Alchemer Workflow Zendesk Integration

Overview

Zendesk is a customer service and support platform used by organizations to manage customer interactions, support tickets, and user data.

The Alchemer integration with Zendesk supports getting users, updating users, getting tickets, updating tickets, and creating tickets. The Alchemer Zendesk integration allows Alchemer to use information from Zendesk to get data, personalize workflow paths, enrich routing logic, create merge codes, and update information in Zendesk without manual intervention.

Common uses for the Alchemer Zendesk integration

- Personalize workflow steps with information in Zendesk
- Use Zendesk information in workflow logic
- Automate data retrieval and updates between Alchemer and Zendesk
- Reduce manual data entry and record maintenance
- Keep Zendesk records synchronized with responses collected in Alchemer
- Automatically create and update Zendesk users and tickets from workflows

What can the Alchemer Zendesk integration do?

- Get user
- Update user
- Get ticket
- Update ticket
- Create ticket

You will need

- Zendesk account subdomain
- An Alchemer plan that includes integrations and the Integration Manager permission enabled.
    - Contact us if you are unsure if your plan includes integrations.

Setup Alchemer Zendesk integration in workflow

Zendesk | Get user

You will need:

- Zendesk account subdomain

- Fields containing a unique identifier for the user

Configure the action

1. Open your workflow in **Workflow builder**.
2. On the right side, drag and drop the Zendesk connection where you want the action to trigger.
3. In the connection box, click the pencil icon in the top right corner.
4. Select **Zendesk | Get user.**
5. **Zendesk | Authentication:** Select an existing authentication or create a new authentication.
6. **Zendesk | Find user:** Select the fields in this workflow that contain the values you want to use to find the specific user record in Zendesk.
7. Save the action.

Status codes

- 200: A single record was successfully found
- 201: More than one record was found. The first record is used for the values returned to Alchemer
- 202: Query ran successfully, but no records were found
- 400: The external integration returned an error

Zendesk | Update user

You will need:

- Zendesk account subdomain
- Fields containing the identifier for the user
- Fields containing information to update the user

Configure the action

1. Open your workflow in **Workflow builder**.
2. On the right side, drag and drop the Zendesk connection where you want the action to trigger.
3. In the connection box, click the pencil icon in the top right corner.
4. Select **Zendesk | Get user**
5. **Zendesk | Authentication:** Select an existing authentication or create a new authentication.
6. **Zendesk | Find user:** Select the fields in this workflow that contain the values you want to use to find the specific user record in Zendesk.
7. **Zendesk | Update user with survey data:** Fields in this workflow that you would like to use to update the Zendesk user field.

8. Save the action.

Status codes

- 200: A single record was successfully found
- 400: The external integration returned an error

Zendesk | Get ticket

You will need:

- Zendesk account subdomain
- Fields containing the identifier for the ticket

Configure the action

1. Open your workflow in **Workflow builder**.
2. On the right side, drag and drop the Zendesk connection where you want the action to trigger.
3. In the connection box, click the pencil icon in the top right corner.
4. Select **Zendesk | Get ticket**
5. **Zendesk | Authentication:** Select an existing authentication or create a new authentication.
6. **Zendesk | Find ticket:** Select the fields in this workflow that contain the values you want to use to find the specific ticket record in Zendesk.
7. Save the action.

Status codes

- 200: A single record was successfully found
- 201: More than one record was found. The first record is used for the values returned to Alchemer
- 202: Query ran successfully, but no records were found
- 400: The external integration returned an error

Zendesk | Update ticket

You will need:

- Zendesk account subdomain
- Fields containing the identifier for the ticket
- Fields containing information to update the ticket

Configure the action

1. Open your workflow in **Workflow builder**.
2. On the right side, drag and drop the Zendesk connection where you want the action to trigger.

3. In the connection box, click the pencil icon in the top right corner.

4. Select **Zendesk | Update ticket**

5. **Zendesk | Authentication:** Select an existing authentication or create a new authentication.

6. **Zendesk | Find ticket:** Select the fields in this workflow that contain the values you want to use to find the specific ticket record in Zendesk.

7. **Zendesk | Update ticket with workflow data:** Fields in this workflow that you would like to use to update the Zendesk ticket field.

8. Save the action.

Status codes

- 200: Successfully updated ticket.
- 201: Query ran successfully but no tickets were found.
- 202: Multiple tickets were found. Please update your query to only return 1 ticket.
- 400: The external integration returned an error.

Zendesk | Create ticket

You will need:

- Zendesk account subdomain
- Fields containing information to create the ticket

Configure the action

1. Open your workflow in **Workflow builder**.

2. On the right side, drag and drop the Zendesk connection where you want the action to trigger.

3. In the connection box, click the pencil icon in the top right corner.

4. Select **Zendesk | Create ticket**

5. **Zendesk | Authentication:** Select an existing authentication or create a new authentication.

6. **Zendesk | Create ticket:** Select the fields in this workflow that contain the values you want to use to create the ticket in Zendesk.

7. **Zendesk | Get data back:** Select the fields that you would like to get back.

8. Save the action.

Status codes

- 200: Successfully created ticket
- 400: The external integration returned an error.

Testing and Troubleshooting

Testing and Validation

How to test

- Trigger the workflow and monitor individual runs in monitor tab in your workflow
    - Click on individual workflow runs to see metadata outputs
- Confirm the expected update or retrieval occurs in Zendesk.
- Use metadata for verification and debugging.

How to verify results

- Check the impacted record in Zendesk.
- Ensure retrieved or updated values match expectations.

Monitoring Integration Activity

Where to find logs

- Go to **Monitor**
- Select a the integration step you want to inspect.

What logs display

- Input/Output

Troubleshooting

Authentication issues

- Incorrect or expired credentials
- Missing permissions in Zendesk

Lookup failures

- Invalid identifier values
- No matching records

Mapping errors

- Unsupported or invalid fields
- Incorrect formatting

API errors

- Validation issues
- Endpoint restrictions

FAQs

What permissions do I need?

Integration Manager in Alchemer and API permissions in Zendesk.

When does the integration run?
When the workflow triggers and reaches the integration step.
Can I use multiple Zendesk actions in one workflow?
Yes. Actions can work independently or together.
Why isn’t my data updating?
Check the Monitor tab for lookup issues, mapping problems, or API errors.
What if I need additional functionality?
Contact Alchemer Support for enhancement requests.

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