

Alchemer Workflow Excel Initiator

The Excel Integration for Alchemer Workflow is available for our business platform customers. If you are interested in purchasing, [please contact us for more information](#).

How it works

The Excel Initiator starts a new workflow for each row in your spreadsheet, just like the SFTP Initiator. You can configure filters to control which rows trigger workflows and set schedules to run it as needed.

Key capabilities

- **Trigger a workflow per row**: Each row in the Excel file can kick off its own workflow.
- **Apply filters**: Only include rows that meet specific conditions.
- **Run on schedule**: Automate workflows on a daily, weekly, or custom schedule.
- **No file upload required**: Connect directly to the Excel source.

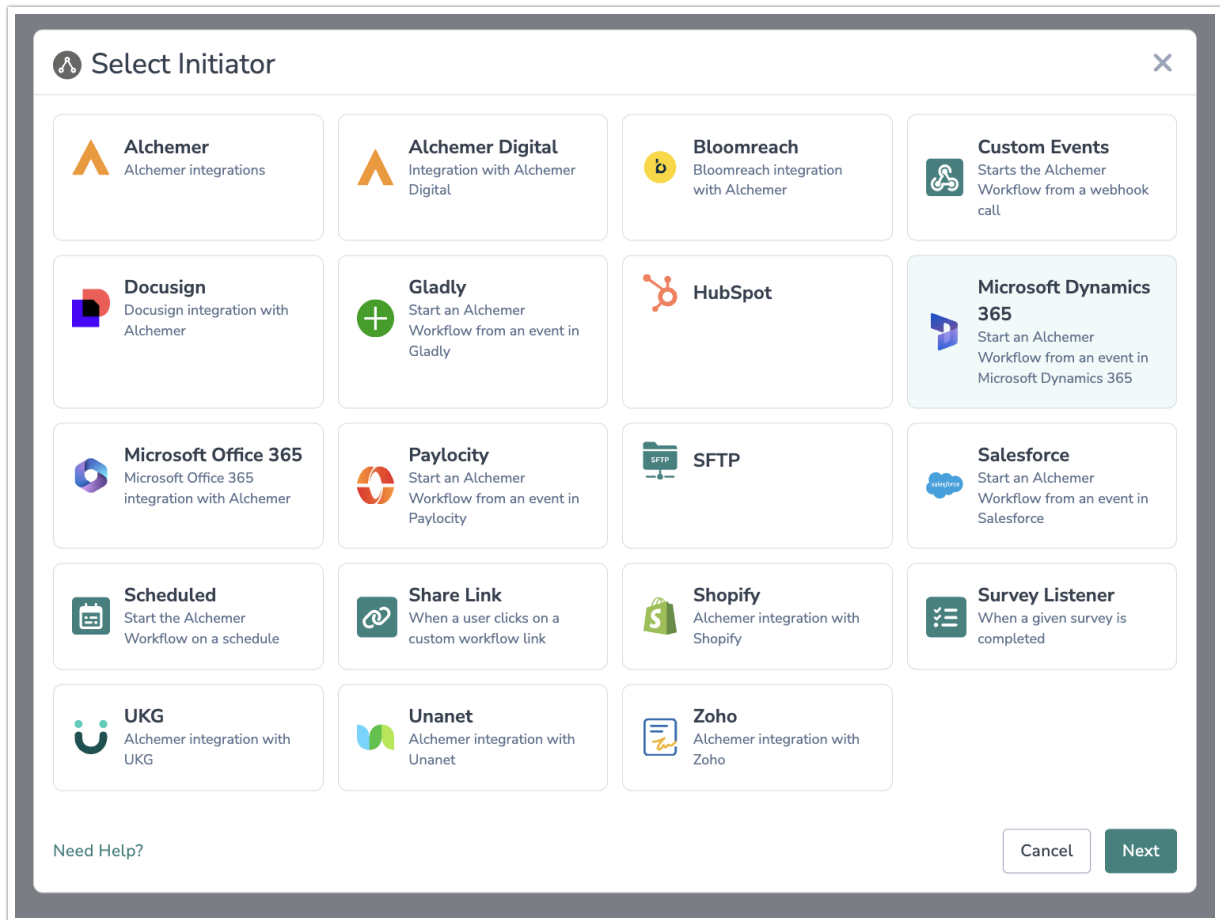
Adding an Excel Initiator

1. Create a Workflow in Alchemer and select your initiator.

For more information on building Workflows in Alchemer refer to the following documentation:

- [Getting Started with Alchemer Workflow](#)
- [Building a Workflow](#)

2. Select Microsoft Dynamics 365. Start an Alchemer Workflow from an event in Microsoft Dynamics 365.



Excel | Start Workflow from Excel

You will need:

- Your Office 365 login information
- An excel workbook with the data, in a table, you want to use to start the workflow.

1. Select "Excel | Push Data to Excel" as your action.
2. Click "Next" on the integration overview screen.

 Configure Initiator

Excel | Start Workflow from Excel

Start a workflow run for each row in an Excel table

You will need:

- Your Office 365 login information
- An excel workbook with the data, in a table, you want to use to start the workflow

Need help? [Learn more](#)

v251119

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3. Authenticate with your Office 365 account. Click next.

 Configure Initiator

Excel | Authentication

Authenticate with Office365

Office365 connected

Prod Test 6/2/25

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4. Select if the file you would like to use is on the OneDrive or SharePoint.

Configure Initiator

Excel | OneDrive or SharePoint

Please select if the file you would like to use is on OneDrive or SharePoint

OneDrive or SharePoint(optional)

OneDrive

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5. Enter the folder path where your Excel workbook is located.

Example: /MyFolder/MySubFolder

- Use / for the root folder
- Do not include the file name or extension
- Do not include "Shared Documents"
- Separate each folder with a slash

Configure Initiator

Excel | Folder path

Please enter the folder path where your Excel workbook is located.

Example:
/MyFolder/MySubFolder

Folder Path*

- Use / for the root folder
- Do not include the file name or extension
- Do not include "Shared Documents"
- Separate each folder with a slash

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6. Choose the Excel workbook that you would like to use to insert data into.

Configure Initiator

Excel | Choose workbook

Choose the Excel workbook that you would like to use to insert data into

Select Workbook*

Book.xlsx

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7. Choose the Excel worksheet that you would like to use to insert data into.

Configure Initiator

Excel | Choose worksheet **Configure Initiator**

Choose the Excel worksheet that you would like to use to insert data into

Select Worksheet*

Questions

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8. Choose the Excel table that you would like to pull data from.

Configure Initiator

Excel | Choose table

Choose the Excel table that you would like to pull data from.

Select table*

Table4

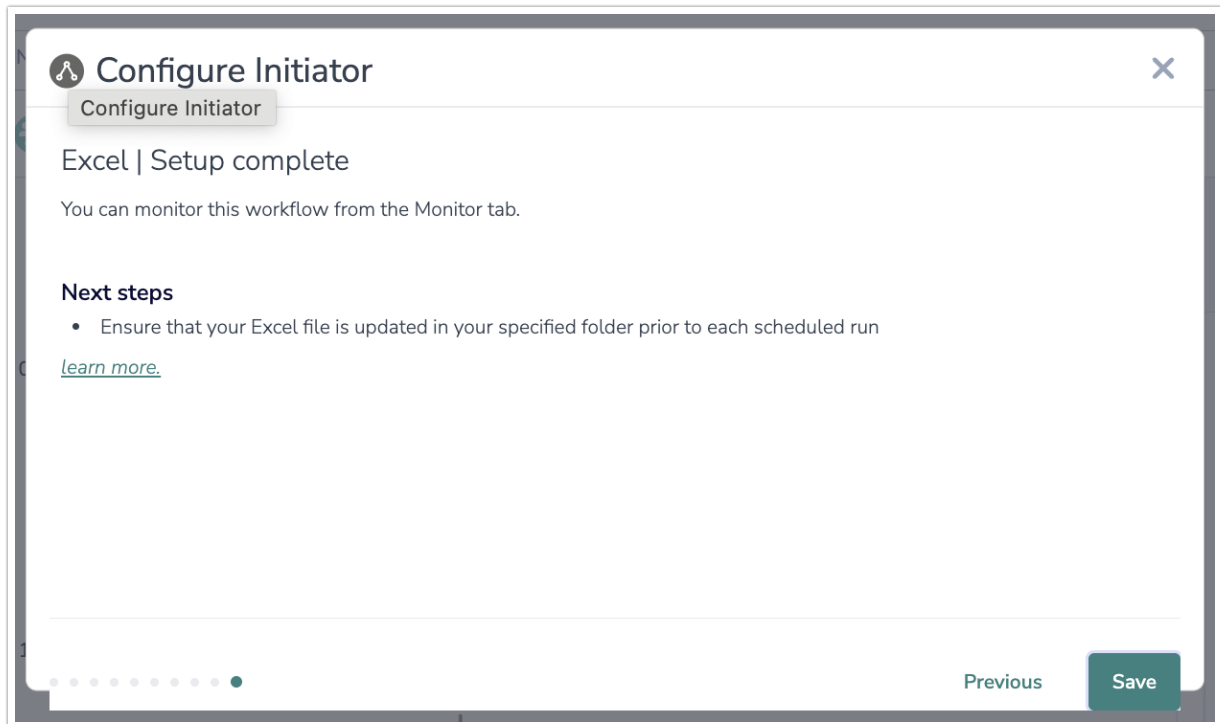
You will need to create a Table in your Excel sheet. You can create this by navigating to Insert > Table in Excel, [learn more](#).

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9. Set the criteria for which rows to use to start the workflow.
A workflow run will be started for every row in your table that is found after applying this filter.

10. Set the schedule for how frequently you want to pull data from Excel to start the workflow.

11. Setup complete.



Best practices

- Use clear headers in your Excel file to simplify field mapping.
- Test with a few rows before running on a large dataset.
- Review filter conditions carefully to avoid excluding important rows.

Now what / Where is my data?

All of the information from this integration is now available in this workflow and all surveys in this workflow. You can use them to:

- Add Merge Codes to Email or Survey Invite steps.
- Use with Logic in the workflow.
- Use to personalize the survey in the workflow.

FAQs

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

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

Related Articles