Attio

The Attio integration brings your Attio companies, people, deals, and workspace members into Alchemer Voice, so conversations and insights link to the right records and you can filter by Attio data. The integration is read-only: Alchemer Voice doesn't write anything back to Attio.

What's imported

Attio	Alchemer Voice
Companies	Accounts
People	Contacts
Deals	Opportunities. A deal counts as won or lost based on the status of its stage in Attio.
Workspace members	Users. Suspended members are removed.

Custom Attio objects aren't imported. Alchemer Voice imports everything first, and after that Attio notifies Alchemer Voice when records are created, changed, or deleted, so changes usually arrive within moments. Records you delete in Attio are removed from Alchemer Voice. To receive these notifications, Alchemer Voice asks Attio for permission to read records, read object configuration, read workspace members, and manage webhooks.

Set up

Before you begin

- An Attio user who can authorize integrations for the workspace, typically a workspace admin.
- The **Manage connections** permission in Alchemer Voice. See Roles and permissions.

Steps

1. In Alchemer Voice, go to **Admin** > **Connections**.
2. Under **Customer relationship management**, find **Attio** and click **Connect**.
3. Sign in to Attio, choose your workspace, and approve access.

You're returned to Alchemer Voice. The card shows **Syncing...** and then **Connected** once the first import is complete.

You can connect Attio alongside another CRM, and Alchemer Voice links conversations to records from each. To disconnect, click **Disconnect** on the card.

Custom filters

1. On the Attio card, click **Settings** (the cog). It appears once the card shows **Connected** or **Syncing…**.
2. Under **Custom filters**, click **Add custom filter**.
3. Choose the **Record type**, the **Field**, the **Field type** (Picklist, Multi-picklist, Numeric, Text search, Date range, Boolean, or User), and a **Name**.
4. Click **Save**.

You can't edit a saved filter. To change one, delete it with the bin icon and create a new one. Alchemer Voice uses the first value of each Attio attribute, so if an attribute holds several values, only the first is used for filtering.

Troubleshooting

- **Authentication failed:** Alchemer Voice can no longer use the connection, for example because access was revoked in Attio. Click **Disconnect**, then **Connect** and approve access again.
- **Syncing… for a long time:** The first import of a large workspace takes time. If it hasn't finished after a few hours, contact Alchemer Support.
- **Authentication error banner on the Connections page:** Attio rejected the sign-in. Try again as a workspace admin, and contact Alchemer Support if it keeps happening.
- **Changes aren't showing:** Updates arrive through Attio notifications. If they stop, disconnect and reconnect Attio, or contact Alchemer Support.

Permissions

Connecting and disconnecting Attio in Alchemer Voice requires the **Manage connections** permission. Without it, you can't connect or disconnect the integration. See Roles and permissions.

If you need help, contact Alchemer Support.

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