

# Airtable Alchemer Workflow Initiator

## Overview

[Airtable](#) is a cloud-based database and collaboration platform used by organizations to organize, store, and manage structured information such as records, tables, projects, and workflows

This Alchemer workflow initiator with Airtable lets you initiate workflows on a set schedule. When the Airtable initiator triggers, it starts a workflow run for each row in an Airtable workbook. This allows workflows to be automated to pull filtered rows, get the selected information, and use this information in subsequent workflow steps.

## Common uses for the Alchemer Airtable initiator

- Trigger scheduled workflows with Airtable data
- Automate data retrieval from Airtable to send emails or perform other workflow actions
- Reduce repetitive Get Data actions in workflows

## What can the Alchemer Alchemer initiator do?

- Trigger workflow for each Airtable row

## You will need

- Airtable login
- An Alchemer plan that includes integrations and the Integration Manager permission enabled.
  - [Contact us](#) if you are unsure if your plan includes integrations.

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## Setup Alchemer Airtable initiator in workflow

### Airtable Initiator

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#### You will need:

- Airtable login
- Airtable base with a table with data

#### Configure the action

1. Create and name a new workflow in **Workflow builder**.

2. Select **Airtable** initiator.
  3. Select **Start workflow from Airtable**.
  4. **Airtable | Authentication**: Select an existing authentication or [create a new authentication](#).
  5. **Airtable | Select base**: Select the Airtable base with the table with data you want to use.
  6. **Airtable | Select table**: Select the table you want to get data from.
  7. **Airtable | Find records**: Select which columns contain data you want to filter on. Match the selected columns to data you enter manually on the right side.
    - a. You must type in the data you want to filter under 'matches this value (manual entry)'. You must click Set to 'your-entry' to set the right side value.
    - b. Note: We recommend adding at least one filter. Otherwise, the workflow will trigger on every Airtable row.
  8. **Airtable | Schedule for runs**: Set the schedule for the frequency you want to pull data from Airtable to start the workflow.
    - a. Note: When setting the runtime start and end dates, you must click the small check to save your entry.
  9. Save the action.
  10. Ensure the Airtable table is updated prior to each scheduled run.
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## Testing and Troubleshooting

### Testing and Validation

#### How to test

- Trigger the workflow and monitor individual runs in monitor tab in your workflow
  - Click on individual workflow runs to see metadata outputs

#### How to verify results

- Ensure retrieved or updated values match expectations.
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### Monitoring Initiator Activity

## Where to find logs

- Go to **Results** → **Monitor**
  - View workflow versions and steps.
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## Troubleshooting

### Runtime issues

- If your run is taking a while to complete, narrow the scope of the initiator by adding more filters.

### API errors

- Authentication has expired in Airtable
    - You can check this by going to your Profile in Airtable, and selected integrations. There is a list of your integrations and if they have an expired authentication.
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## FAQs

### What permissions do I need?

Integration Manager in Alchemer.

### When does the initiator run?

On the schedule you set when setting up the Airtable initiator.

### Why isn't my data updating?

Check the Action Log for lookup issues, mapping problems, or API errors.

### What if I need additional functionality?

Contact Alchemer Support for enhancement requests.

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