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, sending custom notifications, and posting to Slack.

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.

Conversations that ended before a source's first sync (historical backfill) do not fire the conversation trigger. Use **Loop workflow** for older data.

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.
    - Post the results to one or more Slack channels. See the Slack integration.
    - Comment on a Jira issue with an insight, once Jira is connected.
    - 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.

New workflows are disabled until you enable them. Use **Test workflow** in the menu, then switch the **Enabled / Disabled** toggle at the top to turn the workflow on.

Steps

Which steps you can add depends on the steps before them and on connected apps.

Step	What it does	Availability
Get conversations	Collects conversations matching filters.	After a schedule trigger only. Use this or Get insights, not both.
Get insights	Collects insights matching filters.	After a schedule trigger only.
Ask the Analyst	Runs a prompt you write against the conversation, or the collected conversations or insights, and keeps the answer for later steps such as an email. If nothing matches, the path stops.	After a conversation or schedule trigger, or after Get conversations or Get insights.
Free text condition	Asks a yes/no question about the conversation or insight. The workflow continues only on yes. Phrase it as a condition, such as “Does the customer mention a competitor?”	After a conversation or insight trigger.
Send email	Sends the results to the Workflow owner, a Specific address, the Internal meeting organizer (only if they are a user in your Alchemer Voice account), or an Account user (a user field on the linked CRM account, if your CRM has one). The subject starts with "Alchemer Voice:" and you can set your own. For several recipients, add several steps or use a group address.	Always.
Send a Slack message	Posts the results to one or more channels. Invite the Four/Four Slack app to each channel first. New channels can take up to 30 minutes to appear. See the Slack integration.	Only once Slack is connected.
Apply labels / Remove labels	Adds or removes labels on the conversations or insights found. If no filter criteria are set, labeling is skipped rather than applied to everything. See Labels & Tagging.	After Get conversations, Get insights, or a conversation or insight trigger.

Step	What it does	Availability
Comment on Jira issue	Posts the insight as a comment on a chosen Jira issue.	After an insight trigger, and only once Jira is connected.
Dispatch webhook	Notifies any webhook destination subscribed to the Workflow topic, with references to the workflow and what it processed. Destinations are created on the Connections page.	Always.

Workflows can also send data to Zapier through webhooks. See the Zapier and Webhooks articles.

Test, loop, and monitor

Test workflow runs it once on a sample item matching the trigger. Check the result on the **Runs** tab.

Loop workflow applies a conversation- or insight-triggered workflow to existing data, for example to label history. It shows how many items will be affected, and you can narrow them with **Filter**. Emails and messages are skipped unless you select **Run messaging steps**. It is not available for workflows containing Ask the Analyst or Free text condition.

The Runs tab shows whether each run finished, is waiting, is running, or failed.

Ownership

Workflows run as their owner. Ask the Analyst uses the owner's access, and "Workflow owner" emails go to them. If the owner leaves, steps that rely on them, such as emailing them, are skipped and noted in the run.

Example patterns

- **Weekly team digest:** schedule trigger, Get conversations (last 7 days), Ask the Analyst, Send email.
- **Summary of important calls:** conversation trigger with criteria, Ask the Analyst, Send a Slack message.
- **Competitor tracking:** conversation trigger, Free text condition, Apply labels.
- **Backfill a label:** build the workflow, then Loop workflow.

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.

Permissions

Building and managing workflows needs a role with a workflow permission. See Roles and permissions.

Action or area	Permission
Create and manage your own workflows	Manage my workflows
Manage everyone's workflows, and see the All workflows tab	Manage all workflows
Create webhook destinations on the Connections page	Admin

Without either workflow permission, Workflows is missing from the left navigation. Ask your admin. Without Manage all workflows, only My workflows is shown.

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