Salesforce Integration for Alchemer Workflow

Overview

Salesforce is a cloud-based CRM platform used by organizations to manage customer relationships, sales pipelines, and business data. It provides teams with tools to track leads, manage contacts, automate workflows, and gain insights across the customer lifecycle.

The Alchemer integration with Salesforce supports automated record lookups, record creation, record updates, and record upserts. The Alchemer Salesforce integration allows Alchemer to use information from Salesforce to get data, personalize workflow paths, enrich routing logic, create merge codes, and update information in Salesforce without manual intervention.

Common uses for the Alchemer Salesforce integration

- Personalize outbound emails and workflow steps using Salesforce record data
- Use Salesforce record fields in workflow logic and branching
- Automate record creation and updates between Alchemer and Salesforce
- Upsert Salesforce records to keep data in sync without duplicates
- Reduce manual data entry and record maintenance
- Keep Salesforce records synchronized with respondent or operational data collected in Alchemer

What can the Alchemer Salesforce integration do?

- Get record
- Create record
- Update record
- Upsert record

You will need

- Salesforce OAuth authentication (sign in with your Salesforce account)
- 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 Salesforce integration in workflow

Salesforce | Get Record

You will need:

- Salesforce login credentials
- Fields containing a unique identifier for the Salesforce record you want to retrieve

Configure the action

1. Open your workflow in **Workflow Builder**.
2. On the right side, drag and drop the **Salesforce** connection where you want the action to trigger.
3. In the connection box, click the pencil icon in the top-right corner.
4. Select **Salesforce | Get Record**.
5. **Salesforce | Authentication:** Select an existing authentication or create a new one.
6. **Salesforce | Domain:** Enter your Salesforce My Domain. What is my domain?
7. **Salesforce | Object type:** Select the Salesforce object type you want to retrieve (e.g., *Contact*, *Lead*, *Account*, *Opportunity*).
8. **Salesforce | Find Record:** Select the Alchemer field containing the lookup value.
9. **Salesforce | Get data back:** Select the Salesforce fields you want returned.
10. Save the action.

Status codes

- 200: A record was successfully found
- 201: Query succeeded but no record was found
- 202: Multiple records were found (first returned is used)
- 400: Error returned by Salesforce API

Salesforce | Create Record

You will need:

- Salesforce login credentials
- Fields containing the data you want to use to create the record

Configure the action

1. Open your workflow in **Workflow Builder**.
2. On the right side, drag and drop the **Salesforce** connection where you want the action to trigger.
3. In the connection box, click the pencil icon in the top-right corner.

4. Select **Salesforce | Create Record**.

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

6. **Salesforce | Domain:** Enter your Salesforce My Domain. What is my domain?

7. **Salesforce | Object type:** Select the Salesforce object type you want to create (e.g., *Contact*, *Lead*, *Account*, *Opportunity*).

8. **Salesforce | Create Record:** Select the Alchemer fields containing the values you want to use to create the record in Salesforce.

9. **Salesforce | Get data back:** Select metadata fields (e.g., *message*, *status code*) to help debug your integration.

10. Save the action.

Status codes

- 200: Record was successfully created
- 400: The Salesforce API returned an error

Salesforce | Update Record

You will need:

- Salesforce login credentials
- Fields containing a unique identifier for the Salesforce record you want to update

Configure the action

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

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

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

4. Select **Salesforce | Update Record**.

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

6. **Salesforce | Domain:** Enter your Salesforce My Domain. What is my domain?

7. **Salesforce | Object type:** Select the Salesforce object type you want to update (e.g., *Contact*, *Lead*, *Account*, *Opportunity*).

8. **Salesforce | Find Record:** Select the Alchemer field containing the lookup value.

9. **Salesforce | Update Record:** Select the Alchemer fields containing the values you want to use to update the record in Salesforce.

10. **Salesforce | Get data back:** Select metadata fields (e.g., *message*, *status code*) to help debug your integration.

11. Save the action.

Status codes

- 200: Record was successfully updated
- 400: The external integration returned an error

Salesforce | Upsert Record

You will need:

- Salesforce login credentials
- Fields containing a unique identifier for the Salesforce record
  - You can only use email for Contact and Lead lookup, otherwise this integration requires the record ID

Configure the action

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

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

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

4. Select **Salesforce | Upsert Record**.

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

6. **Salesforce | Domain:** Enter your Salesforce My Domain. What is my domain?

7. **Salesforce | Object type:** Select the Salesforce object type you want to upsert (e.g., *Contact*, *Lead*, *Account*, *Opportunity*).

8. **Salesforce | Find Record:** Select the Alchemer field containing the unique identifier used to look up the existing record.

9. **Salesforce | Upsert Record:** Select the Alchemer fields containing the values you want to use to create or update the record in Salesforce.

10. **Salesforce | Get data back:** Select metadata fields (e.g., *message*, *status code*) to help debug your integration.

11. Save the action.

Status codes

- 200: Record was successfully inserted
- 201: Record was successfully updated

- 400: The external integration returned an error

Testing and Troubleshooting

Testing and Validation

How to test

- Trigger the workflow and monitor individual runs in the **Monitor** tab.
    - Click into individual workflow runs to see input/output metadata.
- Confirm the expected retrieval, creation, update, or upsert occurs in Salesforce.
- Use metadata values returned to verify success or help debug issues.

How to verify results

- Check the impacted Salesforce record directly in Salesforce.
- Ensure all retrieved or updated values match workflow expectations.

Monitoring Integration Activity

Where to find logs

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

What logs display

- Input/Output

Troubleshooting

Authentication issues

- Incorrect or expired OAuth session
- Missing permissions in Salesforce
    - **Note:** If using the Tray.io integration, ensure the authenticating Salesforce user has the **Approve Uninstalled Connected Apps** permission enabled.

Lookup failures

- Invalid or missing field values used for lookup
- No matching record found

Mapping errors

- Incorrect field formatting
- Unsupported or read-only fields

API errors

- Salesforce validation failures
- Endpoint or object type restrictions

FAQs

What permissions do I need?

Integration Manager in Alchemer and API permissions in Salesforce. If using Tray.io, the authenticating Salesforce user must also have the **Approve Uninstalled Connected Apps** permission.

When does the integration run?

When the workflow triggers and reaches the Salesforce integration step.

Can I use multiple Salesforce actions in one workflow?

Yes. Actions can work independently or together.

Why isn't my data updating?

Check the Monitor logs for lookup issues, mapping problems, or API errors.

What if I need additional functionality?

Contact Alchemer Support for enhancement requests.

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