# Contact List Initiator for Alchemer Workflow

Starts a workflow for each contact in an Alchemer contact list on the date you specify.

> You will need these items to configure the Contact List initiator:
> - An Alchemer API key
> - A contact list setup in Alchemer
> - A date in the contact list for when the workflow should start for that contact (typically a custom field)
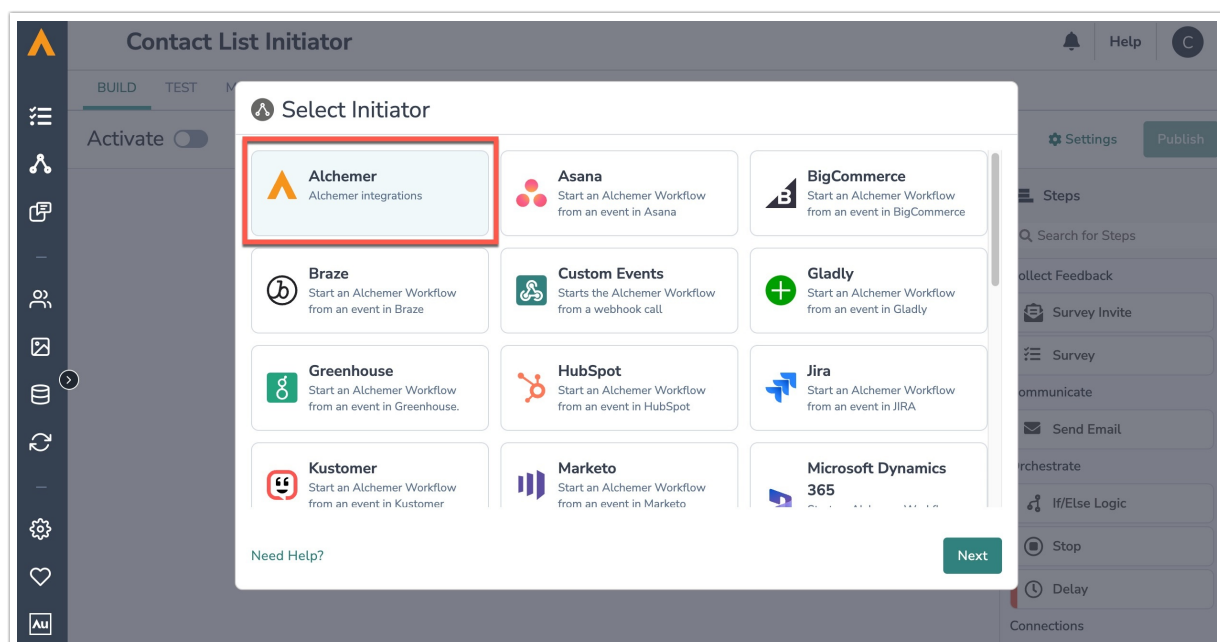> - A field in the contact list than can be updated with the result of the initiator (optional)

> As a best practice, we don't recommend using the contact list initiator with very large contact lists.

This initiator checks the contact list and starts the workflow for the appropriate contacts each day. This initiator also makes all of the contact list fields available in your workflow as merge codes.

For example, let's say you have a contact list for new employees. After an employee is hired, just add the employee to the contact list with their start date. The initiator checks the contact list each day and starts for the workflow for the new employees that have a start date of that day.

Follow these steps to use the Contact List initiator:

1. When selecting an initiator, click "Alchemer".

2. Select "Contact list initiator".

## Select Action

**Contact list listener**
Start a Workflow for contacts on a contact list

Need Help?                                          Previous      Next

3. Click "Next" on the initiator overview screen.

## Configure Initiator

### Alchemer | Contact list listener

Starts a Workflow for each contact in a Contact List based on criteria you set.

*You will need:*

- An Alchemer API key

- A contact list setup in Alchemer

- A date in the contact list for when the Workflow should start for that contact (usually a custom field)

- A field in the contact list that can be updated with the result of the initiator (optional)

Previous      Next

4. Click "New authentication". Them name your authentication and provide your Alchemer API Key and Secret.
*Optional: Select your Alchemer API region.*

> This initiator uses the Alchemer API to pull contact lists.
>
> For more information on finding your Alchemer API credentials,  go here.
>
> For more information on scoping/restricting API access, go here.



5. Select the contact list you want to use for this workflow. Any contact lists available to you will be available in the dropdown. If you are not seeing any contact lists, you will need to create one.

> All of the contact and contact list fields for the chosen contact lists will be available as merge codes in the workflow.

## Configure Initiator      ✕

Alchemer | Select contact list

Select the contact list you want to use for this Workflow.

**Select Contact List***(optional)*

Contact list 2     ⌄

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Previous    **Next**

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6. Optional: Select a field in the contact list that will be updated with information about the Workflow run when the Workflow is started.

> Here is an example of what the field will be updated with: Workflow 664e19b997f58 started at 2024-05-30T16:44:00.943Z

> At this time you cannot update custom fields. We recommend using the URL field, title field, or any other contact field not used in your contact list.

## Configure Initiator

Alchemer | Select field to update

(Optional) Select a field in the contact list that will be updated with information about the Workflow run when the Workflow is started.
Note: At this time you cannot update custom fields.

**Select Update Field***(optional)*

Alchemer | Contact List | title

Previous    Next

7. Select the field that contains the date the should begin.

You can use custom fields to enter the time. You can learn more about custom fields  here.

Date Field Information and Requirements:
- For the field, Alchemer can accept a variety of time formats including:
  - ISO 8601 time stamp. Ex: 2024-09-27 18:00:00.000
  - Month, day, year. Ex: July, 2, 2034
  - MM/DD/YYYY. Ex;
- If timezone is not specified, Alchemer will assume UTC

## Configure Initiator

Alchemer | Select date field

Select the field that contains the date the Workflow should begin

**Select Date Field**(optional)

Alchemer | Contact List | custom_field_datetime1

Previous    Next

8. Set when you would like this initiator to start running and set an end date after which this initiator should no longer run.

The initiator ones runs once per day starting at the date and time you set below. The timezones here are your local timezone (the timezone set in your browser).

## Configure Initiator ✕

### Alchemer | Schedule

This initiator runs once per day starting at the date and time you set below.

- Set when you would like this initiator to start running.
- Set an end date after which this initiator should no longer run.

**Start date***

Fri, May 31st 2024, 4:13 pm 🗓

**End date***

Mon, June 3rd 2024, 4:20 pm 🗓

Previous    Next

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9. Click "Save" to complete setup.

10. Use the contact list fields in your workflow as merge codes. For example, set the email address and customize the survey invite message.

| From Address | noreply | @alchemer.com (Alchemer) ▾ |
| --- | --- | --- |
| Reply To | No Reply <noreply@surveygizmo.com> | |
| To | [stepquestion('value'), step='start', id='Alchemer | Contact | email_address'] | |

Quick fills: Me

| Workflow | Search | 🔍 | Close |
| --- | --- | --- | --- |
| About Your Account | Integration Fields (30) | | |
| | Alchemer \| Contact \| business_phone | | Insert |
| | Alchemer \| Contact \| custom_field_currency1 | | Insert |
| | Alchemer \| Contact \| custom_field_datetime1 | | Insert |
| | Alchemer \| Contact \| custom_field_datetime2 | | Insert |
| | Alchemer \| Contact \| custom_field_number1 | | Insert |
| | Alchemer \| Contact \| custom_field_text1 | | Insert |

| Subject | Your next step is ready |
| --- | --- |

Dear [stepquestion('value'), step='start', id='Alchemer | Contact | first_name'].

Continue on your journey

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If you change the fields in your contact list, you will need to go through the steps above again

**Related Articles**