Salesforce Alchemer Workflow Initiator

Overview

Salesforce is a cloud-based customer relationship management (CRM) platform used by organizations to manage sales, service, marketing, and customer data.

The Alchemer integration with Salesforce supports automated workflow initiation based on Salesforce record activity. The Alchemer Salesforce Workflow Initiator allows Alchemer to listen for record and opportunity events in Salesforce and trigger a separate workflow execution for each event—fully automating downstream survey delivery, data processing, and integrations without manual intervention.

Common uses for the Alchemer Salesforce integration

- Automatically trigger a workflow when a Salesforce record is created or updated
- Send surveys to contacts when a Salesforce opportunity closes won or lost
- Trigger follow-up workflows when a Salesforce case is closed
- Drive workflow branching or routing using Salesforce record field values
- Initiate Alchemer workflows directly from a Salesforce Flow
- Reduce manual monitoring of Salesforce record changes

What can the Alchemer Salesforce integration do?

- Start workflow when a record is created or updated
- Start workflow when a record is created
- Start workflow when a record is updated
- Start workflow when an opportunity is closed won
- Start workflow when an opportunity is closed lost
- Start workflow when a case is closed
- Initiate from Salesforce Flow

You will need

- Salesforce OAuth authentication. More details in the authentication how-to guide.
- An Alchemer plan that includes integrations with Workflow and the Integration Manager permission enabled.
  - Contact us if you are unsure if your plan includes integrations.

Setup Alchemer Salesforce integration in Workflow

Salesforce | Record created or updated

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You will need:

- Salesforce OAuth authentication. More details in the authentication how-to guide.
- Access to the Salesforce object type you want to monitor

Configure the action

1. Open your workflow in **Workflow Builder**.
2. On the **Select Initiator** pop up, select the **Salesforce** initiator.
3. Select **Salesforce | Record created or updated**.
4. **Salesforce | Authentication:** Select an existing authentication or create a new authentication.
5. **Salesforce | Select record type:** Choose the Salesforce record type to monitor (e.g., Contact, Lead, Account).
6. **Salesforce | Select fields:** Choose which fields from the record you want available as merge codes in the workflow.
7. Save the action.

Status codes

- 200: Webhook received and workflow triggered successfully
- 400: The external integration returned an error

Salesforce | Record created

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You will need:

- Salesforce OAuth authentication. More details in the authentication how-to guide.
- Access to the Salesforce record type you want to monitor

Configure the action

1. Open your workflow in **Workflow Builder**.
2. On the **Select Initiator** pop up, select the **Salesforce** initiator.
3. Select **Salesforce | Record created**.
4. **Salesforce | Authentication:** Select an existing authentication or create a new authentication.
5. **Salesforce | Select record type:** Choose the Salesforce record type to monitor (e.g., Contact, Lead, Account).

6. **Salesforce | Select fields:** Choose which fields from the record you want available as merge codes in the workflow.

7. Save the action.

Status codes

- 200: Webhook received and workflow triggered successfully
- 400: The external integration returned an error

Salesforce | Record updated

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You will need:

- Salesforce OAuth authentication. More details in the authentication how-to guide.
- Access to the Salesforce record type you want to monitor

Configure the action

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

2. On the **Select Initiator** pop up, select the **Salesforce** initiator.

3. Select **Salesforce | Record updated**.

4. **Salesforce | Authentication:** Select an existing authentication or create a new authentication.

5. **Salesforce | Select record type:** Choose the Salesforce record type to monitor (e.g., Contact, Lead, Account).

6. **Salesforce | Select fields:** Choose which fields from the record you want available as merge codes in the workflow.

7. Save the action.

Status codes

- 200: Webhook received and workflow triggered successfully
- 400: The external integration returned an error

Salesforce | Opportunity closed won

You will need:

- Salesforce OAuth authentication. More details in the authentication how-to guide.

Configure the action

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

2. On the **Select Initiator** pop up, select the **Salesforce** initiator.

3. Select **Salesforce | Opportunity closed won**.

4. **Salesforce | Authentication:** Select an existing authentication or create a new authentication.

5. Save the action.

Status codes

- 200: Webhook received and workflow triggered successfully
- 400: The external integration returned an error

Salesforce | Opportunity closed lost

You will need:

- Salesforce OAuth authentication. More details in the authentication how-to guide.

Configure the action

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

2. On the **Select Initiator** pop up, select the **Salesforce** initiator.

3. Select **Salesforce | Opportunity closed lost**.

4. **Salesforce | Authentication:** Select an existing authentication or create a new authentication.

5. Save the action.

Status codes

- 200: Webhook received and workflow triggered successfully
- 400: The external integration returned an error

Salesforce | Case closed

You will need:

- Salesforce OAuth authentication. More details in the authentication how-to guide.

Configure the action

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

2. On the **Select Initiator** pop up, select the **Salesforce** initiator.

3. Select **Salesforce | Case closed**.

4. **Salesforce | Authentication:** Select an existing authentication or create a new authentication.

5. Save the action.

Status codes

- 200: Webhook received and workflow triggered successfully
- 400: The external integration returned an error

Salesforce | Initiate from Salesforce Flow

Initiating a workflow via a Salesforce Flow differs from the other pre-built Salesforce initiators. It does not require the extensive Salesforce permissions that initiators like Record Updated or Opportunity Closed Lost require, and it gives you more granular control over trigger conditions because those conditions are built directly into the Salesforce Flow itself.

You will need:

- Salesforce OAuth authentication. More details in the authentication how-to guide.
- The ability to add and create Flows in Salesforce
- The ability to add HTTP callout actions to your Flows in Salesforce

Configure the action

1. Open your workflow in **Workflow Builder**.
2. On the **Select Initiator** pop up, select the **Salesforce** initiator.
3. Select **Salesforce | Initiate from Salesforce Flow**.
4. Click **Next** on the initiator overview screen.
5. Copy the provided webhook URL and paste it into an HTTP callout action in your Salesforce Flow.
6. **Custom Fields (optional):** Define which fields the webhook should accept. Fields can be passed as query parameters or as JSON in the body of a POST request. These fields can then be used in Survey Invite steps, Send Email steps, or other workflow actions.
    - Custom fields can be passed via POST or GET requests.
    - Fields passed by Salesforce that are not configured in Alchemer will be ignored.
    - The request must use a flat key-value pair structure. Nested objects and arrays in the JSON body will be ignored.
7. **Custom Headers (optional):** Add custom header names and values as an added security measure. This ensures the workflow only initiates when the pre-specified HTTP header key/value pairs are passed in. Requests with missing or invalid headers will be dropped and return a 400 error.
8. Click **Save** to complete the initiator setup.

Status codes

- 200: Webhook received and workflow triggered successfully
- 400: The external integration returned an error (invalid or missing headers, malformed request)

Testing and Troubleshooting

Testing and Validation

How to test

- Trigger the workflow by creating, updating, or closing the relevant Salesforce record (or activating your Salesforce Flow).
- Monitor individual runs in the **Monitor** tab.
    - Click on each run to view metadata outputs.

How to verify results

- Set a send email action to yourself with action metadata included.
- Verify that the expected Salesforce event generated a workflow run.

Monitoring Integration Activity

Where to find logs

- Go to **Monitor**.
- Check the individual workflow steps.

What logs display

- Inputs received from Salesforce
- Workflow output or returned status

Troubleshooting

Authentication issues

- Incorrect or expired OAuth session
- Missing Salesforce permissions required for the integration

Record trigger issues

- Salesforce object type not matching the configured initiator
- Record event did not fire (e.g., record was imported in bulk rather than created individually)

Salesforce Flow issues

- HTTP callout not configured or pointing to the wrong Alchemer webhook URL
- Flow not activated in Salesforce
- Salesforce user lacks permission to add HTTP callout actions

API errors

- Salesforce validation failures
- Endpoint or runtime errors

FAQs

What permissions do I need?

Integration Manager in Alchemer and OAuth access to Salesforce. For the Initiate from Salesforce Flow action, you also need the ability to create and edit Flows in Salesforce and add HTTP callout actions.

When does the integration run?

On the configured trigger event — when a record is created, updated, or closed in Salesforce, or when a Salesforce Flow fires the HTTP callout.

Why isn't my workflow triggering?

Check the Monitor tab for authentication errors, incorrect object configuration, or Salesforce Flow issues. For Flow-based triggers, confirm the Flow is active and the webhook URL is correct.

What if I need additional functionality?

Contact Alchemer Support for enhancement requests.

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