Alchemer Workflow Zendesk Integration

> The Alchemer Workflow Zendesk Integration is available for purchase as an add-on. If you are interested in purchasing, please contact us for more information.

Overview

With the Zendesk Integration for Alchemer Workflow you can:

- **Get Zendesk Ticket Record:** Look up a Zendesk ticket by TicketID or other field. Then pull information from that ticket into a workflow.
- **Get Zendesk User Record:** Look up a Zendesk user by user email or other field. Then pull information from that user into your workflow.
- **Update Zendesk Ticket:** Update a Zendesk ticket with survey response data. Jump to section.
- **Update Zendesk User Record:** Update a Zendesk user record with survey response data.

Adding a Zendesk Step to your Workflow

1. Create a Workflow in Alchemer and select your initiator.

> For more information on building Workflows in Alchemer refer to the following documentation:
> - Getting Started with Alchemer Workflow
> - Building a Workflow

2. When you are ready to add the Zendesk step to your Workflow, drag the Zendesk step from the Step Library under Connections.
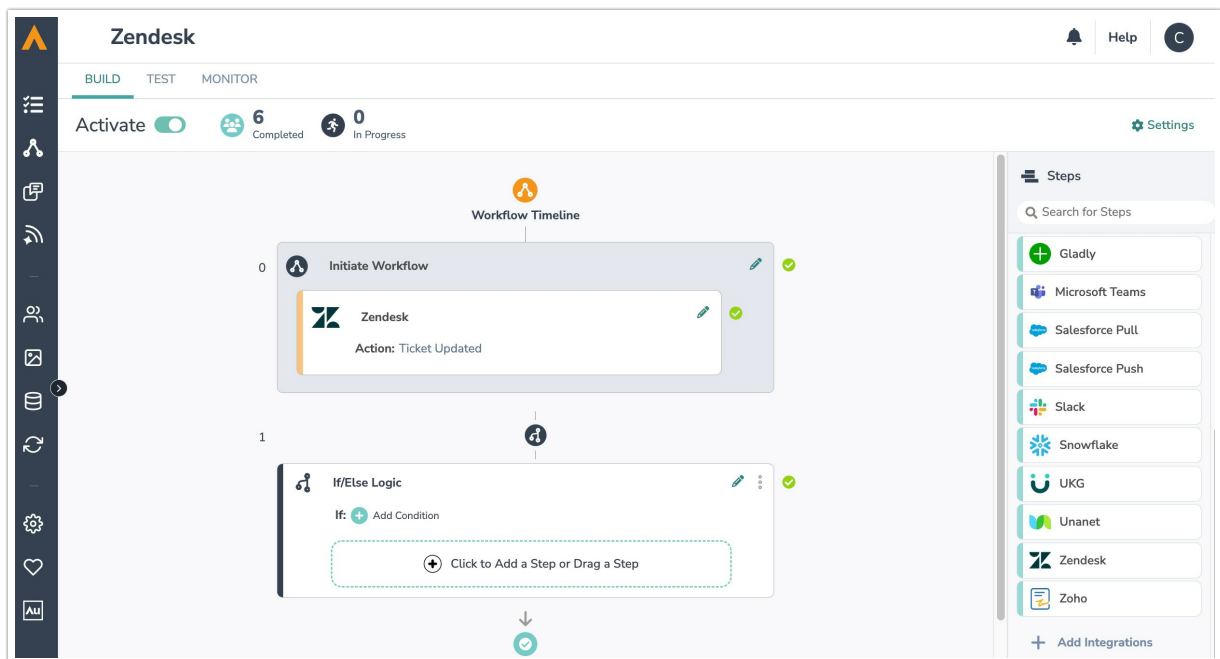
3. Click the pencil icon to configure your Zendesk integration step.
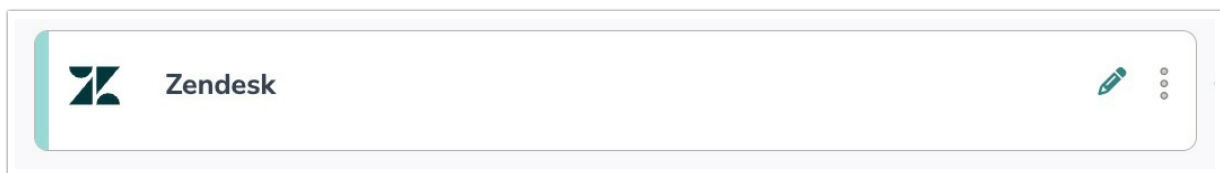
4. Select Zendesk as your integration and then select the action you would like to perform

- **Get Zendesk Ticket Record:** Look up a Zendesk ticket by TicketID or other field. Then pull information from that ticket into your workflow. Jump to section.
- **Get Zendesk User Record:** Look up a Zendesk user by user email or other field. Then pull information from that user into your workflow. Jump to section.
- **Update Zendesk Ticket:** Update a Zendesk ticket with survey response data. Jump to section.
- **Update Zendesk User Record:** Update a Zendesk user record with survey response data. Jump to section.

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Select Action

Select the action you would like to perform.

Update ticket
Update a user in Zendesk

Update user
Update a user in Zendesk

Get ticket
Get a ticket from Zendesk

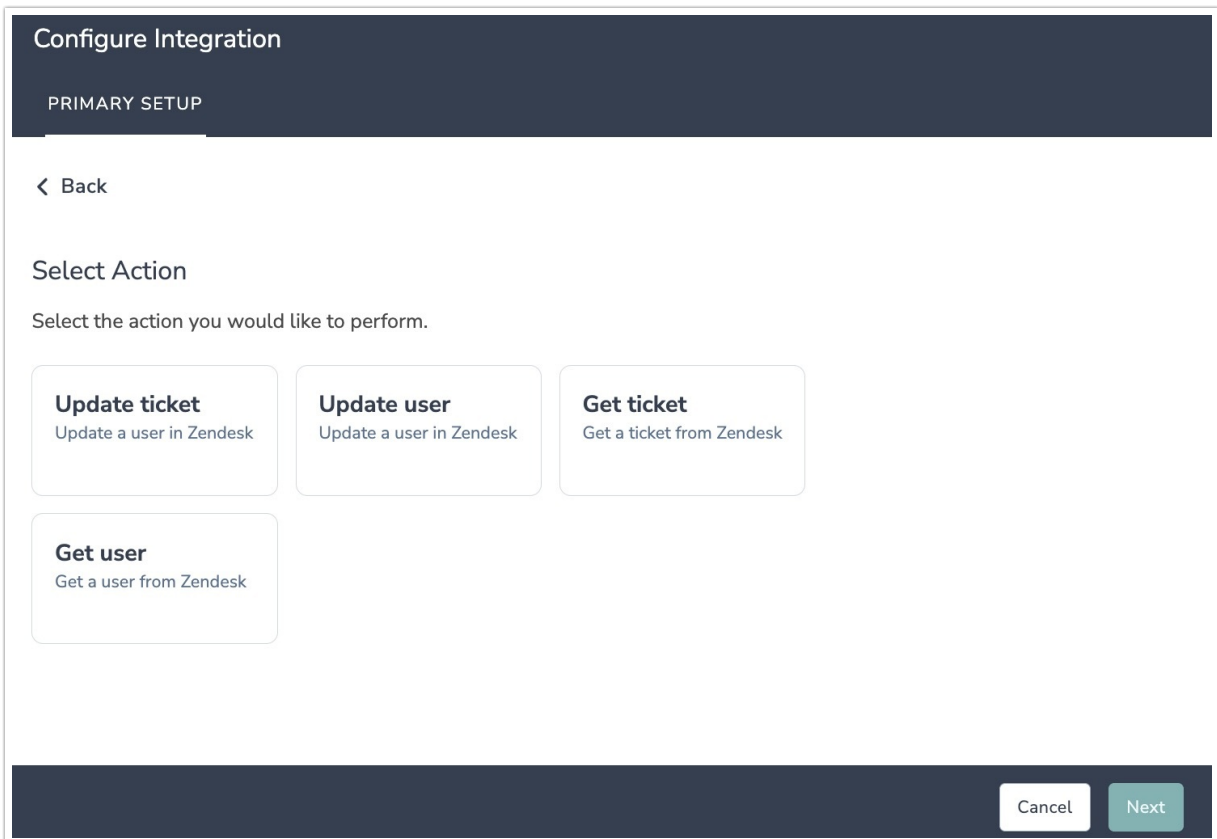**Get user**
Get a user from Zendesk
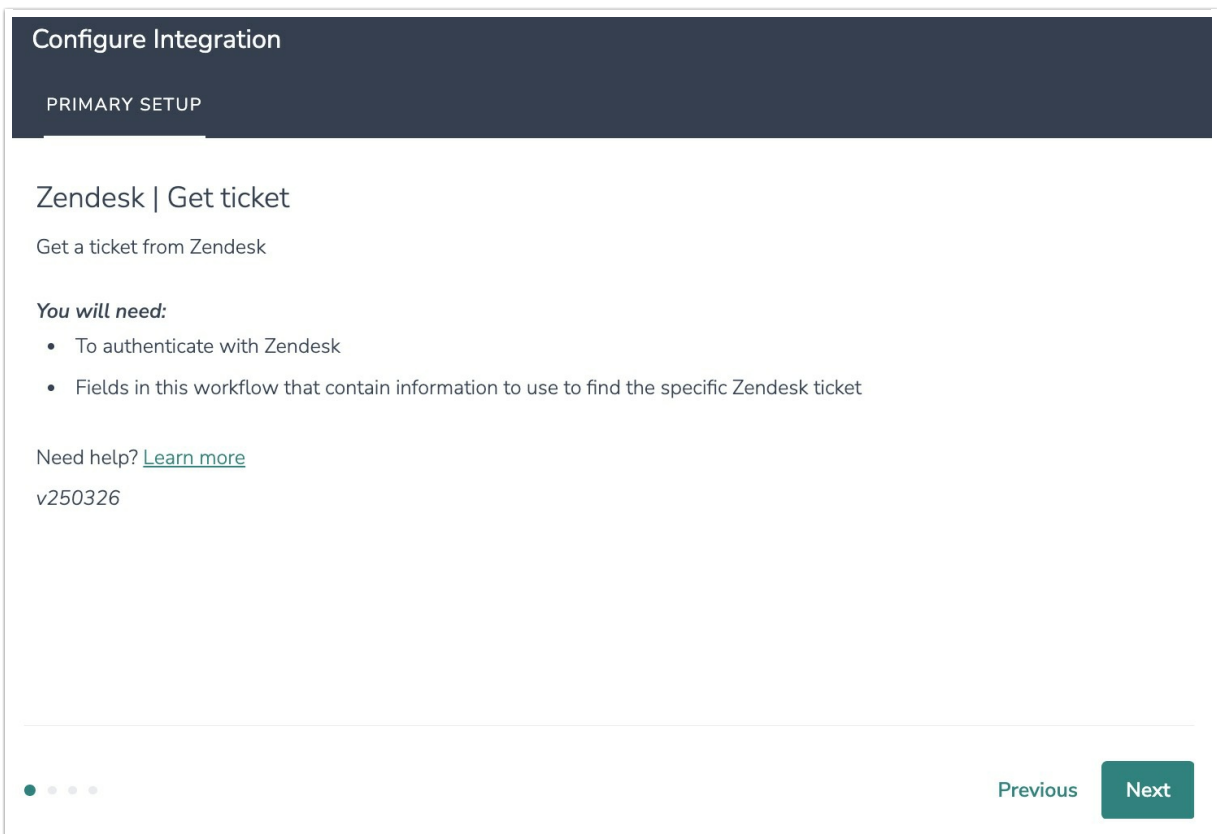
Cancel   Next

Zendesk | Get Zendesk Ticket

Before configuring this Zendesk Integration action you will need:
- Your Zendesk login
- Your Zendesk instance subdomain
- Fields in the workflow that will contain the data used to look up the Zendesk ticket record

1. Select "Get Zendesk Ticket".

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Select Action

Select the action you would like to perform.

Update ticket
Update a user in Zendesk

Update user
Update a user in Zendesk

Get ticket
Get a ticket from Zendesk

Get user
Get a user from Zendesk

Cancel   Next

2. Hit "Next" on the overview screen.

Zendesk | Get ticket

Get a ticket from Zendesk

You will need:

- To authenticate with Zendesk
- Fields in this workflow that contain information to use to find the specific Zendesk ticket

Need help? Learn more

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3. Connect your Zendesk account.

4. Select the field in the workflow you want to use to find the specific ticket record in Zendesk.
Ticket ID will often make the most sense, but you can use any of the other fields listed in the drop-down list.

5. When complete, click "Save" to finalize the Integration.

Now what / Where is my data?

All of the information from this integration is now available in this workflow and all surveys in this workflow. You can use them to:
- Add Merge Codes to Email or Survey Invite steps.
- Use with Logic in the workflow.
- Use to personalize the survey in the workflow.

Zendesk | Get Zendesk User Record

Before configuring this Zendesk Integration action you will need:
- Your Zendesk login
- Your Zendesk instance subdomain
- Fields in this workflow that will contain the data used to look up the Zendesk user record

1. Select "Get User".

Configure Integration

PRIMARY SETUP

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Select Action

Select the action you would like to perform.

| **Update ticket** | **Update user** | **Get ticket** |
| Update a user in Zendesk | Update a user in Zendesk | Get a ticket from Zendesk |

Get user
Get a user from Zendesk

Cancel   Next

2. Hit "Next" on the overview screen.

Configure Integration

PRIMARY SETUP

Zendesk | Get user

Get a user from Zendesk

You will need:
- To authenticate with Zendesk
- Fields in this workflow that contain information to use to find the specific Zendesk user

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3. Connect your Zendesk account.

Edit Action

PRIMARY SETUP   LOGIC

Zendesk | Authentication

Connect to your Zendesk account.

Zendesk Instance Subdomain*

<empty string>

Zendesk Instance Subdomain is required

Zendesk Authentication

Zendesk connected
Kevin's Zendesk trial account alchemer5616

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4. Select the field in the workflow that you want to use to find the user record in Zendesk

Configure Integration

PRIMARY SETUP

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.

At least one field is required. Multiple fields will be searched with AND logic.

Use this Alchemer field | to match this Zendesk field

Step 0 | Survey Listener Questions - [Zendesk] Workflow Initiator Survey | ... | Zendesk | id

Add a new mapping

5. When complete, click "Save" to finalize the Integration.

Now what / Where is my data?

All of the information from this integration is now available in this workflow and all surveys in this workflow. You can use them to:
- Add Merge Codes to Email or Survey Invite steps.
- Use with Logic in the workflow.
- Use to personalize the survey in the workflow.

Zendesk | Update Zendesk User

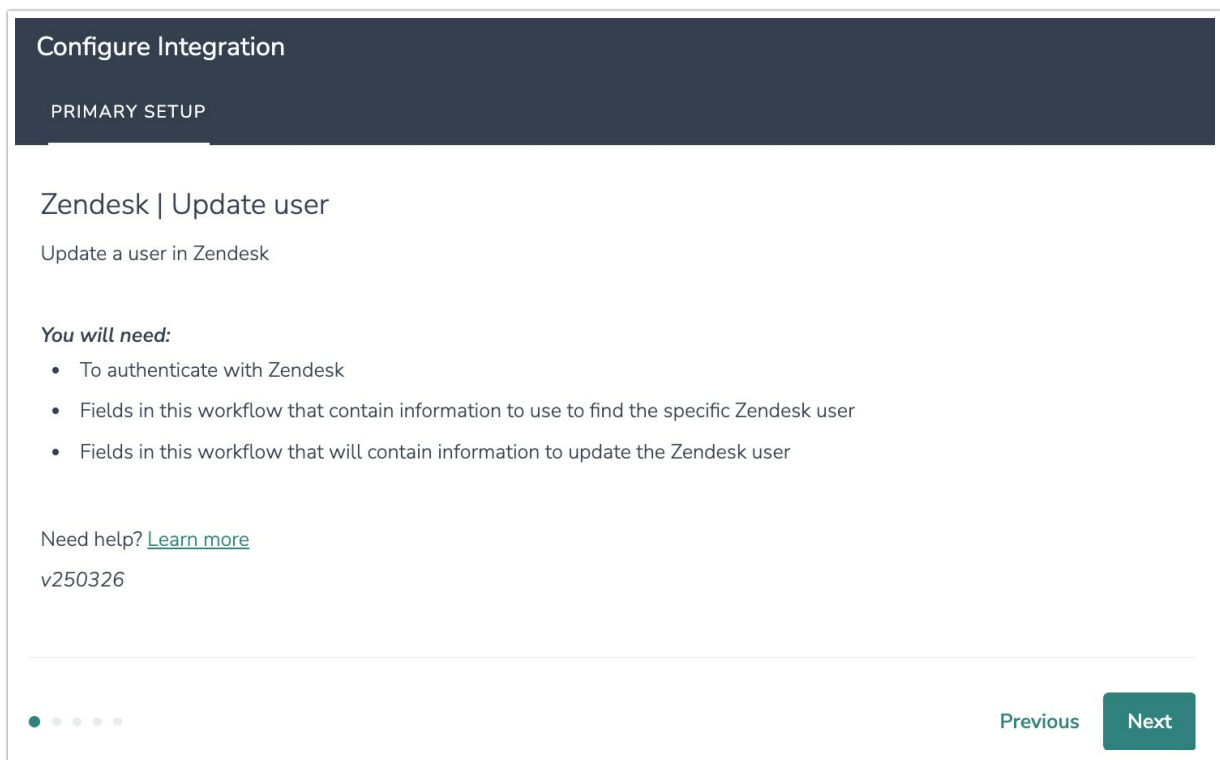Before configuring this Zendesk Integration action you will need:
- Your Zendesk login
- Your Zendesk instance subdomain
- Fields in this workflow that contain information to use to find the specific Zendesk user
- Fields in this workflow that will contain information to update the Zendesk user

1. Select "Update User".
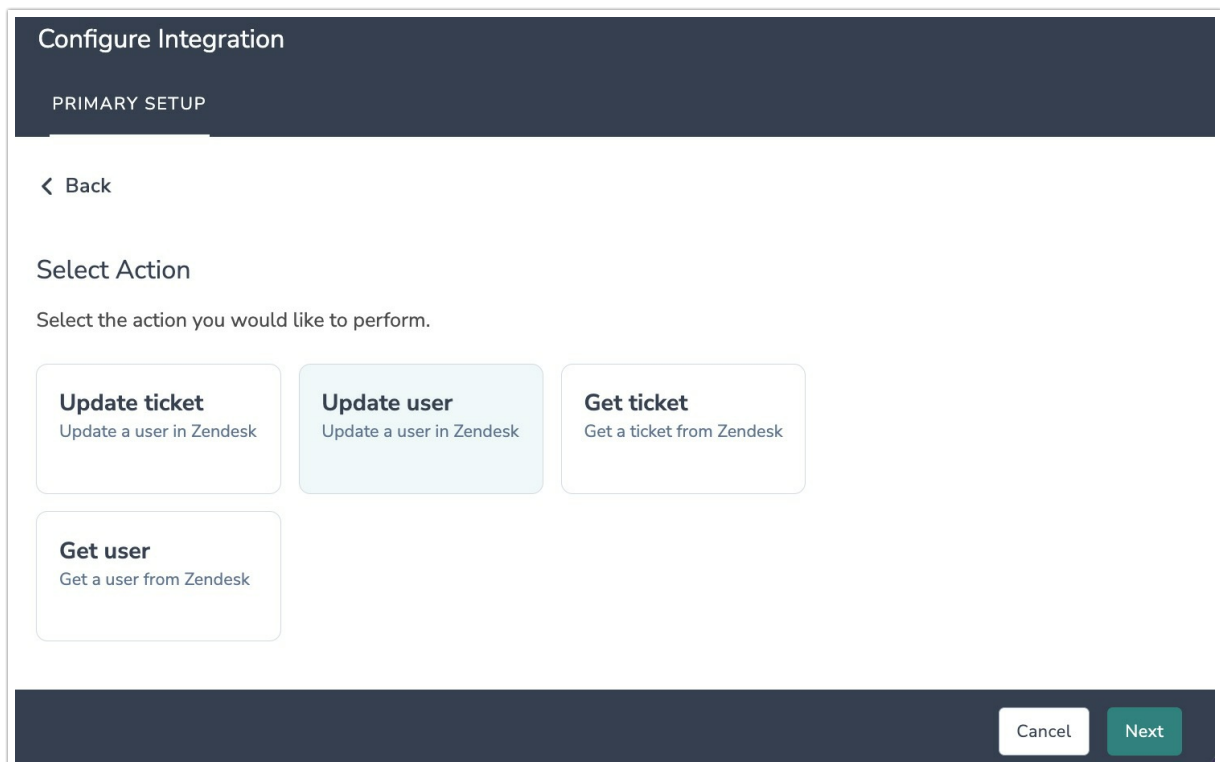
2. Click "Next" on the overview screen.

3. Connect your Zendesk account.

4. Select the fields in this workflow that contain the values you want to use to find the specific user record in Zendesk.

5. Map fields in Alchemer to corresponding fields in Zendesk. This will push the data from that field into Zendesk and update the corresponding field for the identified user.

6. When complete, click "Save" to finalize the Integration.

Zendesk | Update Zendesk Ticket

You will need:
- To authenticate with Zendesk
- Fields in this workflow that contain information to use to find the specific Zendesk ticket
- Fields in this workflow that will contain information to update the Zendesk ticket

1. Select "Update Ticket"

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

Configure Integration

PRIMARY SETUP

Zendesk | Update ticket

Update a ticket in Zendesk

You will need:
- To authenticate with Zendesk
- Fields in this workflow that contain information to use to find the specific Zendesk ticket
- Fields in this workflow that will contain information to update the Zendesk ticket

Need help? Learn more

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3. Connect your Zendesk account.

4. Select the fields in this workflow that contain the values you want to use to find the specific ticket record in Zendesk.

5. Map fields in Alchemer to corresponding fields in Zendesk. This will push the data from that workflow field into Zendesk and update the corresponding field for the identified ticket.

Configure Integration

PRIMARY SETUP

Zendesk | Update ticket with workflow data

Fields in this workflow that you would like to use to update the Zendesk ticket field

Use this Alchemer field	to update this Zendesk field	
Step 0	Survey Listener Questions - [Zendesk] Workflow Initiator Survey	... ∨	Zendesk	comment ∨	🗑

Add a new mapping

6. When complete, click "Save" to finalize the Integration.

FAQs

▷   **What permissions do I need within Alchemer to set-up and use the Zendesk integration?**

▷   **This integration doesn't fit my use cases, or I want to provide feedback to Alchemer!**

Related Articles