SFTP Workflow Initiators

> The SFTP integration is available for purchase as an add-on. If you are interested in purchase, please contact us for additional information.

Overview

SFTP (Secure File Transfer Protocol) is a secure method for transferring files between systems. Organizations often use SFTP servers to share CSV exports of contacts, customers, and other records.

The Alchemer integration with SFTP supports automated workflow initiation based on CSV file contents. The SFTP initiator connects to your SFTP server on a schedule (daily, weekly, and so on), downloads all CSV files from a source directory you specify, and starts a separate workflow run for each row. All columns in the CSV file, including custom fields, are available in the workflow and surveys as merge codes. Processed files are moved to a processed directory you specify. You can also check each contact's suppression status so workflows only run for contacts who are not suppressed.

Common uses for the Alchemer SFTP integration

- Send survey invitations to contacts from a scheduled CSV export
- Automate bulk processing of contact or customer records stored on an SFTP server
- Use CSV column values as merge codes to personalize workflows and surveys
- Skip suppressed contacts automatically before a workflow runs
- Reduce manual uploads of large CSV datasets

What can the Alchemer SFTP integration do?

- Start workflow for each row in a CSV file
- Start workflow for each row in a CSV file with suppression check

You will need

- SFTP login information. More details in the authentication how-to guide.
- An Alchemer plan that includes the SFTP integration add-on and the Integration Manager permission enabled.
    - Contact us if you are unsure if your plan includes integrations.

Setup Alchemer SFTP integration in Workflow

SFTP | Start workflow for each row in a CSV file

Starts a separate workflow run for each row in the CSV files pulled from your SFTP source directory.

You will need:

- SFTP login information. More details in the authentication how-to guide.
- Your CSV files located on an SFTP server
- At least one CSV file with the column headings you wish to be available as merge codes must exist in the source directory now

Configure the action

1. Open your workflow in **Workflow Builder**.
2. On the **Select Initiator** pop up select the **SFTP** initiator.
3. Select **SFTP | Start workflow for each row in a CSV file** .
4. Click **Next** on the initiator overview screen.
5. **SFTP | Authentication:** Select an existing authentication or create a new authentication using your SFTP details. Make sure **SFTP** is selected as the protocol when authenticating.
6. **SFTP | Source directory:** Select the directory where your source CSV files are located. At least one CSV file with the column headings you want available as merge codes must exist in this directory. All CSV files in the source directory will be processed during scheduled runs.
7. **SFTP | Processed directory:** Select the directory where CSV files will be moved once they are processed. The processed directory must be a subdirectory of the source directory.
8. **SFTP | Column headers:** After Alchemer finds your CSV column headers, click **Next**.
9. **SFTP | Schedule for runs:** Set how frequently you want to get the CSV files from the SFTP server. Runs take place at the specified interval, at the same time of day as the time set in **Start running on**. The date and time displayed are in your local time zone.
10. Click **Save** to complete setup. On this screen you can view all available merge codes.

SFTP | Start workflow for each row in a CSV file with suppression check

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Starts a workflow run for each row in the CSV files pulled from your SFTP source directory, after checking the suppression status of each contact. A workflow run is only started for contacts that are not suppressed.

You will need:

- SFTP login information. More details in the authentication how-to guide.
- Your CSV files located on an SFTP server
- At least one CSV file with the column headings you wish to be available as merge codes must exist in the source directory now
- A column in your CSV file containing the contact's email address

Configure the action

1. Open your workflow in **Workflow Builder**.
2. On the **Select Initiator** pop up select the **SFTP** initiator.
3. Select **SFTP | Start workflow for each row in a CSV file with suppression check** .
4. Click **Next** on the initiator overview screen.
5. **SFTP | Authentication:** Select an existing authentication or create a new authentication using your SFTP details. Make sure **SFTP** is selected as the protocol when authenticating.
6. **SFTP | Source directory:** Select the directory where your source CSV files are located. At least one CSV file with the column headings you want available as merge codes must exist in this directory. All CSV files in the source directory will be processed during scheduled runs.
7. **SFTP | Processed directory:** Select the directory where CSV files will be moved once they are processed. The processed directory must be a subdirectory of the source directory.
8. **SFTP | Column headers:** Alchemer retrieves a sample file from your SFTP server to identify the column headers. Wait for discovery to finish, then select the column that contains the contact's email address. This is used to check whether the contact is suppressed.
9. **SFTP | Schedule for runs:** Set how frequently you want to get the CSV files from the SFTP server. Runs take place at the specified interval, at the same time of day as the time set in **Start running on**. The date and time displayed are in your local time zone.
10. Click **Save** to complete setup. On this screen you can view all available merge codes.

Testing and Troubleshooting

Testing and Validation

How to test

- Upload a test CSV file to your SFTP source directory before a scheduled run.
    - Monitor individual runs in the **Monitor** tab and click each run to view the metadata for each row.

How to verify results

- Verify that each CSV row generated an independent workflow run.
- For the suppression check initiator, confirm that suppressed contacts did not start a workflow run.
- Confirm processed files were moved to your processed directory.

Monitoring Integration Activity

Where to find logs

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

What logs display

- Inputs received per row
- Workflow output or returned status

Troubleshooting

Authentication issues

- Incorrect SFTP host, username, or password
- A protocol other than SFTP selected when authenticating

Directory issues

- No CSV file in the source directory when setting up the initiator
- Processed directory is not a subdirectory of the source directory
- Other files in the source directory that you do not want processed

CSV issues

- Incorrect header formatting or missing columns
- Missing or invalid email addresses for the suppression check
- Invalid characters or malformed data

FAQs

What permissions do I need?

The Integration Manager permission in Alchemer. To check or grant it, go to **Account** > **User Management** > **Users**, select the user, and make sure **Integration Manager** is checked in the Permissions section. Admins can grant this permission to other team members.

When does the integration run?

On the schedule you set. All CSV files in the source directory are processed on each scheduled run.

What does the suppression check do?

It checks each contact's email address against your suppression list. A workflow run is only started for contacts who are not suppressed.

Why isn't my workflow triggering?

Check the Monitor tab, confirm your CSV files were uploaded to the source directory before the

scheduled run, and verify your SFTP authentication.

What if I need additional functionality?

Alchemer is continuously releasing updates to Workflow initiators. If you have specific use cases, questions, or feedback, Contact us here

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