Salesforce Integration for Alchemer Workflow

> The Alchemer Salesforce Integration is available as an add-on. If you are interested in purchasing the Salesforce Integration, please contact us for additional information.
>
> If you have purchased the Salesforce Integration and are not seeing it in your account, don't hesitate to reach out.

Overview: Integrating Salesforce with Alchemer Workflow

The Salesforce integration for Alchemer Workflow gives you powerful tools to create, update, and get Salesforce records directly within your automated survey flows. This lets you seamlessly connect survey data with your Salesforce instance, ensuring your CRM stays accurate and up to date, without manual data entry.

With this integration, you can:

- **Create records** in any Salesforce object using data collected from Alchemer surveys.

- **Update existing Salesforce records** by mapping workflow data to specific object fields.

- **Get record data** from a Salesforce object to personalize surveys or trigger logic based on existing customer information.

These integrations are designed to help you automate and scale customer engagement, data hygiene, and personalization workflows, all from within Alchemer.

Adding a Salesforce 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 Salesforce step to your Workflow, drag the Salesforce step from the Step Library under Connections.
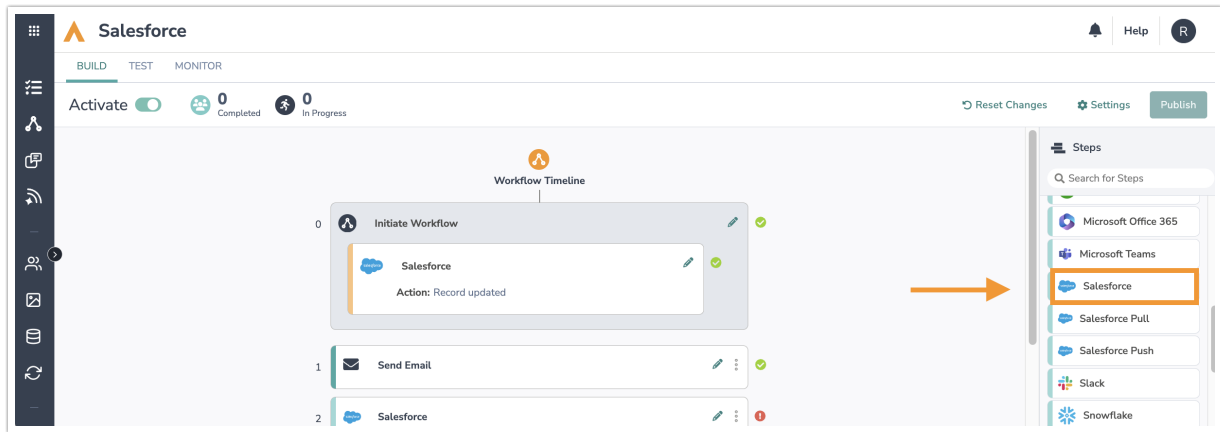
3. Click the pencil icon to configure your Excel integration step.

4. Select the action you would like to perform:

- Excel: Create record. Jump to section.
- Excel: Update record. Jump to section.
- Excel: Get record. Jump to section.

Excel | Create data in a record

> *You will need:*
> - To authenticate with Salesforce
> - Fields in this workflow used to create the record information

1. Select "Create record" as your action.

Configure Integration

PRIMARY SETUP

‹ Back

Select Action

Select the action you would like to perform.

Get record
Get a record from Salesforce

Create record
Create a record in Salesforce

Update record
Update a record in Salesforce

Cancel   Next

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

Configure Integration

PRIMARY SETUP

Salesforce | Create record

Create a record in Salesforce of any type

You will need:

• To authenticate with Salesforce
• Fields in this workflow used to create the record information

Need help? Learn more
v250707

Previous   Next

3. Authenticate with your Salesforce account. Click add a new account. Name your new authentication and click "create".

Salesforce | Authentication

Authenticate

Create a new authentication   ✕

Salesfo
Test

Your authentication name

PRODUCTIONUS:C719797:T1036009's Salesforce account 1

Salesforce instance type   ?

Production   ⌄

Previous   **Create**

Previous   **Next**

4. Enter your Salesforce My Domain.

Salesforce | My Domain

Enter your Salesforce My Domain

Salesforce My Domain*

yourcompanyname.my.salesforce.com

*Your Salesforce My Domain is a custom, branded subdomain for your Salesforce org e.g. (https:// **yourcompanyname** .my.salesforce.com)*

Previous   **Next**

5. Select the Salesforce object type.

Edit Integration

PRIMARY SETUP

Salesforce | Select object

Select the Salesforce object type

Select object*

Contact

Previous   Next

6. Select the fields in this survey that contain the values you want to use to create the specific record in Salesforce.

Edit Integration

PRIMARY SETUP

Salesforce | Create record

Select the fields in this survey that contain the values you want to use to create the specific record in Salesforce

Use this Alchemer field   **to match this Salesforce field**

Step 0 | Email   Salesforce | FirstName

Add a new mapping

Data prep options*

Strip HTML tags from inputs

Previous   Next

7. Click save. Set up is complete.

Edit Integration

PRIMARY SETUP

Salesforce | Setup complete

A log of each run result can be found in the Monitor tab. Metadata about this action are also available as merge codes.

A status code is available in the action metadata:
200: Record was successfully updated.
202: Multiple records were found. Please update your query to select unique fields.
400: The external integration returned an error.

Previous   Save

Excel | Update record

You will need:
- To authenticate with Salesforce
- Fields in this workflow that contain information to use to find the Salesforce record
- Fields in this workflow used to update the record information

1. Select "Create record" as your action.

PRIMARY SETUP

‹ Back

Select Action

Select the action you would like to perform.

| Get record | Create record | Update record |
| Get a record from Salesforce | Create a record in Salesforce | Update a record in Salesforce |

Cancel   Next

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

Edit Integration

PRIMARY SETUP

Salesforce | Update record

Update a record from Salesforce of any type

You will need:
- To authenticate with Salesforce
- Fields in this workflow that contain information to use to find the Salesforce record
- Fields in this workflow used to update the record information

Need help? Learn more

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Previous   Next

3. Authenticate with your Salesforce account. Click add a new account. Name your new authentication and click "create".

Configure Integration

PRIMARY SETUP

Salesforce | Authentication

Authenticate v

Create a new authentication

✕

Your authentication name

PRODUCTIONUS:C719797:T1036009's Salesforce account 1

Salesforce instance type ❓

Production ⌄

Previous   **Create**

● ○ ○ ○ ○ ○   Previous   **Next**

4. Enter your Salesforce My Domain.

Edit Integration

PRIMARY SETUP

Salesforce | My Domain

Enter your Salesforce My Domain

Salesforce My Domain*

yourcompanyname.my.salesforce.com

*Your Salesforce My Domain is a custom, branded subdomain for your Salesforce org e.g. (https:// **yourcompanyname** .my.salesforce.com)*

○ ○ ● ○ ○ ○   Previous   **Next**

5. Select the Salesforce object type.

Edit Integration

PRIMARY SETUP

Salesforce | Select object

Select the Salesforce object type

Select object*

Contact ⌄

Previous   Next

6. Select the fields in this survey that contain the values you want to use to find the specific record in Salesforce.

Edit Integration

PRIMARY SETUP

Salesforce | Find record

Select the fields in this survey that contain the values you want to use to find the specific record in Salesforce

If you select more than one field they are combined with the AND operator

Use this Alchemer field | to match this Salesforce field

Step 0 | Survey Listener Questions - Salesforce Initiator | 1. Inp... ⌄ | Salesforce | Email ⌄ 🗑

Add a new mapping

Previous   Next

7. Select the fields in this workflow that contain the values you want to use to update the specific

record in Salesforce.

8. Click save. Set up is complete.

Excel | Get record

1. Select "Create record" as your action.

Configure Integration

PRIMARY SETUP

< Back

Select Action

Select the action you would like to perform.

Get record	Create record	Update record
Get a record from Salesforce	Create a record in Salesforce	Update a record in Salesforce

Cancel   Next

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

Edit Integration

PRIMARY SETUP

Salesforce | Get record

Get a record from Salesforce of any type

You will need:

- To authenticate with Salesforce
- Fields in this workflow that contain information to use to find the Salesforce record

Need help? Learn more

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Previous   Next

3. Authenticate with your Salesforce account. Click add a new account. Name your new authentication and click "create".

4. Enter your Salesforce My Domain.

5. Select the Salesforce object type.

6. Select the fields in this survey that contain the values you want to use to find the specific record in Salesforce.

Edit Integration

PRIMARY SETUP

Salesforce | Find record

Select the fields in this survey that contain the values you want to use to find the specific record in Salesforce

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Use this Alchemer field   **to match this Salesforce field**

| Step 0 | Survey Listener Questions - Salesforce Initiator | 1. Inp... ⌄ | | Salesforce | Email ⌄ | 🗑 |

Add a new mapping

Previous   **Next**

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7. Click save. Set up is complete.

Edit Integration

PRIMARY SETUP

Salesforce | Setup complete

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Previous   **Save**

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