

# Alchemer Digital Connector

To use the Alchemer Digital Connector, you must have access to Alchemer Workflow and Alchemer Digital on your account. If you are interested in adding these capabilities to your Alchemer account please [contact us for more information](#).

The Alchemer Digital Connector combines the powerful targeting capabilities of Alchemer Digital with the advanced automation features in Alchemer Workflow.

With the Alchemer Digital Connector you can initiate workflows in Alchemer Workflow when an event or series of events occur on your mobile app.

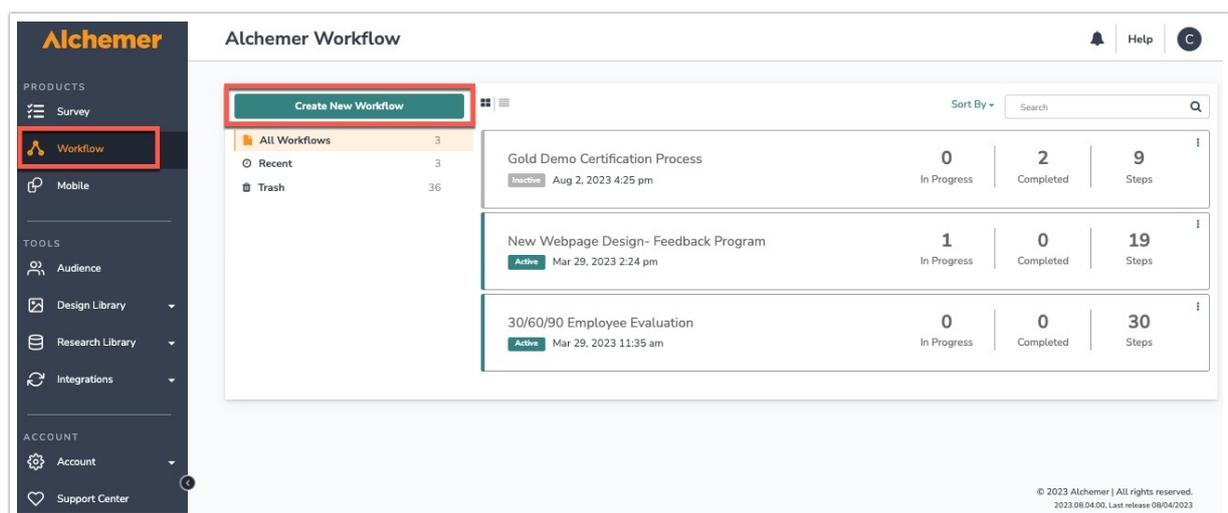
## Alchemer Digital Connector Configuration

There are two parts to configure an Alchemer Digital Workflow Connector:

1. Initiator Configuration: In Alchemer Workflow, configure the initiator that will fire based on targeting conditions set in your mobile app.
2. Event/Targeting Configuration: In Alchemer Digital, configure the events, actions, and targeting that will trigger the workflow initiator.

### Initiator Configuration in Alchemer Workflow

1. Create a new workflow in Alchemer Workflow.



2. Name your workflow. Then click "Start Building".

## Create New Workflow

\* What would you like to name this Workflow?

Cancel

Start Building

3. After creating a new workflow, select the Alchemer Digital initiator.

### Select Initiator

**Alchemer**  
Alchemer integrations

**Alchemer Digital**  
Integration with Alchemer Digital

**Salesforce**  
Salesforce for the alchemer description

**Scheduled**  
Start the Alchemer Workflow on a schedule

**Share Link**  
When a user clicks on a custom workflow link

**Survey Listener**  
When a given survey is completed

Need Help? Next

4. Select "Digital Interaction."

### Select Action

**Digital Interaction**  
Creates a new digital interaction that starts the workflow.

Need Help? Previous Next

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

You will need your Alchemer Digital API key to complete configuration.

## Configure Initiator

### Digital | Digital interaction

Creates a new digital interaction that starts the workflow.

**You will need:**

- Your Alchemer Digital API key

Need help? [Learn more](#)

v241206



Previous

Next

6. Create a new authentication with Alchemer Digital by naming the new authentication and providing your Alchemer Digital API key.



You can find your Alchemer Digital API key in Account Settings > Your Profile.

The screenshot shows the 'Account Settings > Your Profile' page in the Alchemer Practice Dashboard. The page is divided into two main sections: 'Account Settings' on the left and 'Profile' on the right. The 'Profile' section contains several input fields: 'Name', 'Email - also used for your Gravatar', 'Your Work Phone', 'Time Zone' (set to GMT-10:00 Hawaii), and 'Professional Role' (set to Product Management). Below these fields is a 'Save Settings' button. The 'API Keys' section shows a list of API keys, with one key named 'ALCHEMER DIGITAL API' created on 11/24/2024. There is an 'Add New' button next to the API keys section. The 'Password' section has a 'Change Password' button.

For more information on using the Alchemer Digital API, [refer to this document](#).

*Note: Billing contacts also have access to API keys via Account Settings > Company Account Overview.*

7. *Optional.* Select Production or Staging. Then click "Next".

The screenshot shows the 'Configure Initiator' dialog box. The title is 'Configure Initiator'. Below the title, there is a section for 'Digital | Digital API key' with the instruction 'Enter your Digital API key.' A dropdown menu shows 'Alchemer Digital connected' and 'Select your Alchemer Digital API key'. Below this is an 'Environment (optional)' section with a search bar 'Type to search' and a list of options: 'Production' and 'Staging'. At the bottom right, there are 'Previous' and 'Next' buttons.

8. Select the Alchemer Digital app where you want to create the interaction that will trigger the workflow.

You can only select one app. So, you will need to create two separate workflows and corresponding initiators for an app on both iOS and Android platforms.

**Configure Initiator**

Digital | Select app

Select the app you want to create the interaction within.

App\*

Alchemer Practice Dashboard

9. Name the workflow interaction, so that you can locate the interaction later in Alchemer Digital. Then select your setup action.

**Configure Initiator**

Digital | Digital interaction

Enter a name to create a new digital interaction. The interaction name cannot be changed once created. You may also update the available initiator fields of the existing interaction.

Interaction name\*

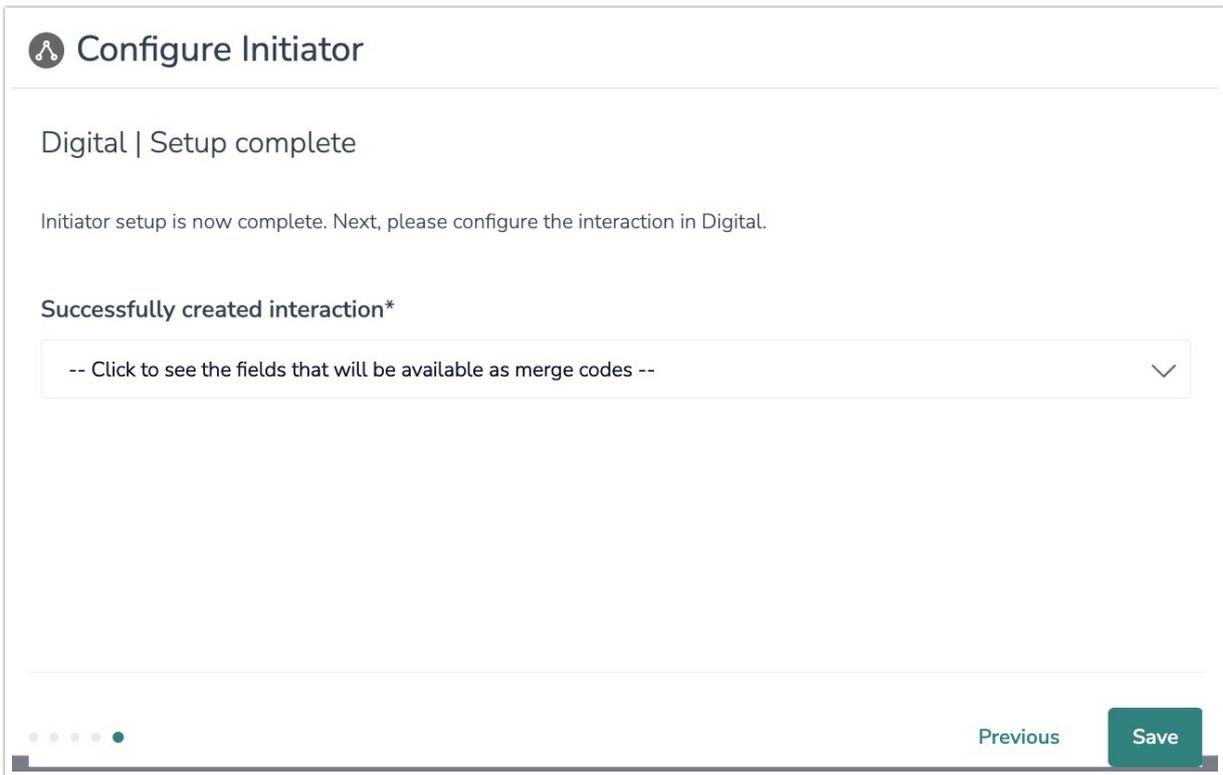
Demo WF

Select setup action\*

Create new Digital interaction

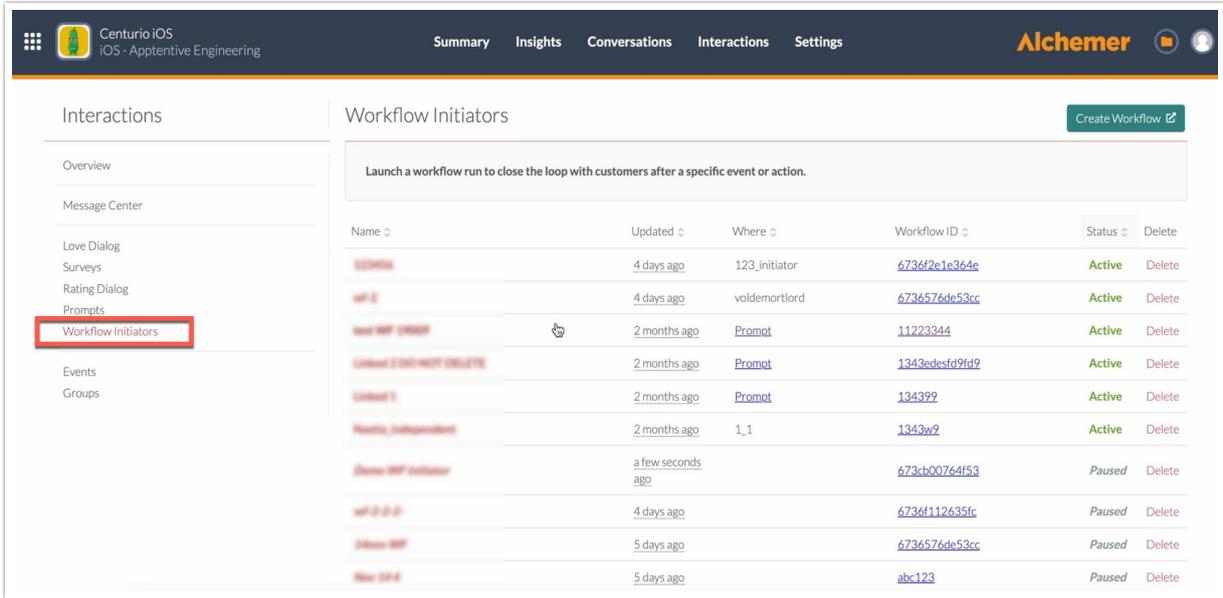
Previous Next

10. In another window, sign into the Alchemer Digital app. Now you will need to configure the initiator targeting in Alchemer Digital.



## Targeting Configuration in Alchemer Digital

1. In the Alchemer Digital Interactions tab, select "Workflow Initiators".



2. Select the workflow interaction from the list. The interaction name is the name you provided earlier when configuring the initiator (see step 7 above).

The screenshot shows the Alchemer interface with a navigation bar at the top containing 'Summary', 'Insights', 'Conversations', 'Interactions', and 'Settings'. The main content area is divided into two sections: 'Interactions' on the left and 'Workflow Initiators' on the right. The 'Workflow Initiators' section has a 'Create Workflow' button and a descriptive text: 'Launch a workflow run to close the loop with customers after a specific event or action.' Below this is a table with columns for Name, Updated, Where, Workflow ID, Status, and Delete. The 'Demo WF Initiator' is highlighted with a red box.

Name	Updated	Where	Workflow ID	Status	Delete
[Redacted]	4 days ago	123_initiator	6736f2e1e364e	Active	Delete
[Redacted]	4 days ago	voldemortlord	6736576de53cc	Active	Delete
[Redacted]	2 months ago	Prompt	11223344	Active	Delete
[Redacted]	2 months ago	Prompt	1343edestd9fd9	Active	Delete
[Redacted]	2 months ago	Prompt	134399	Active	Delete
[Redacted]	2 months ago	1_1	1343w9	Active	Delete
<b>Demo WF Initiator</b>	a few seconds ago		673cb00764f53	Paused	Delete
[Redacted]	4 days ago		6736f112635fc	Paused	Delete
[Redacted]	5 days ago		6736576de53cc	Paused	Delete
[Redacted]	5 days ago		abc123	Paused	Delete

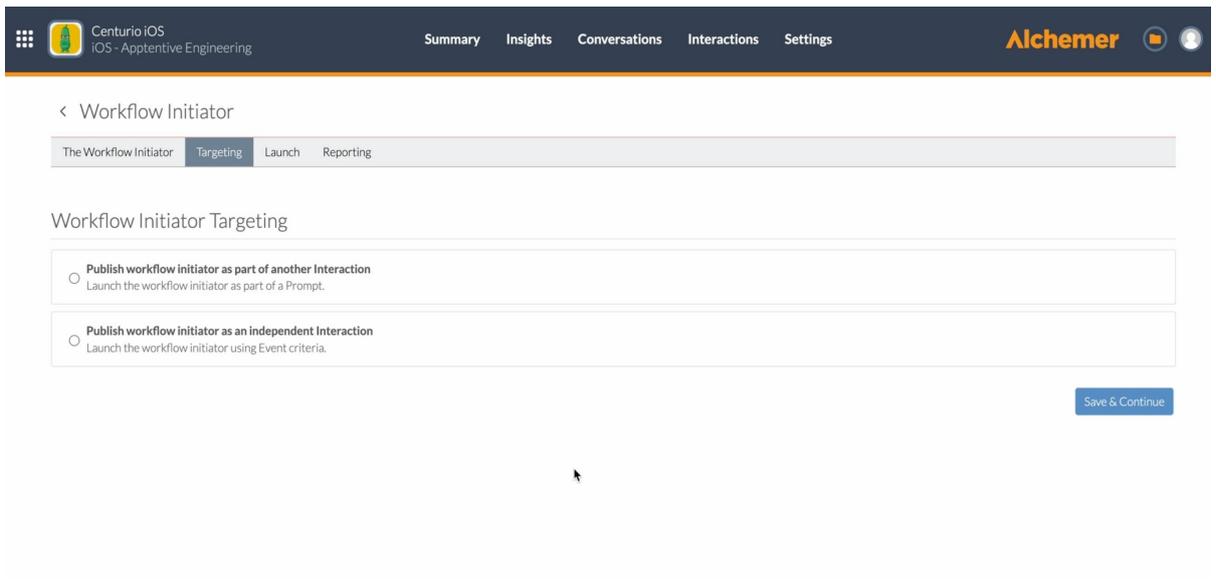
If you need to pause or delete a digital initiator you should do it from this screen and then also update the initiator in Alchemer Workflow.

3. Name the interaction. On this screen, you can also see the Workflow Name and Workflow ID that this initiator is tied to.

The screenshot shows the 'Workflow Initiator' configuration screen. At the top, there's a navigation bar with 'Summary', 'Insights', 'Conversations', 'Interactions', and 'Settings'. Below the navigation bar, there's a breadcrumb trail: '< Workflow Initiator'. Underneath, there are tabs: 'The Workflow Initiator', 'Targeting', 'Launch', and 'Reporting'. The 'Interaction Name' field contains 'Demo WF'. Below it, there's a note: 'Pick a descriptive name. This will not show on devices.' The 'Connected Workflow' section has two fields: 'Workflow Name' (Demo WF Initiator) and 'Workflow ID' (673cb00764f53). There's an 'Edit Workflow' link and a note: 'User data will be automatically passed into your workflow for use in merge codes and logic conditions. Learn more.' At the bottom right, there's a 'Save & Continue' button.

4. Define the targeting for your initiator.

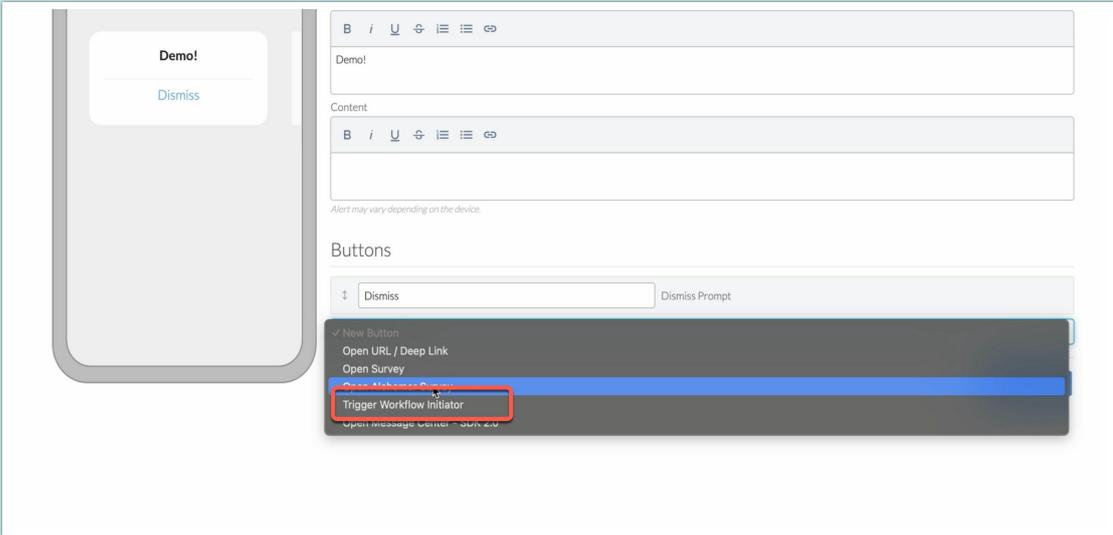
Take a thoughtful approach when configuring your targeting settings. We recommend starting by targeting only a small segment of your app users. Avoid broad triggers like "on app open" or "user logged in." Instead, be granular and intentional in defining your target audience, focusing on your specific use case.



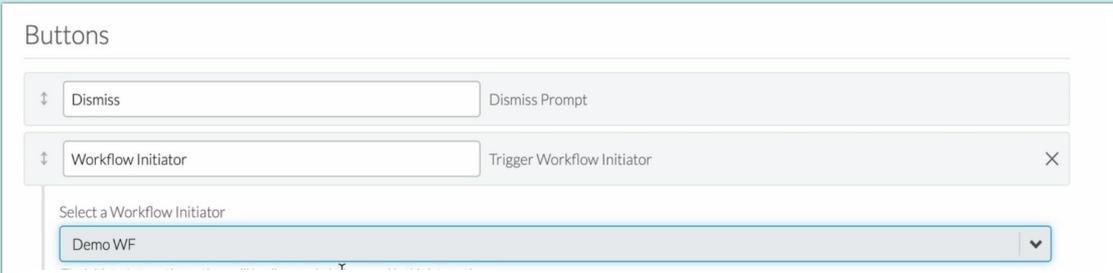
**There are two ways to initiate a Workflow via Alchemer Digital:**

- 1. Initiate the workflow via a Prompt. [Configure the Prompt like your normally would](#), but you must also do the following:

To initiate a workflow via a Prompt, you'll need to create a button that triggers a Workflow Initiator.



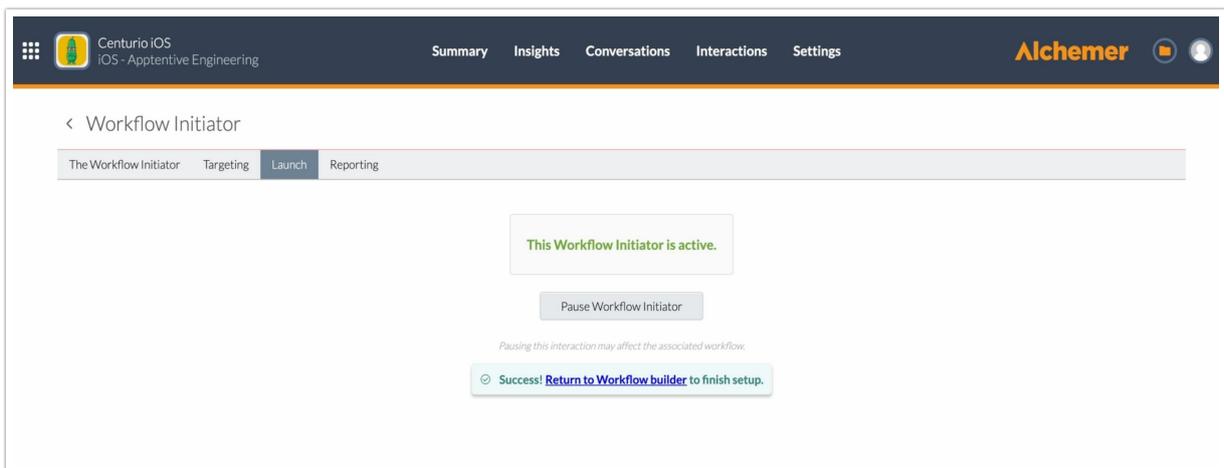
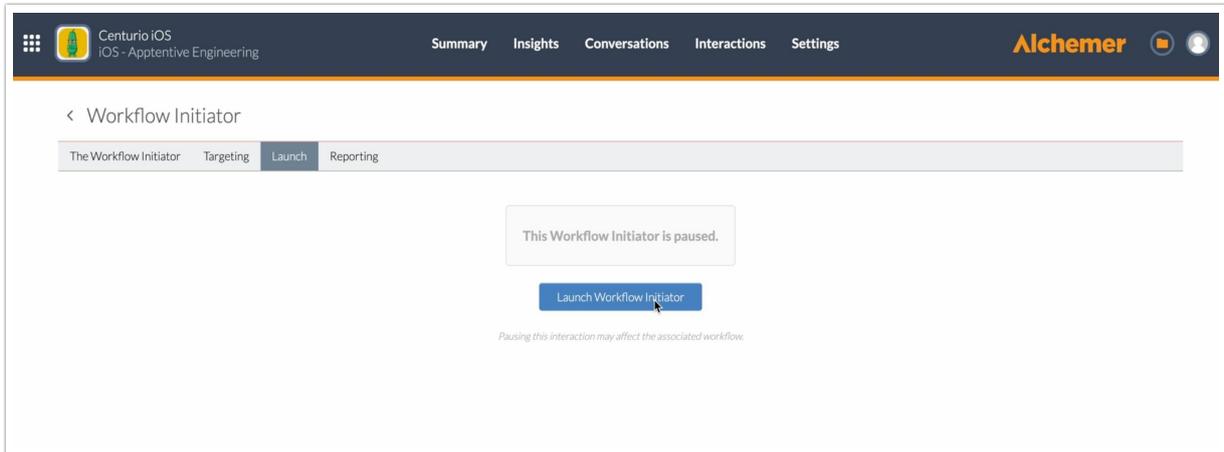
Give your button a label, and select the right workflow initiator.



- 2. Initiate the workflow using independent event criteria and targeting. For example, after a customer completes checkout.

For more details on setting up targeting in Alchemer Digital, [refer to our more detailed targeting documentation](#).

5. Once targeting is complete in Alchemer Digital, click "Launch Workflow Initiator".



## Launching the Workflow

1. Return to Alchemer Workflow and click save to configure the Alchemer Workflow initiator. If successful, after hitting save you'll see the message "Integration Successfully Setup!".

## Configure Initiator

### Alchemer Digital | Create Interaction

After you save you can update the targeting in the Alchemer Digital application for this Initiator.  
Creating the Alchemer Digital Workflow Interaction. Click Save once the loading bar disappears.

Selected Alchemer Digital App:*(optional)*

App Title: Centurio iOS | App Platform: iOS

Integration successfully setup!  
Close this window now

Previous Save

2. After configuring the initiator in Alchemer Workflow and setting up that initiators targeting in Alchemer Digital, return to Alchemer Workflow to build out your workflow steps.

For more information on building in Alchemer Workflow, [refer to our detailed workflow documentation.](#)

### Demo WF

BUILD TEST MONITOR

Activate  0 Completed 0 In Progress

Settings Publish

#### Workflow Timeline

- 0 Initiate Workflow
  - Alchemer Digital
    - Action: [Digital] [WF Initiator] When the user meets targeting cr
- 1 Send Email

Complete

Steps

Search for Steps

Collect Feedback

- Survey
- Survey Invite

Communicate

- Send Email

Orchestrate

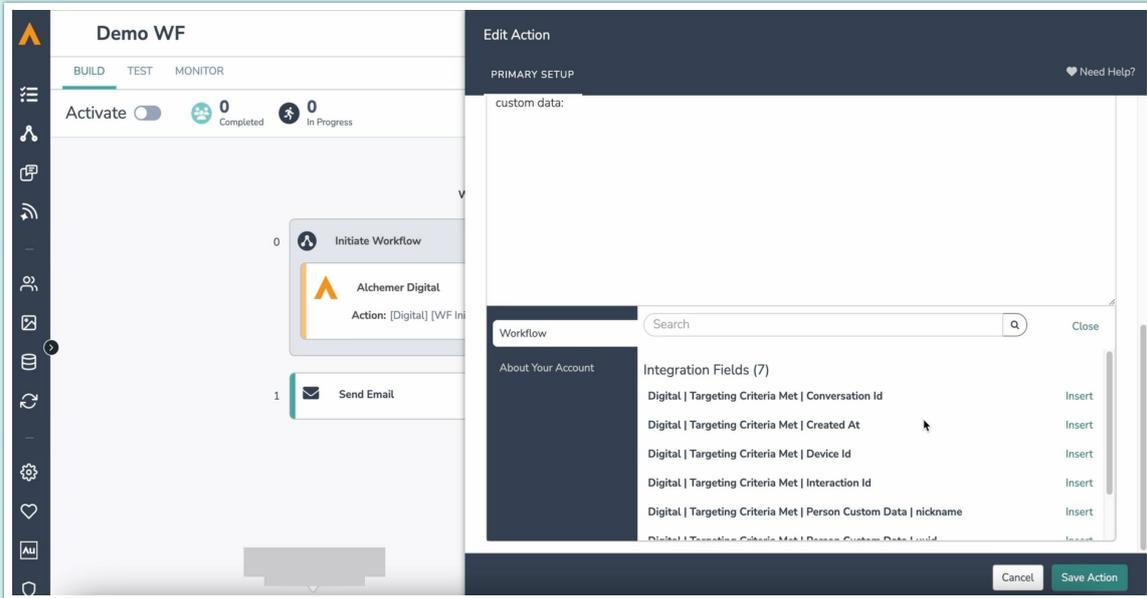
- Delay
- If/Else Logic
- Stop

Connections

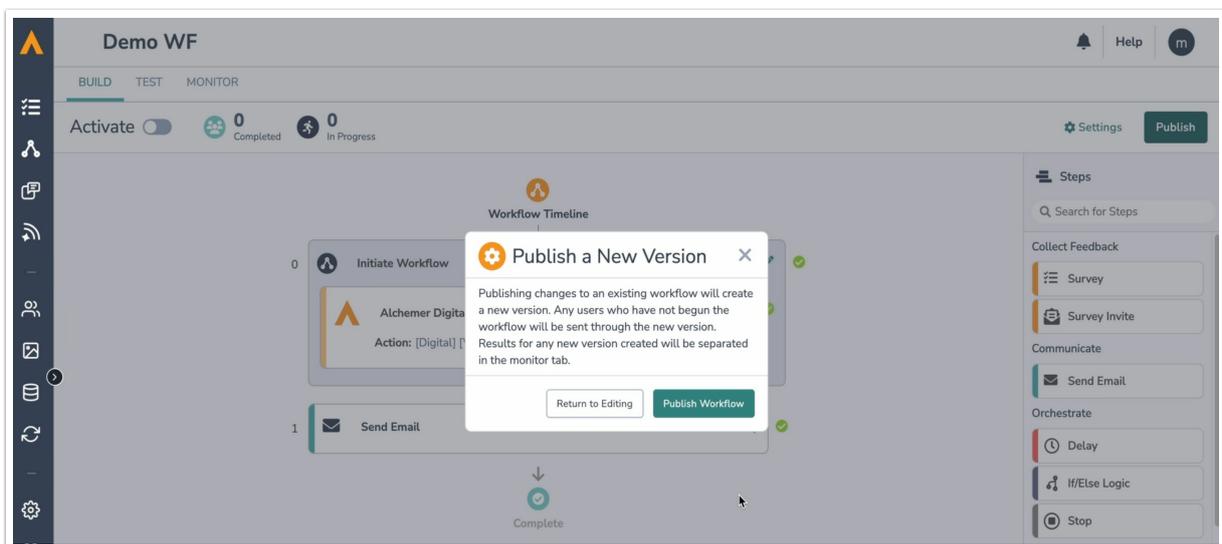
- Microsoft Teams

## Merge Codes

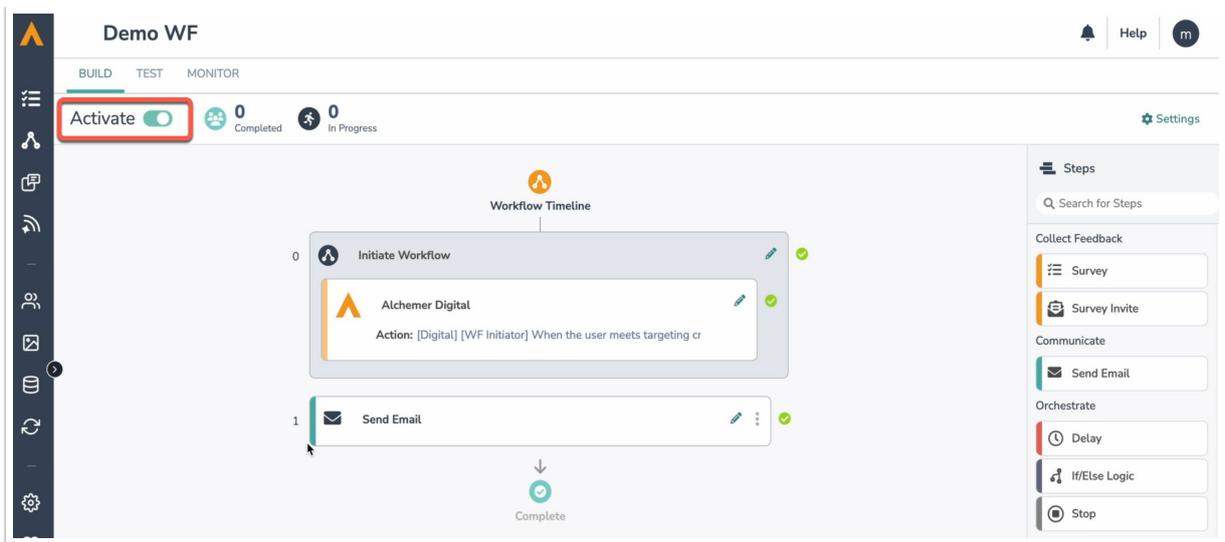
After completing the initiator, fields from Alchemer Digital will be available as merge codes in Alchemer workflow. These merge codes can be added to workflow steps, like a Send Email step. [For more information on using merge codes in Alchemer Workflow, refer to this documentation.](#)



3. After building out your Workflow. Click "Publish" in the top right corner. Then click "Publish Workflow".



4. Then toggle "Activate" to on (green) in the top left corner.



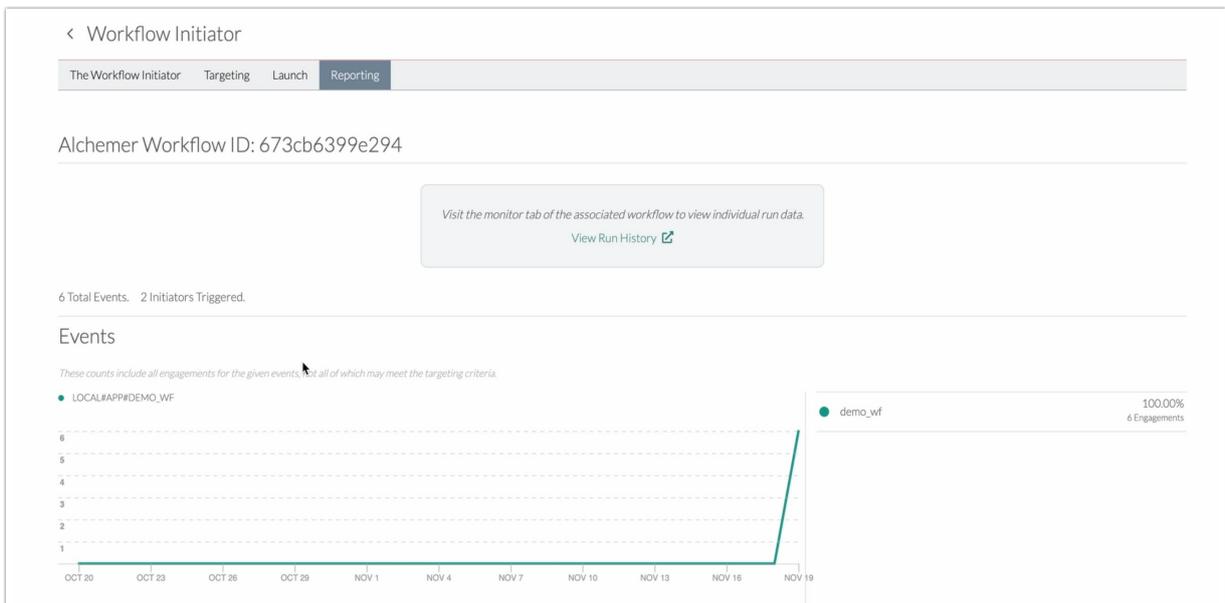
## Reporting

You can access reporting data in both Alchemer Digital and Alchemer Workflow.

### Reporting In Alchemer Digital

In the Reporting Tab for your workflow initiator, you can track how many times the selected events occurred and how many times the initiator was triggered.

Reporting reflects the number of events triggered, but it doesn't necessarily correlate with the number of workflows executed.



### Helpful Reporting Tip

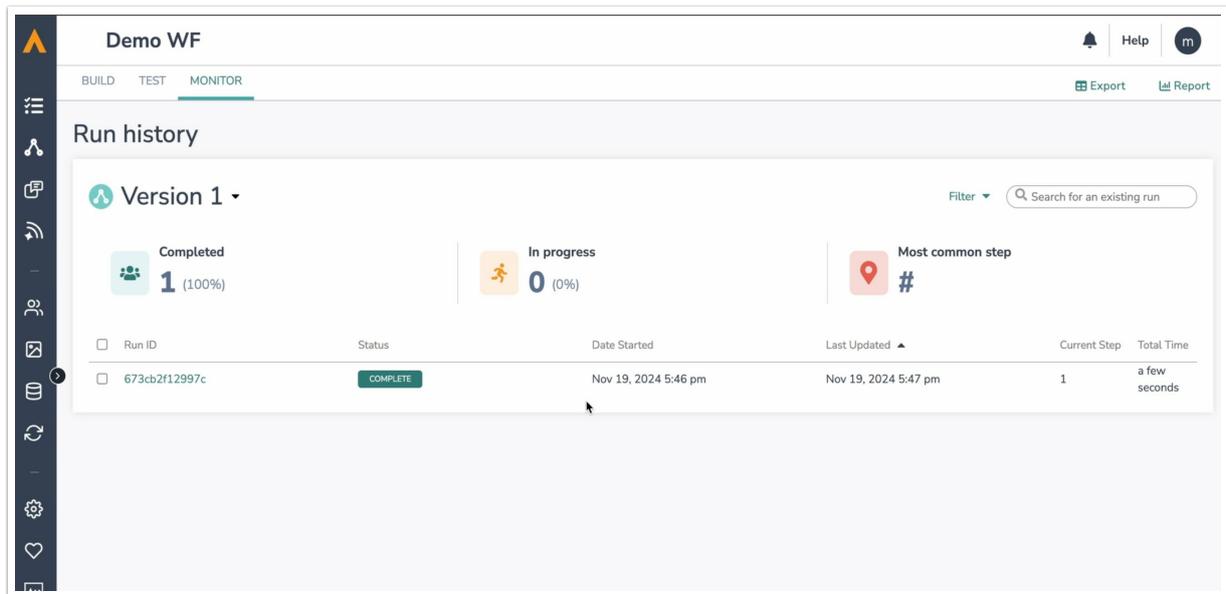
If you linked your initiator to a specific event or Prompt, you will have access to additional metrics tied to that event or Prompt. This helps with troubleshooting and provides valuable insights. Those additional metrics can be found in the Reporting tab for that event or Prompt,

rather than in the reporting for the workflow initiator.

## Reporting in Alchemer Workflow

You can view and monitor workflow runs in the Monitor tab in Alchemer Workflow.

For information on Reporting in Alchemer, [refer to this documentation](#).



The screenshot displays the 'Monitor' tab for a workflow named 'Demo WF'. The 'Run history' section shows 'Version 1' with a search bar and filter options. Summary statistics indicate 1 completed run (100%) and 0 in progress runs (0%). A table below lists the run details:

Run ID	Status	Date Started	Last Updated	Current Step	Total Time
673cb2f12997c	COMPLETE	Nov 19, 2024 5:46 pm	Nov 19, 2024 5:47 pm	1	a few seconds

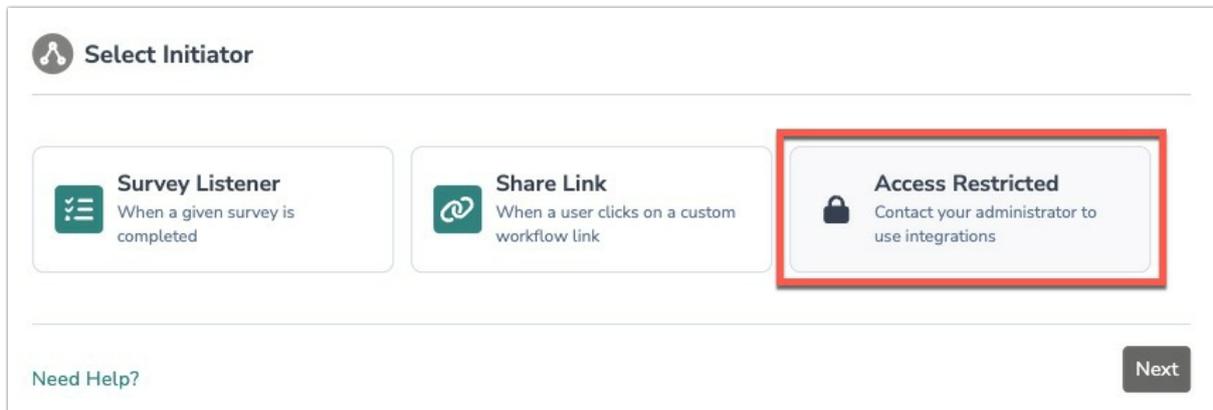
## FAQ

### How does cloning work? What would happen if I cloned a Prompt that is tied to an Alchemer Digital Workflow Initiator?

Everything would be cloned, except the Digital initiator. You would need to reconfigure that part of the prompt.

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

1. The Integration Manager Permission is required to set-up and use the Twilio integration. If you don't have this permission you will see the following message when selecting an initiator:



The screenshot shows the 'Select Initiator' dialog box with three options: 'Survey Listener', 'Share Link', and 'Access Restricted'. The 'Access Restricted' option is highlighted with a red border and contains the message: 'Contact your administrator to use integrations'. A 'Next' button is visible at the bottom right.

2. To grant this permission to someone on your team, go to the left-side product navigation and select the Account drop-down, then click on the user management tab.

3. Then select the Users tab under User Management.

4. Click your username or the username for another member of your team.
5. Scroll down to the Permissions section and check if the Integration Manager box is checked. If you are an admin you can check the box for other members of your team.

## Permissions

- Account Admin  
Note: You have reached your administrator limit. To purchase additional admin seats, contact our [Sales Team](#).
- Integration Manager — User can add and remove integrations from the account
- Restrict API Access — User cannot access the API  
API Key: This user does not have an API key. A new key can be created under [API settings](#).
- Restrict Granting of Support Access — User cannot allow SurveyGizmo Support to access this account

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