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.

In this guide we'll walk though configuring the Alchemer Workflow initiators that use your SFTP server.

The following SFTP initiators are currently available:

- CSV Initiator: Start the Alchemer Workflow for each row in a CSV file pulled from an SFTP location.
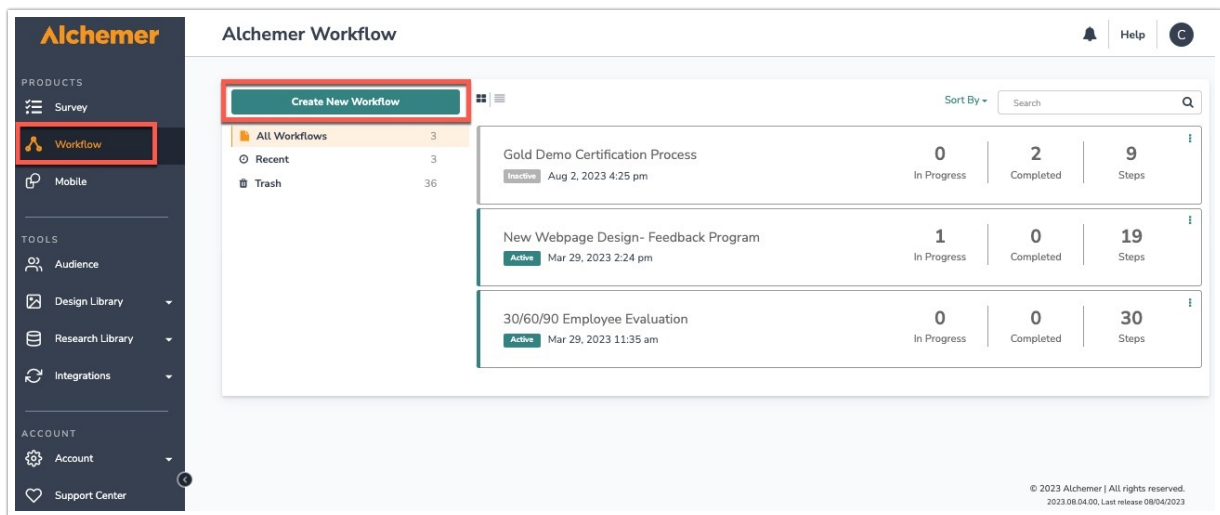
CSV Initiator

How it works:

1. The CSV Initiator connects to your SFTP server regularly (daily, weekly, etc.) and downloads all of CSV files from a 'source' directory you specify.

2. The initiator starts a separate Workflow run for each contact/row in the CSV files.

3. All of the data/columns in the CSV file are available for use in the Workflow and surveys as merge codes, including any custom fields.

4. The CSV files are moved to a 'processed' directory you specify on your SFTP server once they have been processed.

You will need:
- Your CSV files located on an SFTP server
- Your SFTP login information
- At least one CSV file with the column headings you wish to be available as merge codes must exist in the source directory now

1. Create a new Workflow.

2. Name your Workflow.

Create New Workflow

* What would you like to name this Workflow?

Customer Service Feedback Workflow

Cancel   Start Building

3. After creating a new Workflow, select SFTP from the initiator list.

Select Initiator

Alchemer Alchemer integrations	**Alchemer Digital** Integration with Alchemer Digital	**Custom Events** Starts the Alchemer Workflow from a webhook call
Gladly Start an Alchemer Workflow from an event in Gladly	**Gorgias** Gorgias integration with Alchemer	**Integration factory prototype** Prototype
Microsoft Dynamics 365 Start an Alchemer Workflow from an event in Microsoft Dynamics 365	**SFTP**	**Salesforce** Start an Alchemer Workflow from an event in Salesforce
Scheduled Start the Alchemer Workflow on a schedule	**Share Link** When a user clicks on a custom workflow link	**Shopify** Start an Alchemer Workflow from an event in Shopify
Survey Listener When a given survey is completed	**Twilio** Alchemer integration with Twilio	**Unanet** Alchemer integration with Unanet

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4. Select "Start workflow for each row in a CSV file.

Select Action

Start workflow for each row in a CSV file
Start the Alchemer Workflow for each row in a CSV file pulled from an SFTP location

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

⚙ Configure Initiator

CSV | Initiate workflow for each row in a CSV file

Start the Alchemer Workflow for each row in a CSV file pulled from an SFTP location.

You will need:
- Your CSV files located on an SFTP server
- Your SFTP login information
- At least one CSV file with the column headings you wish to be available as merge codes must exist in the source directory now

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6. Click "New authentication" and then provide your SFTP details. Click "Next" after successfully authenticating.

Please ensure SFTP is selected as the protocol when authenticating.

Configure Initiator

CSV | Initiate workflow for each row in a CSV file

Start the Alchemer Workflow for each row in a CSV file pulled from an SFTP location.

You will need:
- Your CSV files located on an SFTP server
- Your SFTP login information
- At least one CSV file with the column headings you wish to be available as merge codes must exist in the source directory now

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8. Select the directory where your source CSV files are located.

> Important Notes:
> 1. At least one CSV file with the column headings you wish to be available as merge codes must exist in the source directory.
> 2. All CSV files in the source directory will be processed during scheduled runs.

Configure Initiator

CSV | SFTP source directory

Select the directory where your source CSV files are located.

Select source directory*

source   ⌄

Note:

- At least one CSV file with the column headings you wish to be available as merge codes must exist in the source directory now
- All CSV files in the source directory will be processed during scheduled runs

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9. Select the directory where the CSV files will be moved to once they are processed.

> Important notes:
> 1. CSV files are moved to the processed directory once they are processed in a scheduled run.
> 2. The processed directory must be a subdirectory of the source directory.

Configure Initiator

CSV | SFTP processed directory

Select the directory where the CSV files will be moved to once they are processed.

Select processed directory*

processed	∨

Note:

- CSV files are moved to the processed directory once they are processed in a scheduled run
- The processed directory must be a subdirectory of the source directory

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10. *Optional.* After Alchemer successfully finds your CSV column headers, click "Next".

Configure Initiator

CSV | Column headers

We are currently retrieving your sample file from the SFTP server to identify the column headers. Please wait while we complete the discovery process before proceeding.

Successfully found CSV column headers*(optional)*

Type to search	∧

-- Click to see the CSV column headers --

person_id

email

claim_gid_delim

claim_status_code_delim

gender

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11. Set the schedule for how frequently you want to get the CSV files from the SFTP server.

> The run will take place at the specified interval, occurring at the same time of day at the time set in the 'Start running on' field. The date/time displayed here is your local time zone.

Configure Initiator

Interval*

```
1
```

Time unit*

```
Days                                                    ⌄
```

Start running on*

```
Mon, March 31st 2025, 6:00 pm                           🖑
```

Stop running by*

```
Sat, March 31st 2035, 6:00 pm                           📅
```

The run will take place at the specified interval, occurring at the same time of day as the time set in the 'Start running on'. The date/time displayed here is in your local time zone'

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12. Click "Save" to complete initial setup. In this screen you can see all available merge codes. You can monitor your workflow in the Monitor tab.

> Next Steps:
>
> 1. Ensure that your CSV files are uploaded to your SFTP source directory prior to each scheduled run.
>
> 2. Ensure that there are no other files that you do not wish to be processed in the source directory. All files in the source will be processed on each scheduled run.

Configure Initiator

CSV | Setup complete

You can monitor this workflow from the Monitor tab.

Next steps
- Ensure that your CSV files are uploaded to your SFTP source directory prior to each scheduled run
- Ensure that there are no other files that you do not wish to be processed in the source directory. All files in the source directory will be processed on each scheduled run.

Learn more

Workflow merge codes*(optional)*

-- Click to see the merge codes that will be available in the workflow --

Previous   **Save**

FAQs

▷   What permissions do I need within Alchemer to set-up and use the SFTP integration?

▷   This initiator doesn't fit my use cases, or I want to provide feedback to the Alchemer Product Team!

Related Articles