# Email Integrations for Alchemer Workflow

## Overview

In Alchemer Workflows, email can be used as a trigger source to start workflows automatically when specific messages arrive.

The Alchemer integration with Email supports automated workflow triggers based on incoming email content or attachments. The Alchemer Email integrations allow workflows to begin when an email is received, extract message details or CSV contact lists, populate workflow fields, and route contacts through automated paths—all without manual intervention.

### Common uses for the Alchemer Email integrations

- Start workflows automatically from incoming emails
- Populate workflow fields for routing, personalization, and logic
- Automate contact processing sent from external systems via email
- Reduce manual data entry and allow external systems to "push" data into Alchemer by emailing CSV files

### What can the Alchemer Email integrations do?

- Trigger workflows when a new email is received
- Extract email data from the body
- Retrieve and parse CSV files from email attachments

### You will need

- An Alchemer plan that includes integrations and the Integration Manager permission enabled.
  - Contact us if you are unsure if your plan includes integrations.

## Setup Alchemer Email integrations in a workflow

### Email | Start workflow from an email

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**You will need:**
- To send emails with the data you want to include in the workflow

- Optional: Header or sender validation

**Configure the action**

1. Open your workflow in **Workflow builder**.

2. Click the workflow trigger and select **Email** as the starting method.

3. Select **Email | Start workflow from an email**.

4. **Email | Email address**: Use the email provided to initiate your workflow.
   - IMPORTANT: Ensure you are using the example template and format shown to pass your data using JSON

5. **Email | Configure data fields**: Enter your comma separated values that you will be sending.
   - (Example: Name,Email,State)

6. **Email | Security**: You may optionally provide email headers and an approved 'from' email address for security and validation.

7. Save the trigger.

**Status codes**
- 200: Successfully retrieved email data.
- 400: Error processing the email or extracting metadata.

## Email | Start workflow from a CSV contact list attached to an email

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**You will need:**
- An Email Trigger inbox configured in the workflow
- A CSV file attached to the inbound email
- CSV formatted with column headers

**Configure the action**

1. Open your workflow in **Workflow builder**.

2. Click the workflow trigger and select Email as the starting method.

3. Select **Email | Start workflow from a CSV contact list attached to an email**.

4. **Email | Email address:** Use the email provided to initiate your workflow.

5. **Email | Selected headers:** Enter your comma separated values that you will be sending.
   - (Example: Name,Email,State)

6. **Email | Validation:** You may optionally provide email headers and an approved 'from' email

address for security and validation.

7. Save the trigger.

**Status codes**
- 200: File successfully opened.
- 400: No files found or did not pass validation.

# Testing and Troubleshooting

## Testing and Validation

**How to test**
- Send a test email to the workflow inbox.
    - Include a CSV attachment when testing CSV triggers.
- Add an additional step to make sure you are receiving the merge codes.
- Monitor individual runs in the **Monitor** tab of your workflow.
- Confirm that expected fields populate based on the email or CSV data.

**How to verify results**
- Check the workflow fields populated from the email trigger.
- For CSV imports, check that all expected contacts were created.
- Ensure retrieved values match expectations.

## Monitoring Integration Activity

**Where to find logs**
- Go to **Monitor**.
- Select the step you want to inspect.

**What logs display**
- Run was instantiated
- Subsequent steps

## Troubleshooting

**Email delivery issues**
- Email blocked by spam filters
- Incorrect workflow inbox address
- Message too large or unsupported attachment type

**CSV parsing failures**
- Missing header row

- Inconsistent column structure
- Invalid formatting
- Header names do not match

**Trigger issues**
- Email did not match sender or header validation

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## FAQs

**What permissions do I need?**

Integration Manager in Alchemer.

**When does the integration run?**

When an email is received in the workflow inbox and meets trigger criteria.

**Why isn't my data updating?**

Check the **Monitor** tab for filter mismatches, missing attachments, CSV format issues, or processing errors.

**What if I need additional functionality?**

Contact Alchemer Support for enhancement requests.

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