How to Schedule Reminders in Alchemer Workflow

Sometimes Alchemer Workflow users require multiple respondents to participate in the workflow in a linear way (or a series of responses from the same respondent). This is common for approval workflows. When a workflow user sends a survey invitation, they often need to remind the survey taker to complete the survey, so the workflow isn't stalled.

In Alchemer Workflow, customers can use a URL variable combined with page or question logic to set up the survey for each respondent in the workflow. Then they can use Delays, If/Else logic, and Send Email actions to send reminders if the questions for a respondent have not been answered.

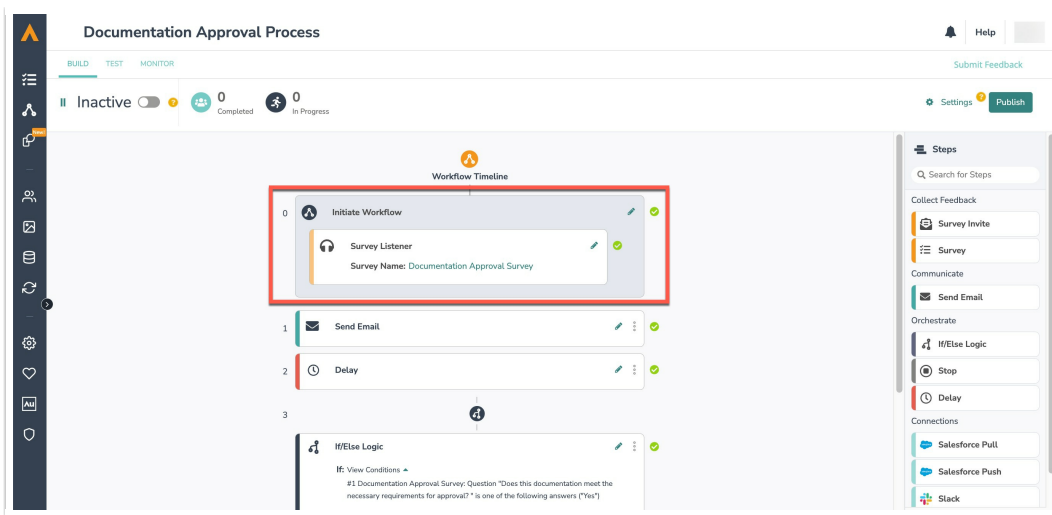## Scheduling Reminders in Alchemer Workflow

On the survey to which the workflow is listening:

1. First, create all questions for every respondent in the workflow chain.

2. Specify a URL variable to identify the respondent. For example:
   a. The first respondent completes the survey to initiate the workflow.

   b. The second respondent uses "res = 2".

   c. The third respondent uses "res = 3".

3. Set up the questions or pages for each respondent to only show if the correct URL variable is present.

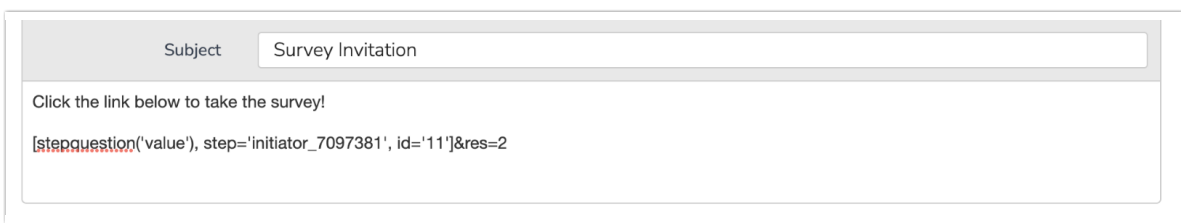4. Set up a hidden value for the Edit Link.

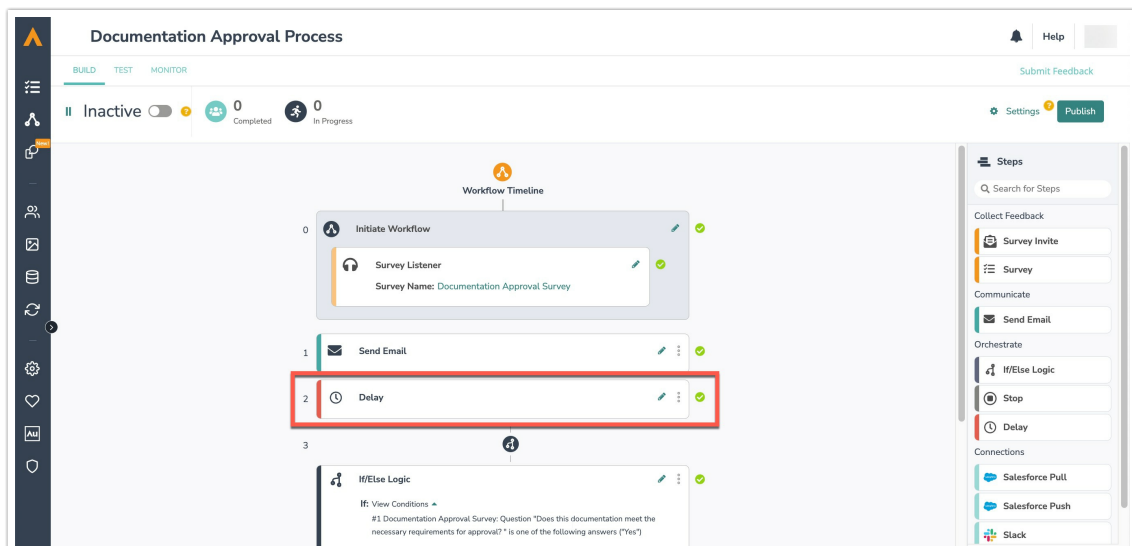> For more details on setting up URL variables, go to this article.

On the workflow:

1. Initiate the workflow with a Survey Listener.

2. Add a Send Email step to invite the next respondent to take the survey. In the email body, use a merge code for the hidden value that has the Edit Link and append the URL variable for the second respondent. For example:
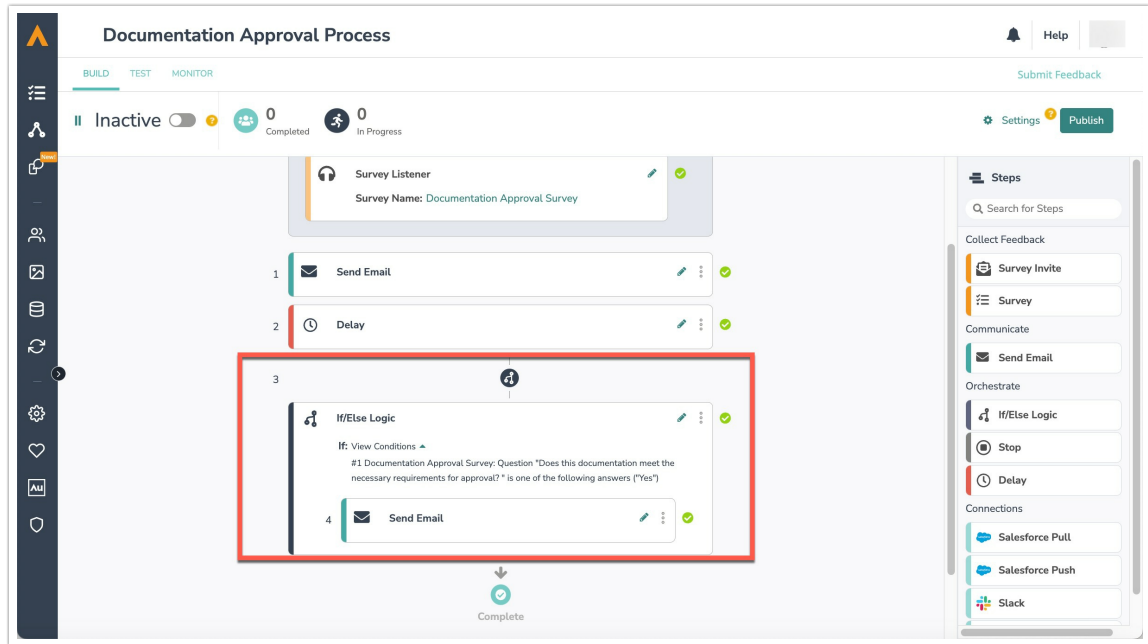

3. Add a Delay step and set it to the desired time to wait before sending the reminder.

4. Add an If/Else logic block.
    a. As the condition, check if a question (preferably required) meant for the second respondent has been answered.

    b. If answered, add a Send Email step as your next survey invitation. In the email body, use a merge code for the hidden value that has the Edit Link and append the URL variable for the

third respondent.

c. Else (the question hasn't been answered), add the desired action step as your reminder, such as a Send Email or Slack step.

5. Repeat the above Delay step and If/Else logic block for as many times you'd like to send the reminder to the second respondent. For the third respondent, change the If/Else condition to check if a question meant for the third respondent has been answered and update the notification to go to the third respondent.

Limitations

This method will not be able to send a reminder to the first respondent or for the first response to the survey. Thus, we recommend starting your workflow with a survey listener and using the campaign reminder functionality for the first reminder.

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