

Workflows (Automation)

Workflows let you automate repetitive tasks in Alchemer Voice so they run on their own instead of being handled by hand. Common uses include generating summaries, applying labels, producing reports, and sending custom notifications.

Triggers

Every workflow starts with a trigger that decides when it runs.

Trigger	When it runs
Based on a date or schedule	Runs on a set schedule, such as weekly on specific days or a monthly digest.
When a conversation is processed	Runs when a new conversation that matches your criteria finishes processing, for example to deliver an instant summary as soon as a qualifying call is uploaded.
When an insight is generated	Runs when a new insight matches your criteria, for example to label or tag matching insights automatically.

Build a workflow

1. Open the Workflow Builder in Alchemer Voice.
2. Choose the trigger that should start the workflow.
3. Define a filter that narrows which items the workflow acts on, such as all support calls from the last 7 days.
4. Add one or more actions for the workflow to perform:
 - Send an email to an individual user or a group.
 - Ask the Analyst to run a saved prompt against matching conversations or insights.
 - Apply or remove labels automatically.
 - Add a condition to branch the workflow based on the conversation.
 - Dispatch a webhook to send data to another system.

To send to more than one email address, use a group alias or add the addresses to each email action.

Best practices

- Use Test workflow to run a workflow on demand, such as when labeling data you have already collected.
- Schedule regular digests for leaders and teams.

- Automate summary prompts for recurring meetings.
- Keep workflow names clear and consistent.

Tips

- Review your workflows regularly and disable any you are no longer using.
- Create a separate workflow for each use case or function.

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