator(s)	
Record Types	Lead Source	0	ompetitor(s)	
Related Lookup Filters	Next Step	Орра	tunity Name	
Search Layouts	Opportunity Owner		rder Number	
List View Button Layout	Primary Campaign Source		Private	
LISE VIEW DULLON LAYOUT	Probability (%)	-	Quantity	
Scoping Rules	Type	Trac	king Number	-
	туре	11		

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.

Alchemer	Alchemer Workflow	w			4	Help	C
PRODUCTS	Create New Workf	ow	n =	Sort By -	Search		۹
Mobile	 All Workflows Recent Trash 	3 3 36	Gold Demo Certification Process	0 In Progress	2 Completed	9 Steps	I
TOOLS Audience			New Webpage Design- Feedback Program	1 In Progress	0 Completed	19 Steps	I
Design Library Research Library			30/60/90 Employee Evaluation	0 In Progress	0 Completed	30 Steps	I
C Integrations ↓ ACCOUNT COUNT COUNT							
Support Center	•					ner All rights reserv 10, Last release 08/04/2	

2. Name your Workflow.

What would you like to name this Workflow?	
Closed Lost Workflow	

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

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

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

Record updated tarts the Alchemer Workflow when the selected Salesforce ecord 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 itarts the Alchemer Workflow when a Salesforce Opportunity s 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.

5. Authenticate your Salesforce account. For additional guidance on authenticating a Salesforce account with Alchemer, click here.

Authent	ication
Select a Salesforce ac	
Salesforce connected	^
Add a new	<u>account</u>

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.

🔥 Confi	gure Initiator	
Selec	t a record type*	I
Cor	ntact	~
	t at least one field* ield	
	Choose an option	~
••	Previous	Finish

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	Finish
Previous: Configure Initiator		Save

s	alesfor	ce Opr	ortunity	Closed	lost		
	accoror			closed	LUST		
			Thank you				
Integration successfully set	up!	×					
Close this window now					Pre	vious	Finish

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!

Related Articles