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.

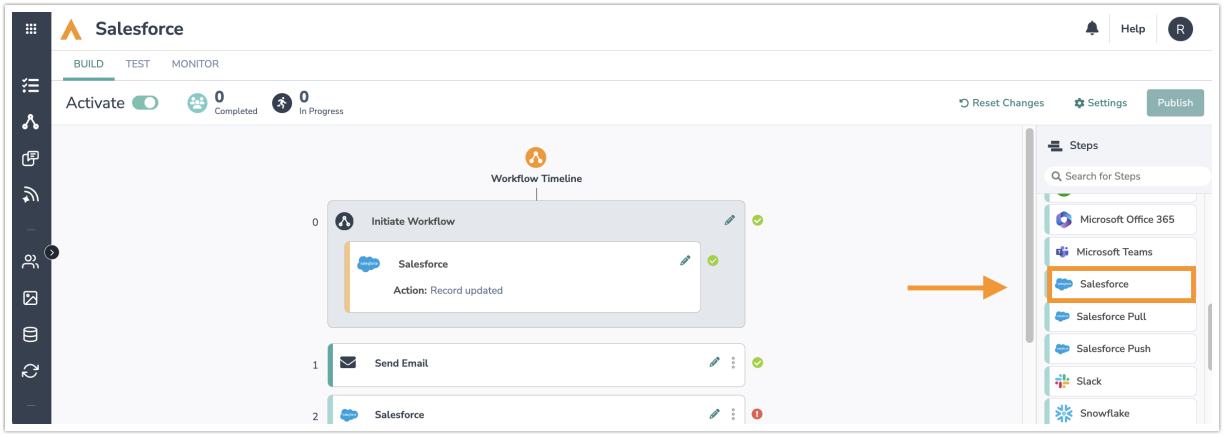
These integrations are designed to help you automate and scale customer engagement, data hygiene, and personalization workflows, all from within Alchemer.

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

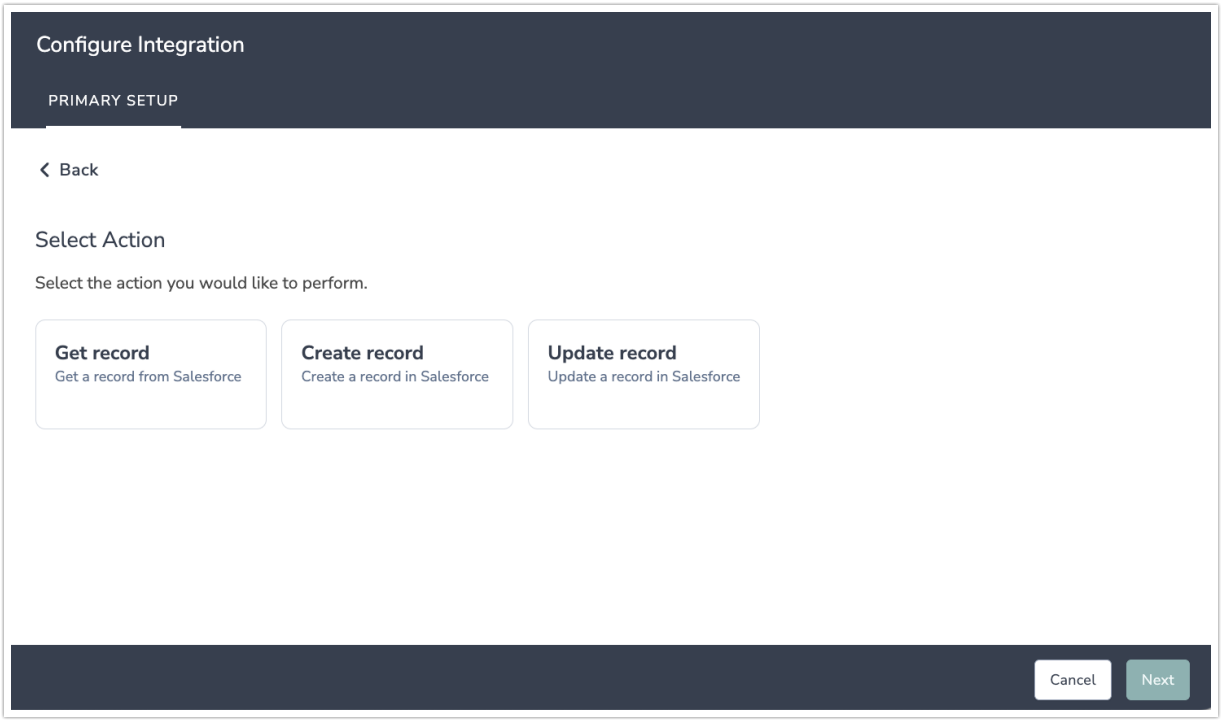
2. When you are ready to add the Salesforce step to your Workflow, drag the Salesforce step from the Step Library under Connections.



3. Click the pencil icon to configure your Salesforce integration step.

4. Select the action you would like to perform:

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

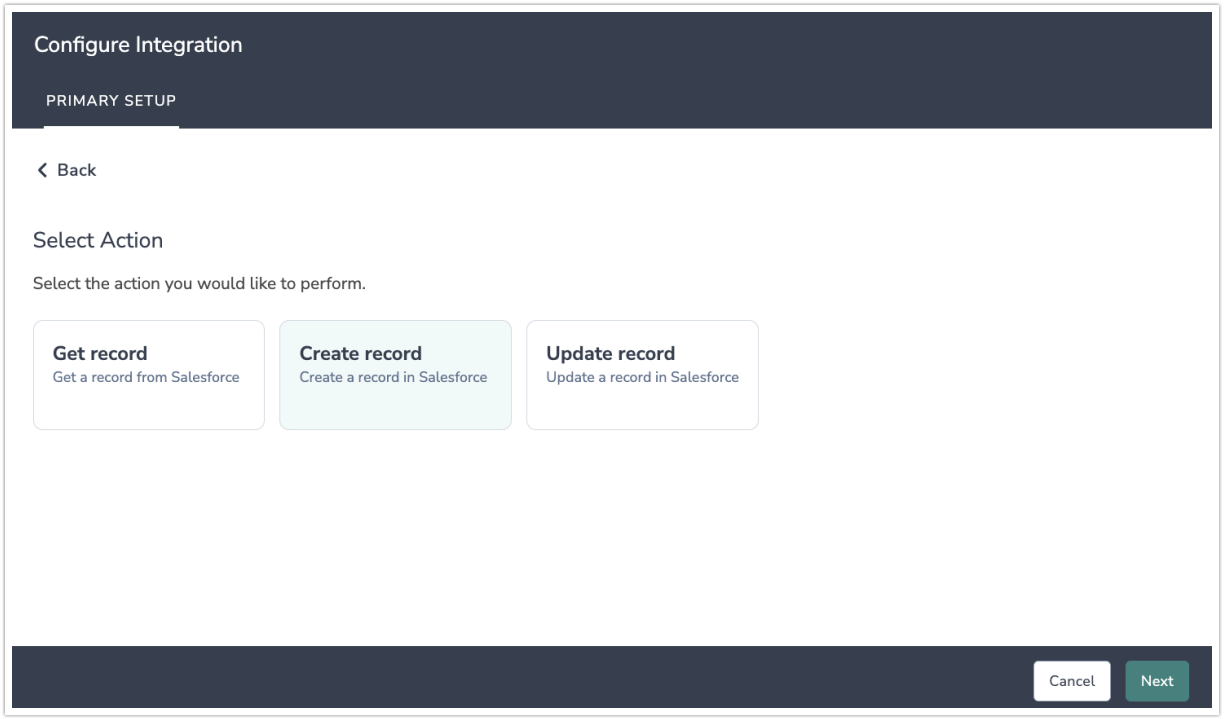


Salesforce | Create data in a record

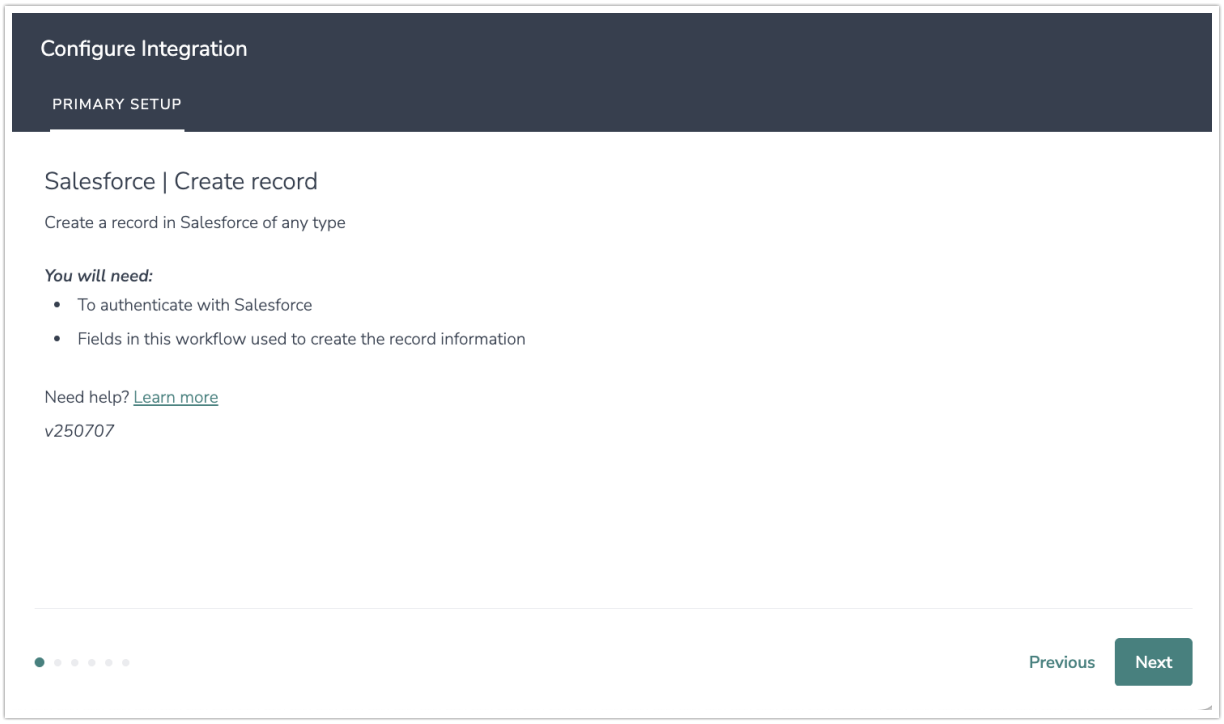
You will need:

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

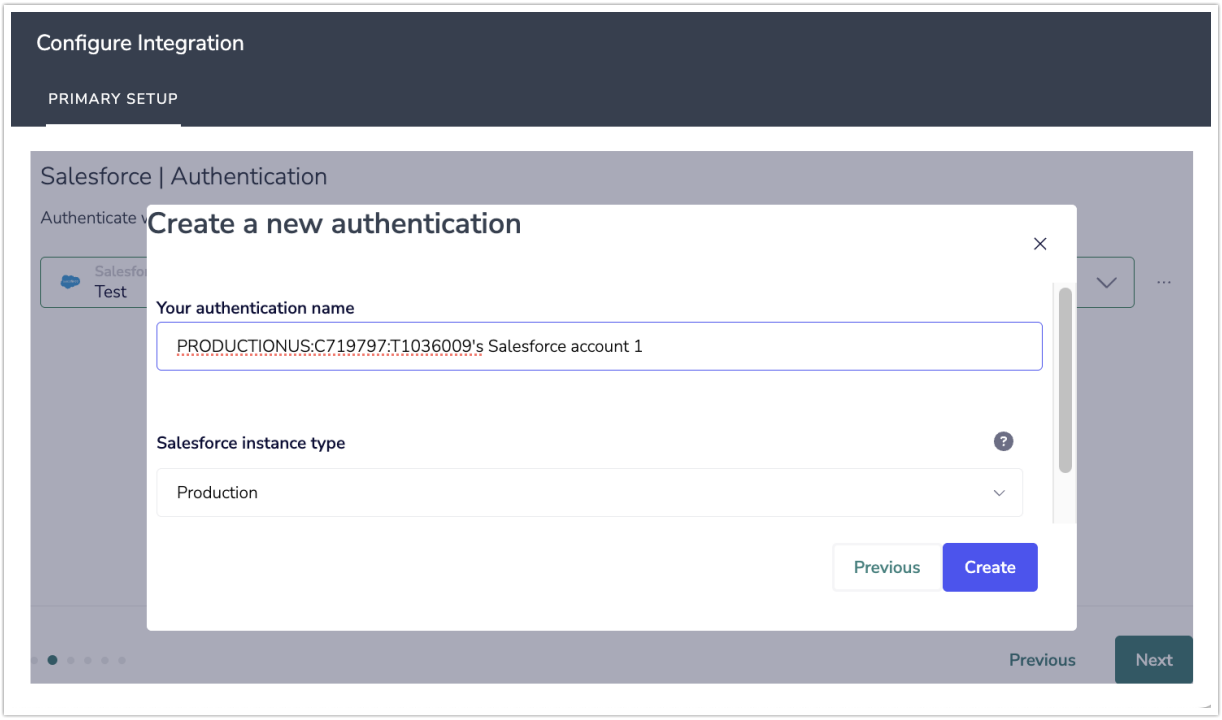
1. Select "Create record" as your action.



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

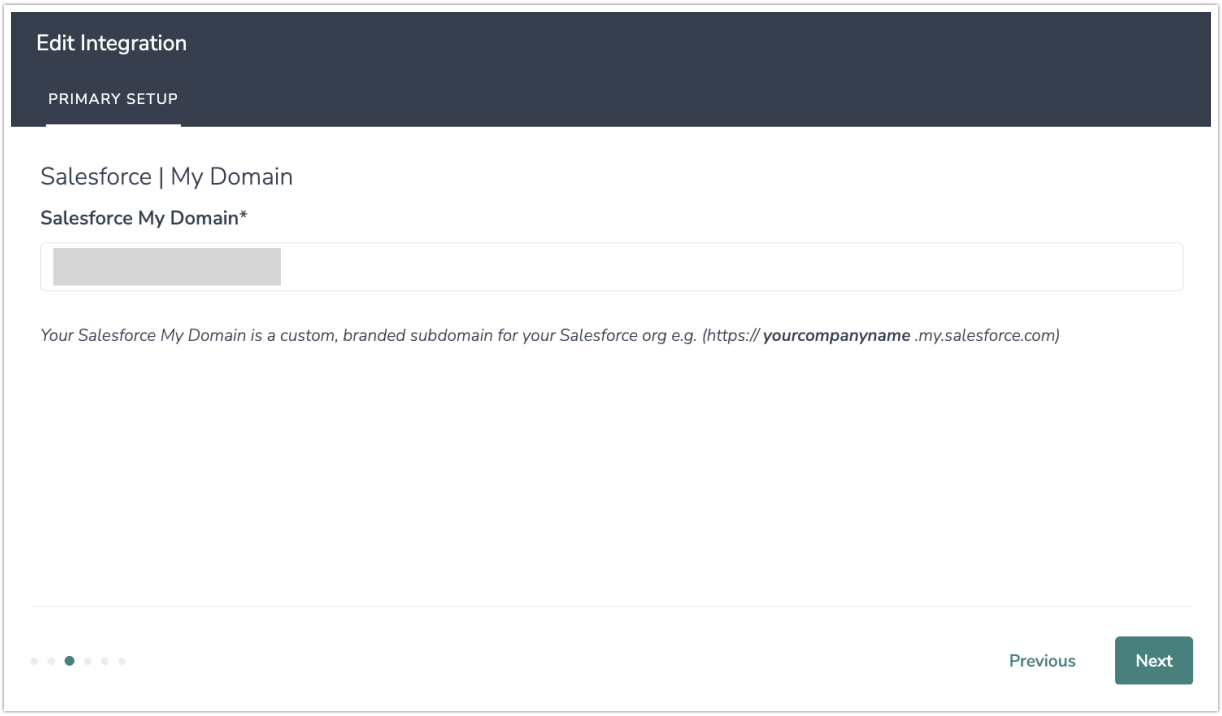


3. Authenticate with your Salesforce account. Click add a new account. Name your new authentication and click "create".

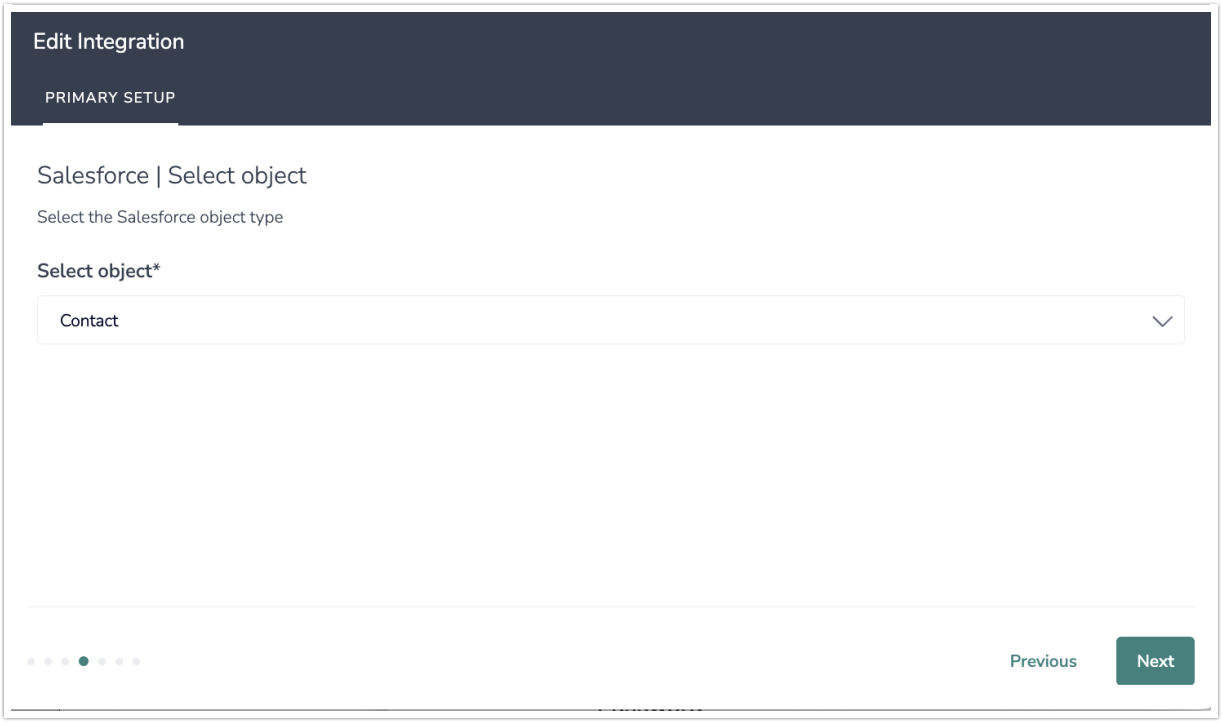


4. Enter your Salesforce My Domain.

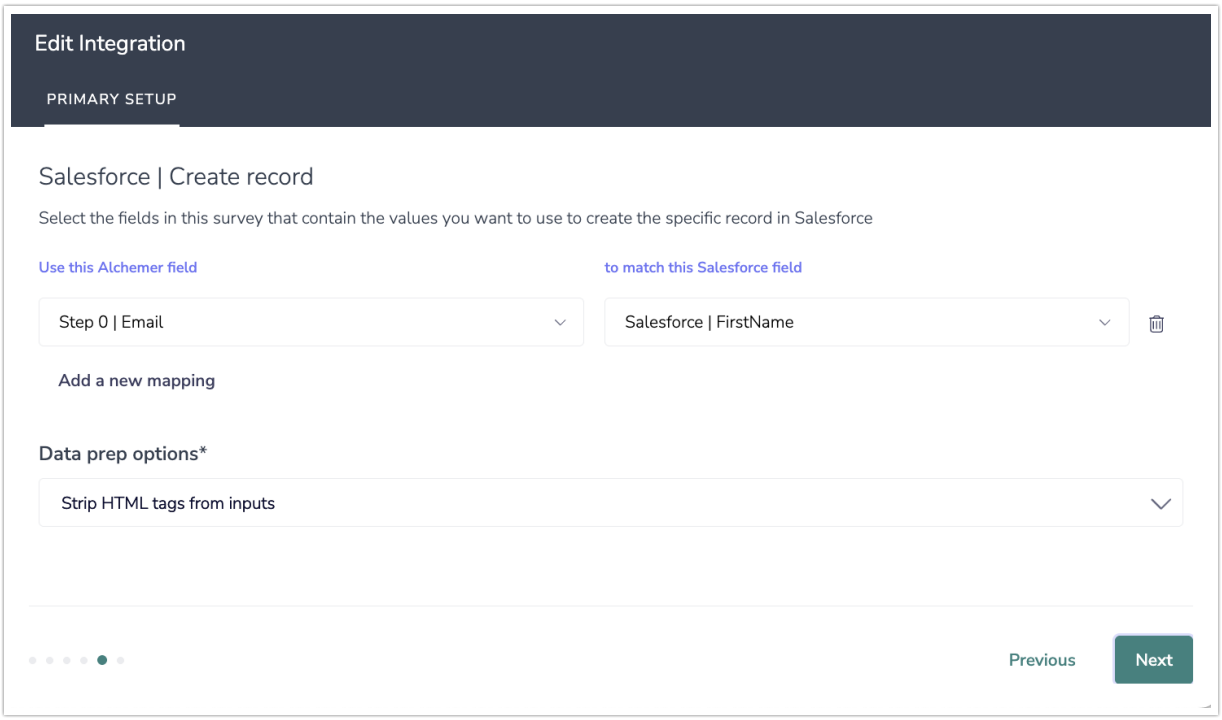
What is my domain?



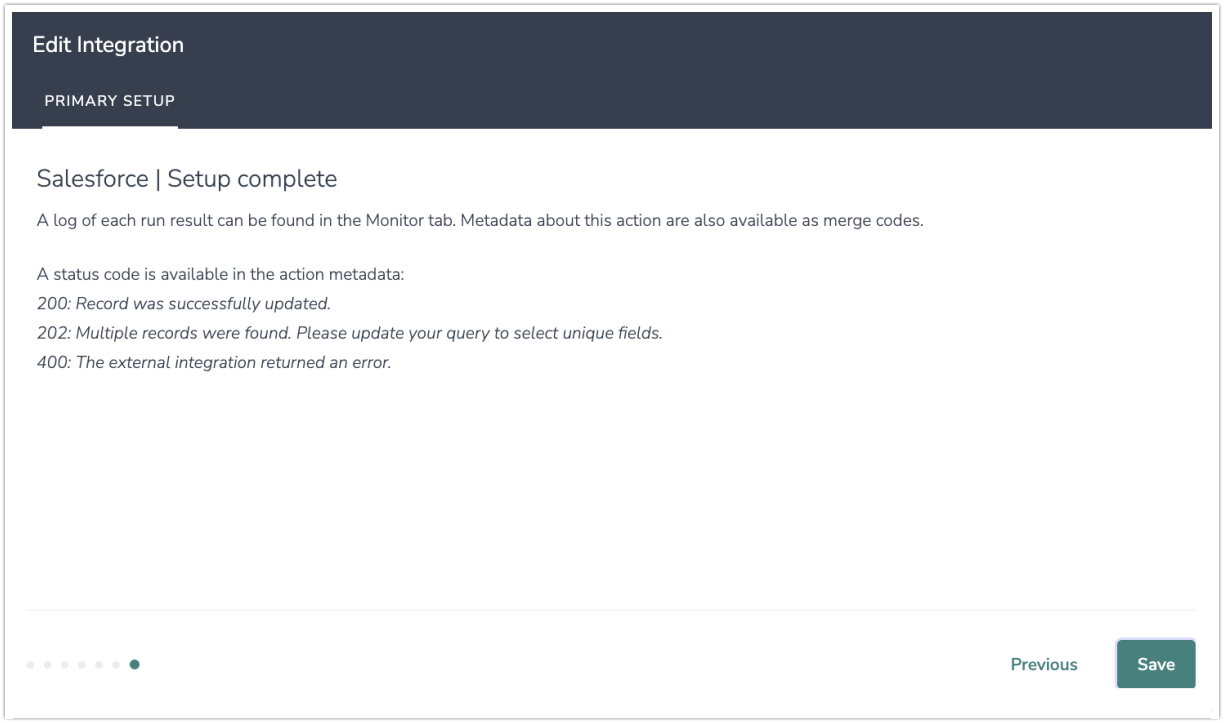
5. Select the Salesforce object type.



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



7. Click save. Set up is complete.

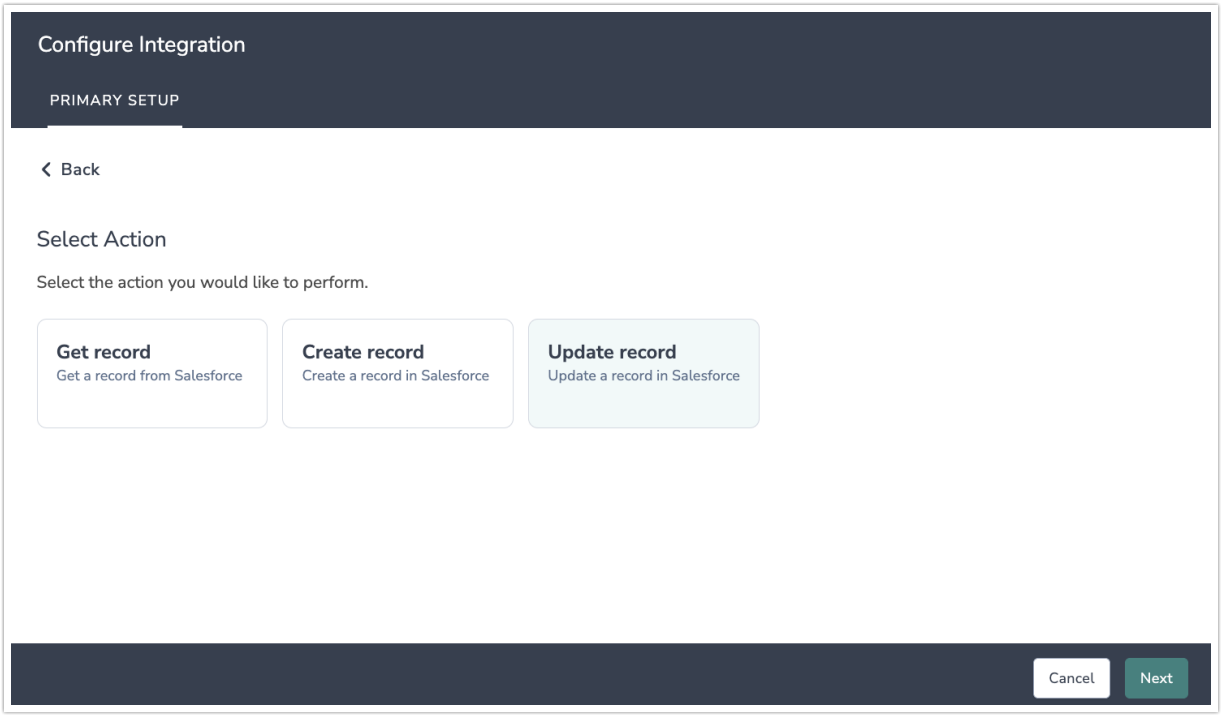


Salesforce | Update record

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.



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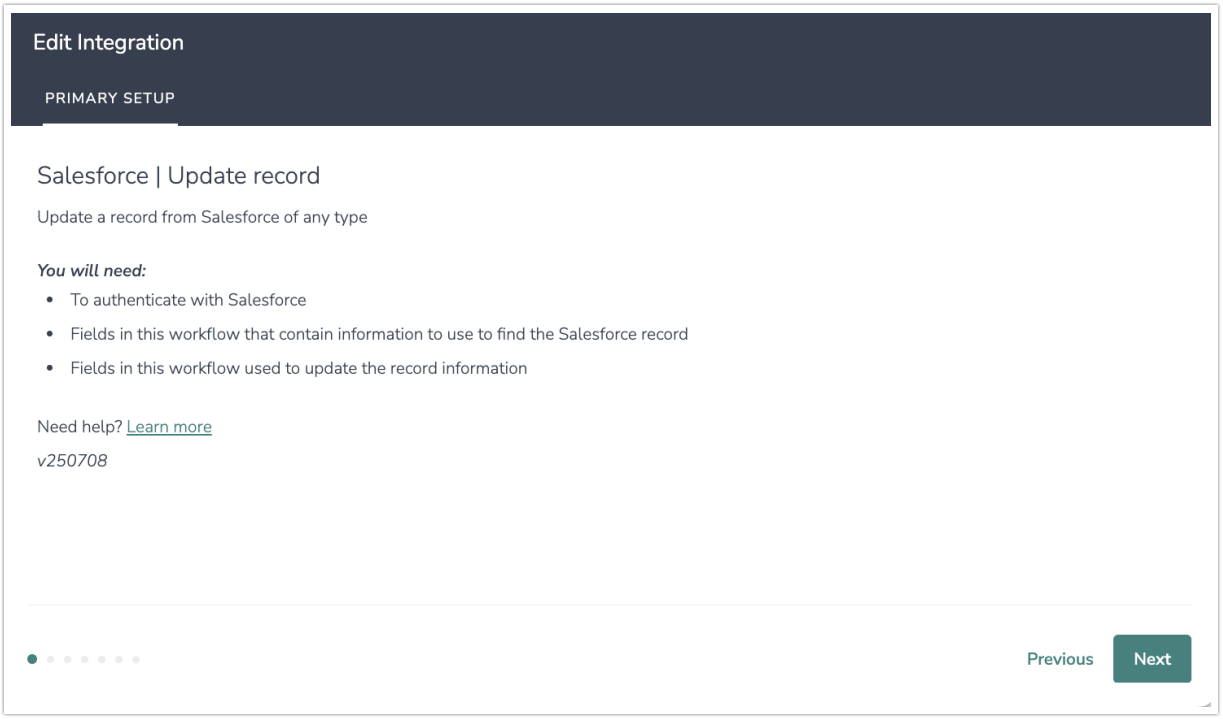

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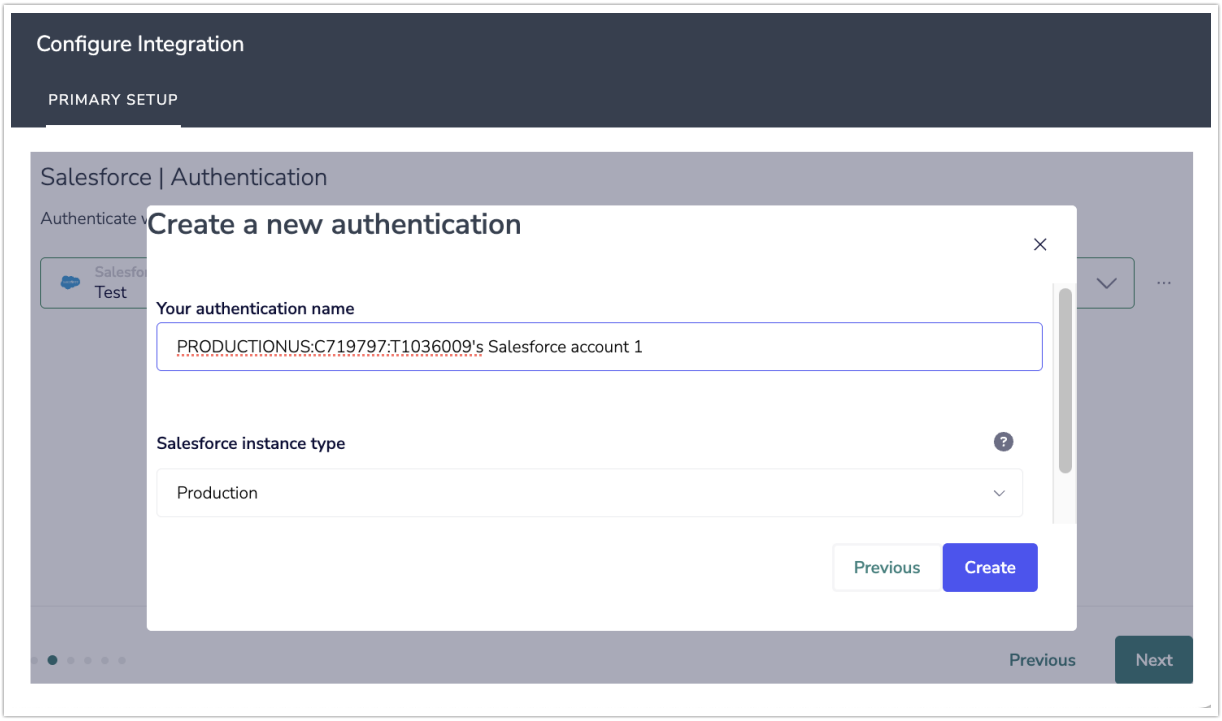

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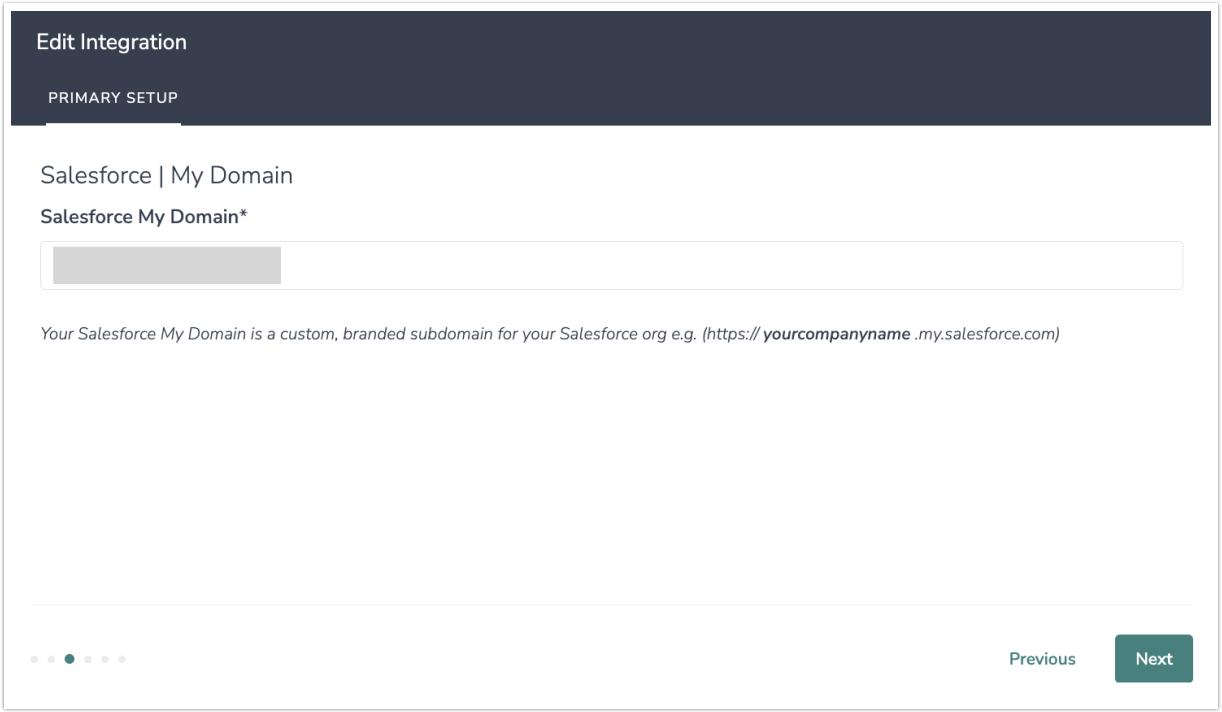
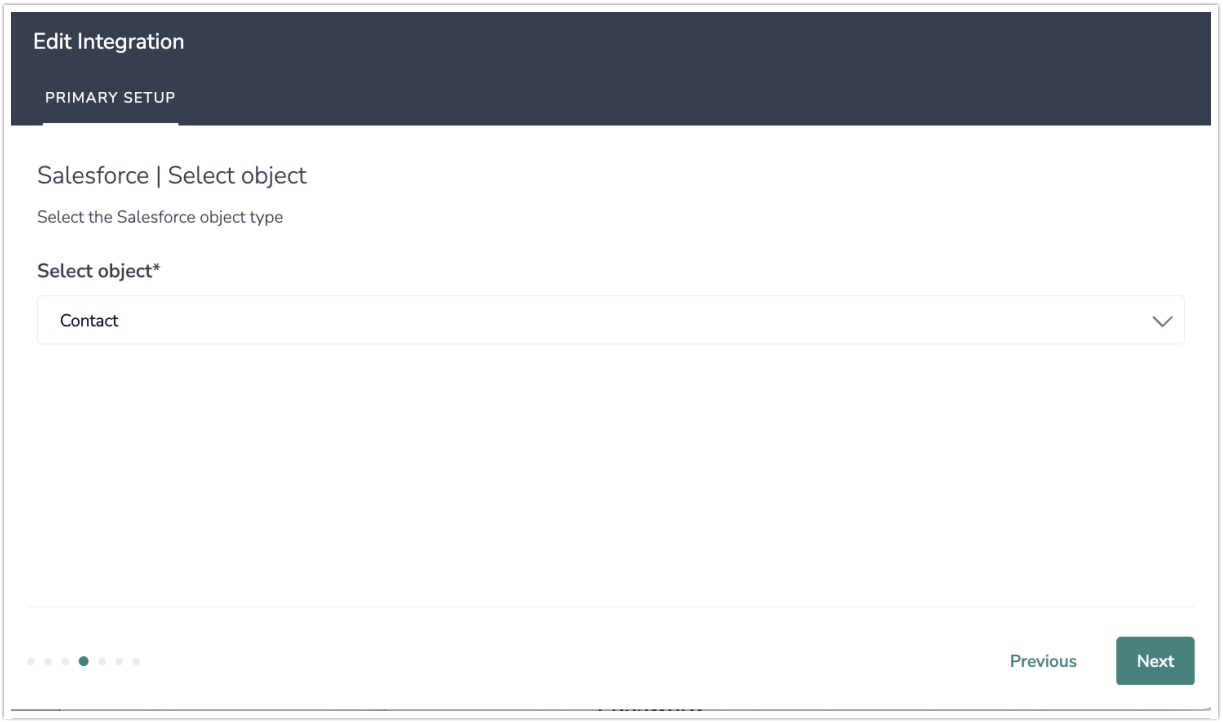
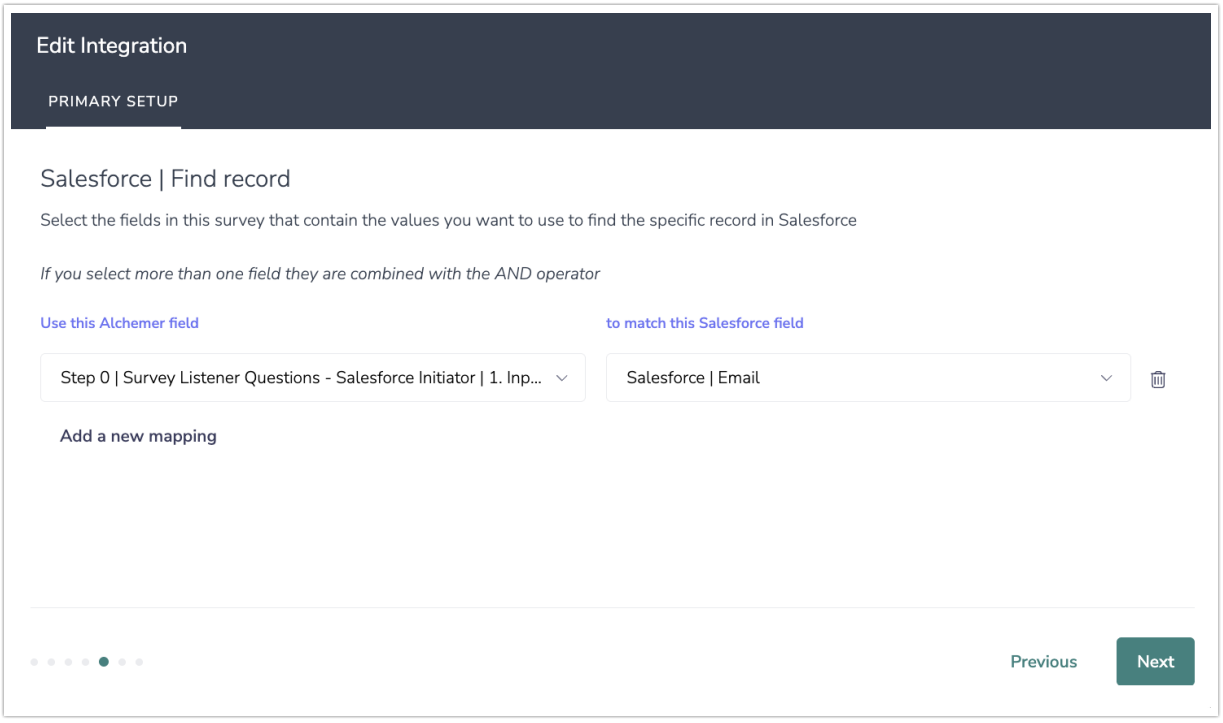


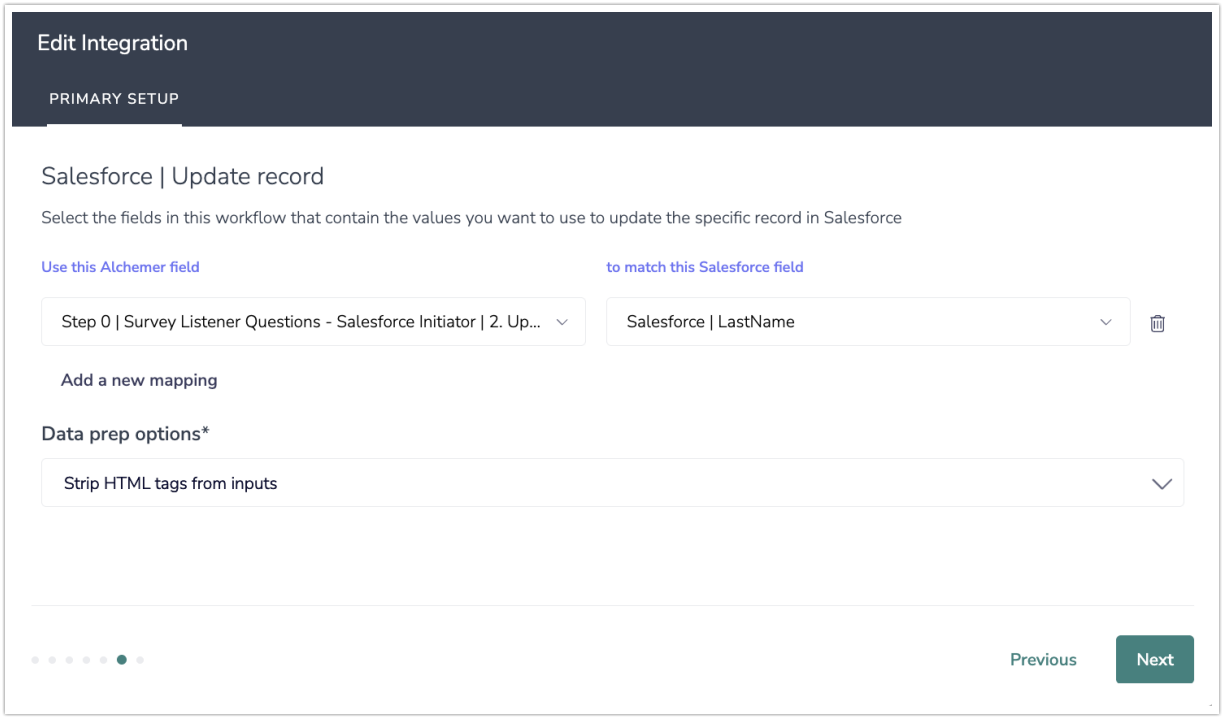
5. Select the Salesforce object type.



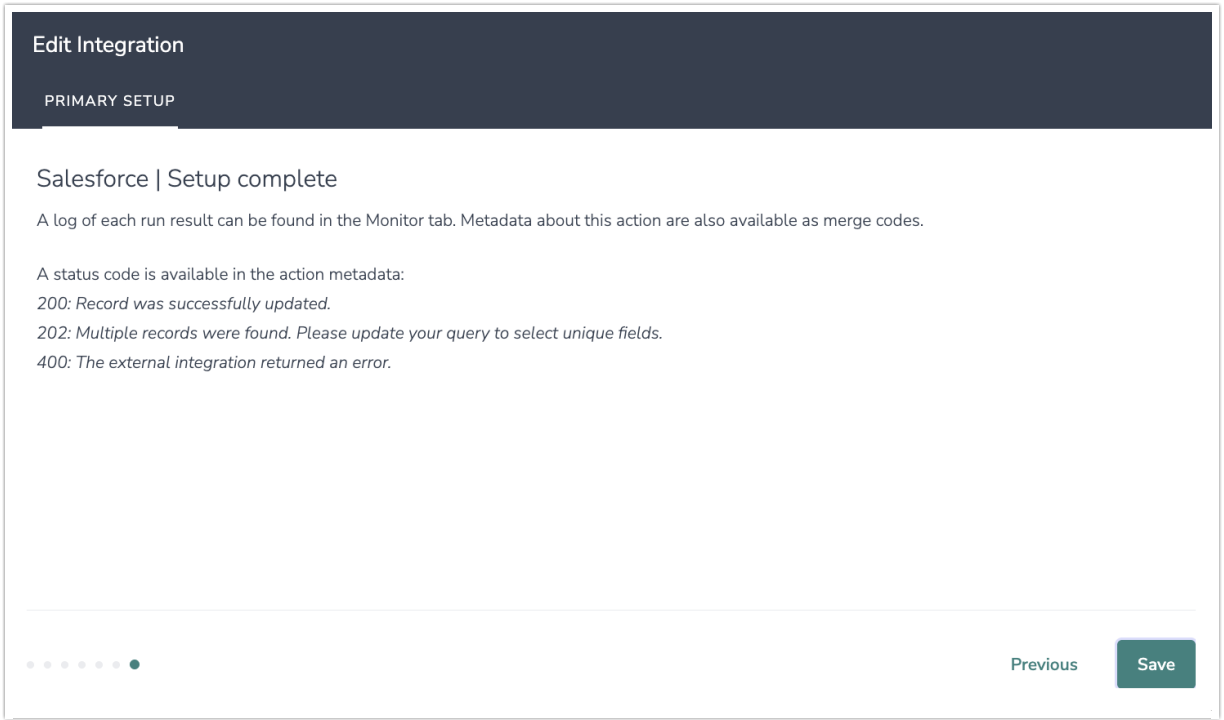
6. Select the fields in this survey that contain the values you want to use to find the specific record in Salesforce.



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.



Salesforce | Get record

You will need:

- To authenticate with Salesforce
- Fields in this workflow used to find the record information

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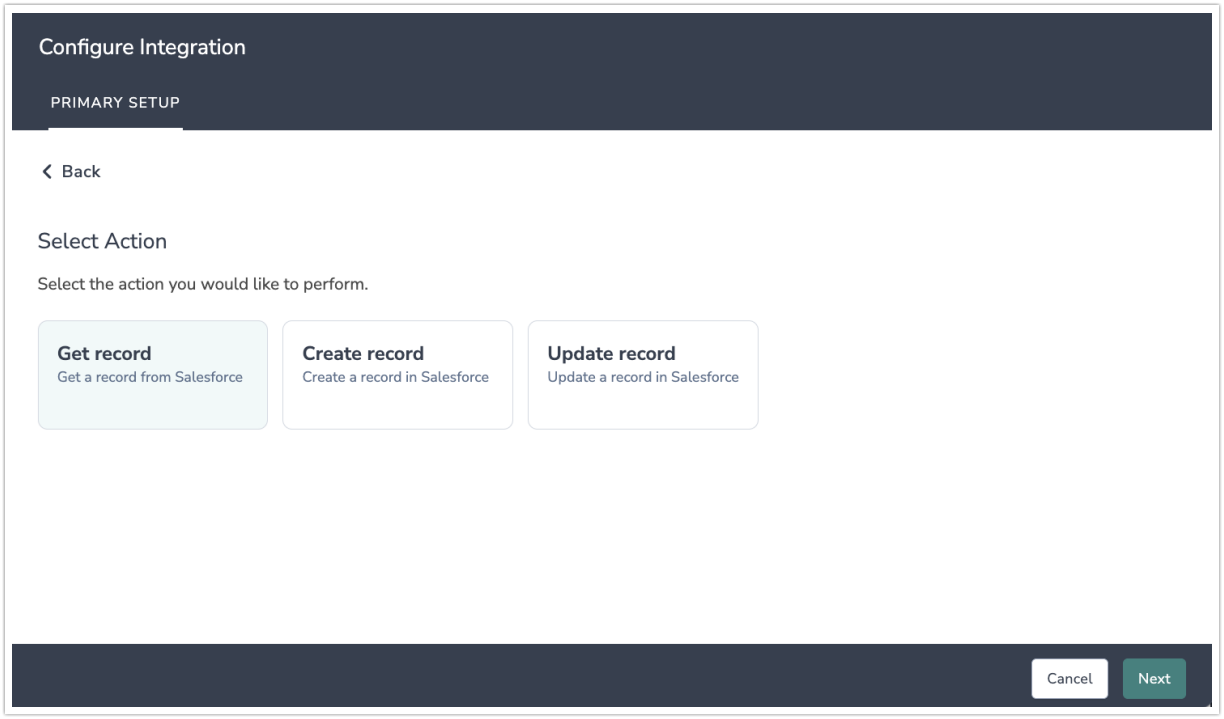

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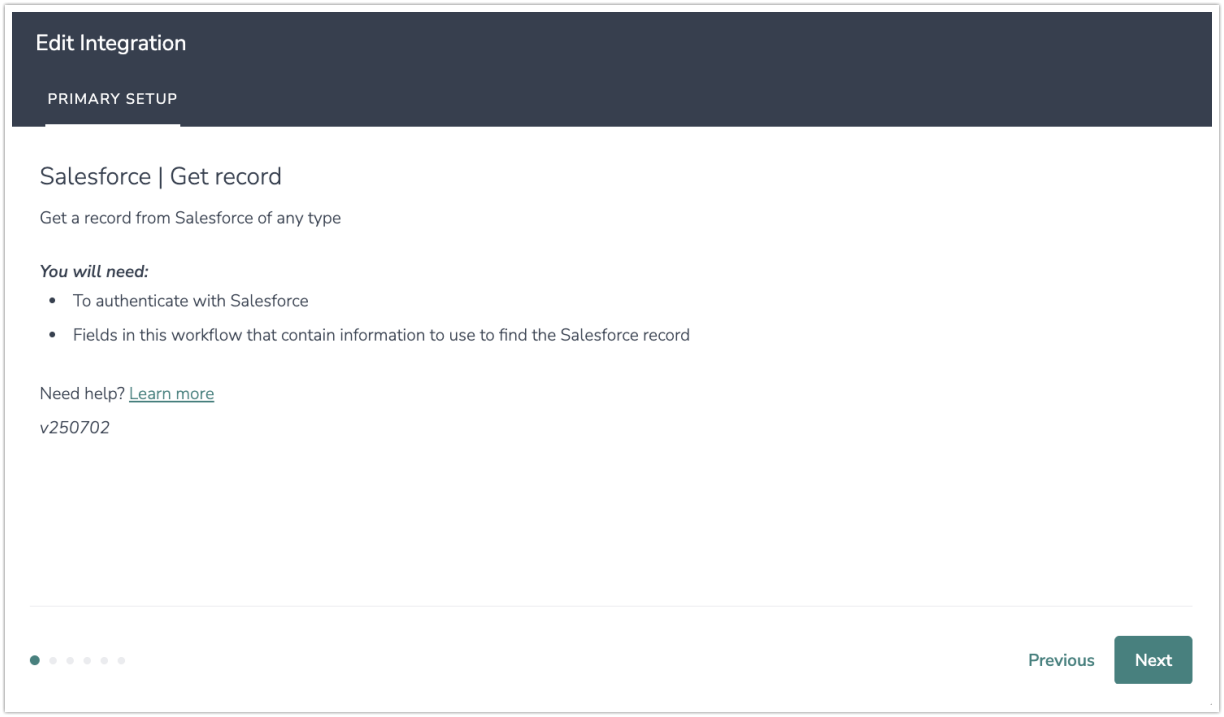

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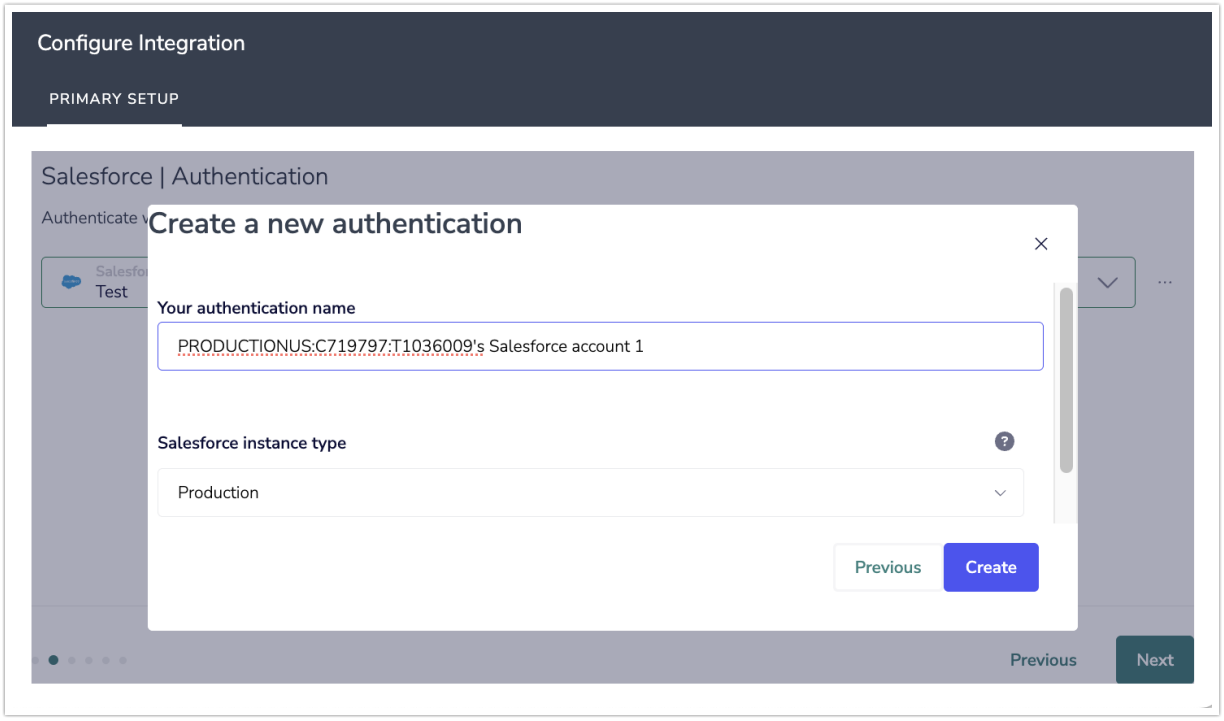

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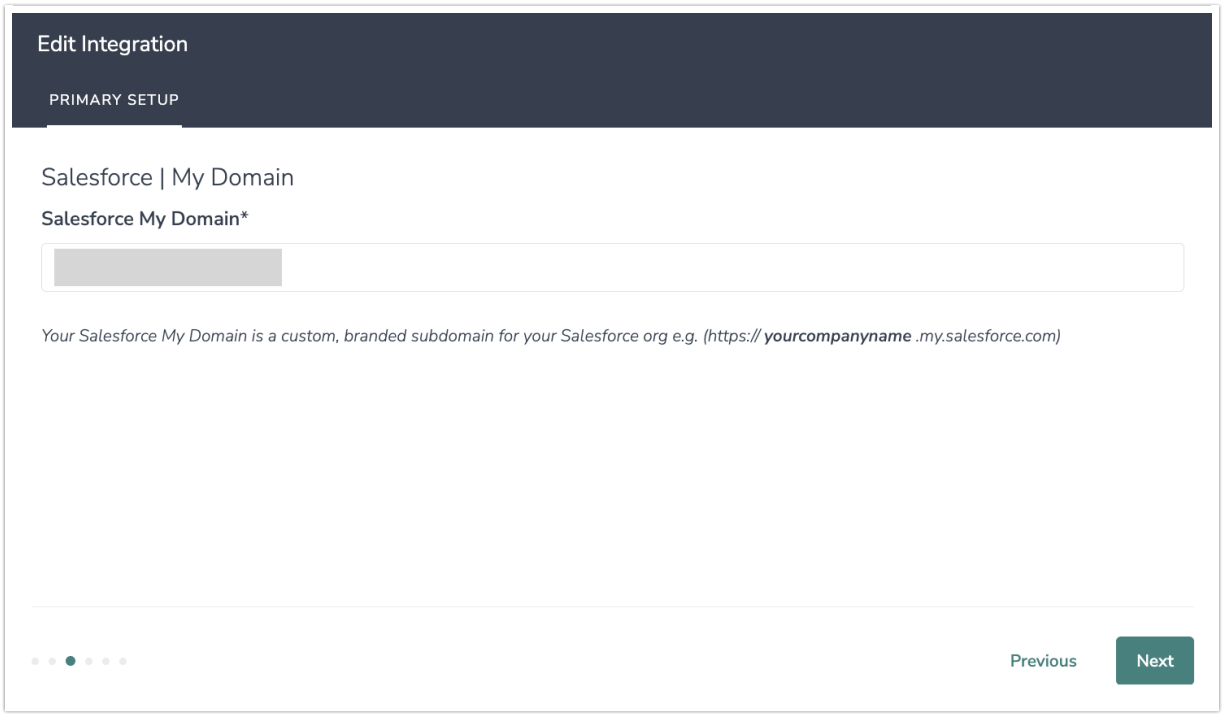
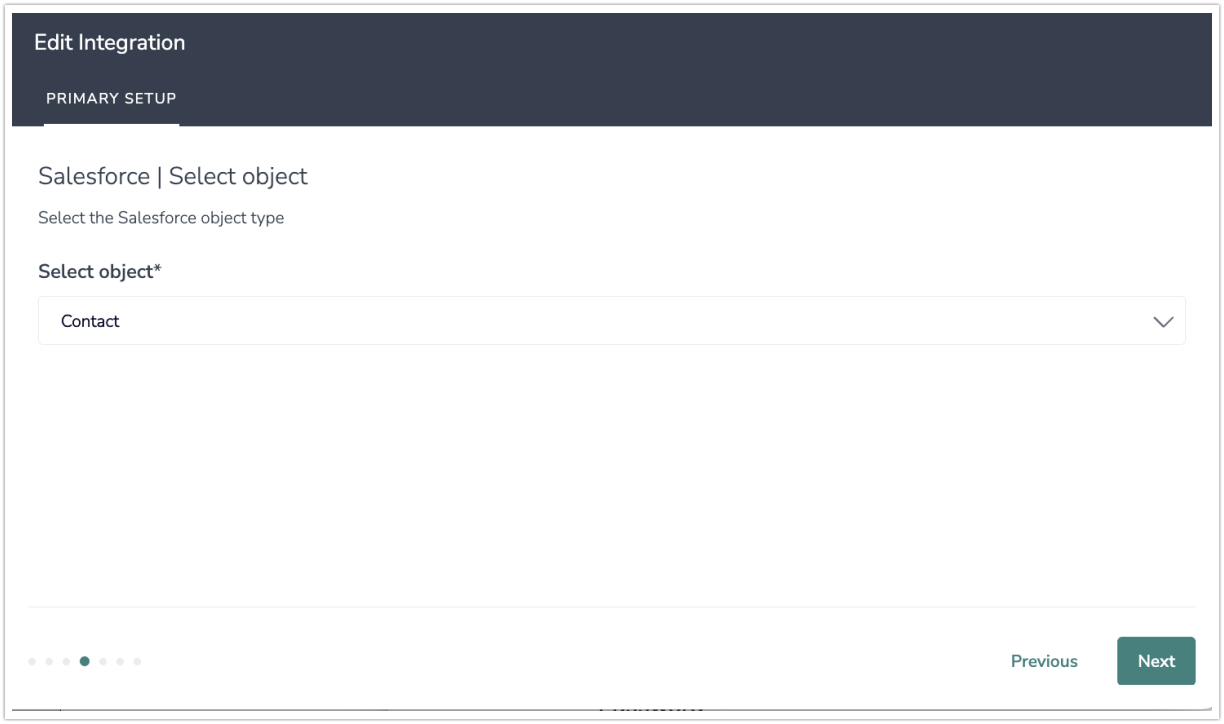


5. Select the Salesforce object type.



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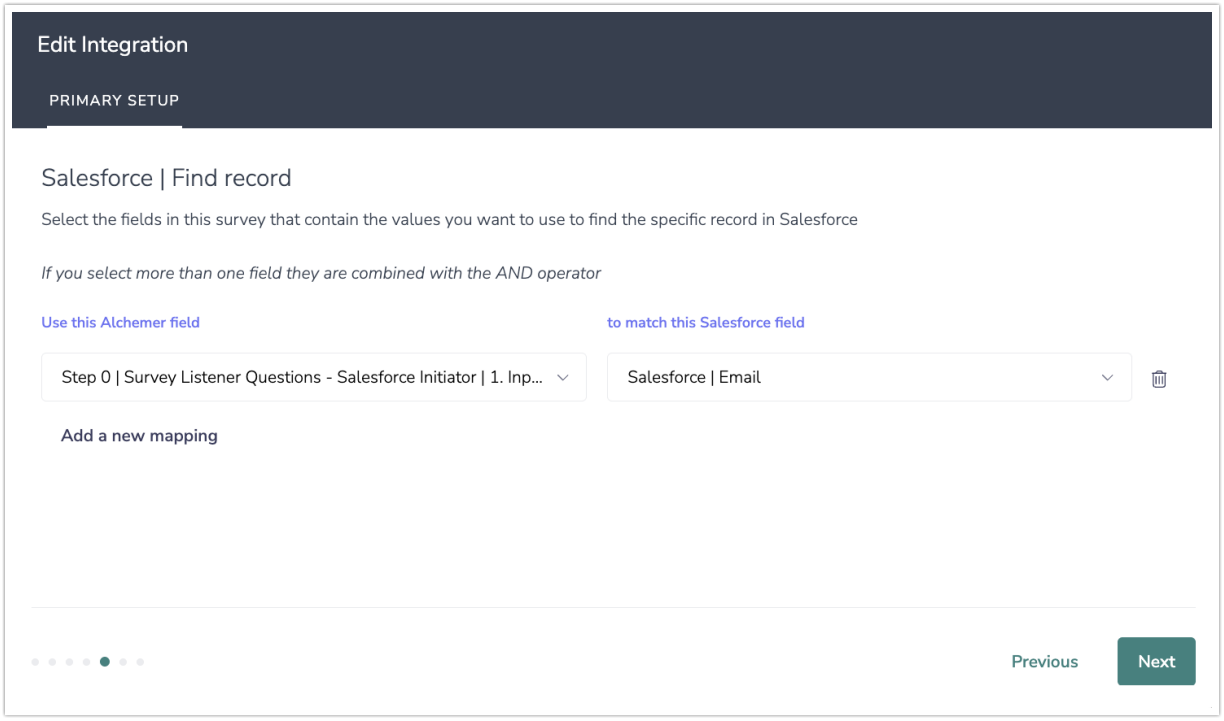

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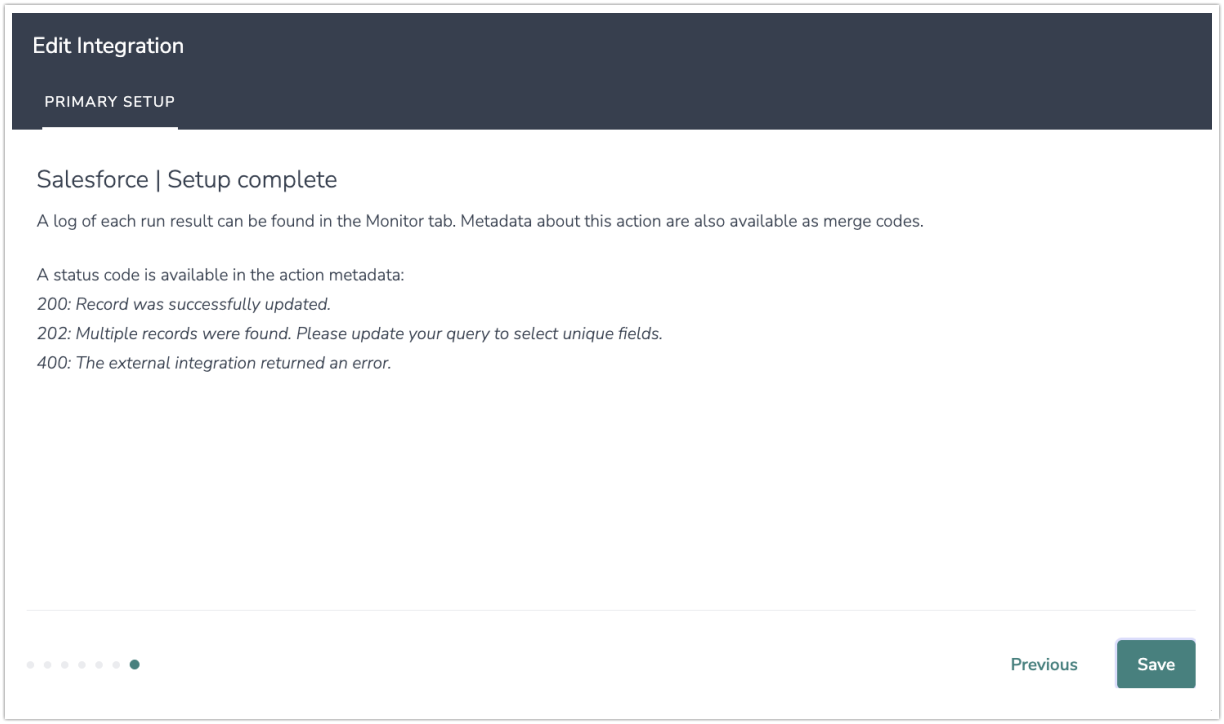

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