

How to create a confirmation email in Workflow

These instructions detail how to make a confirmation email automatically sent to you in Workflow. Follow the steps sequentially, referring to the prerequisite guide for requesting a plugin if necessary. Alt text is available if needed.

Prerequisite guide: [Request Plugins](#)

1. View Workflow Step Settings
 - Click “Forms” tab in WordPress sidebar (1)

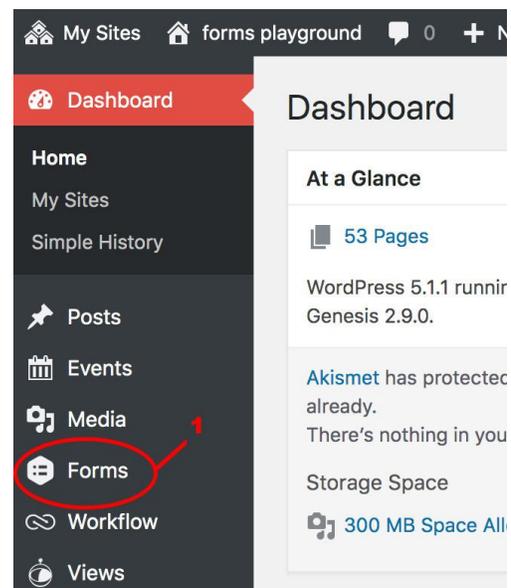


Figure 1

- Hover over “Settings” button under selected form (2)
- Click “Workflow” button (3)

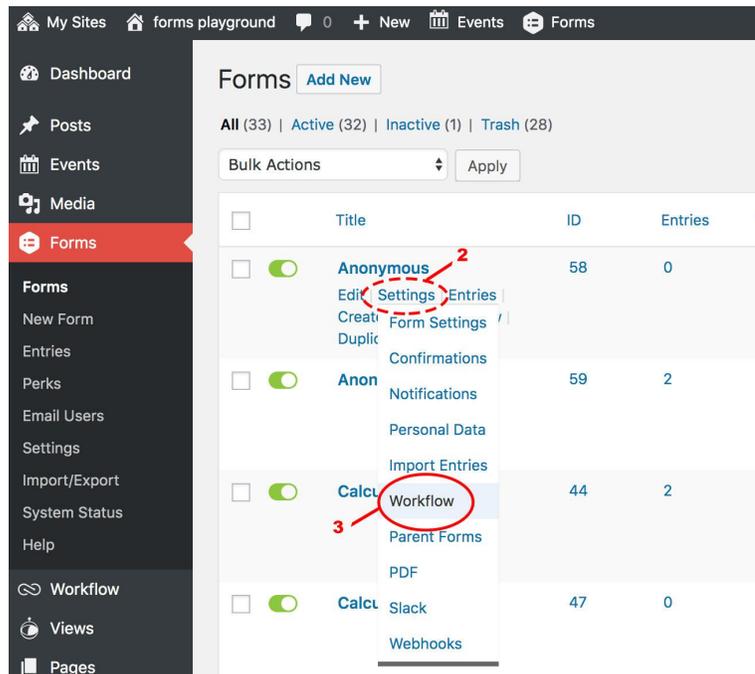


Figure 2

- Click “Add New” (4)

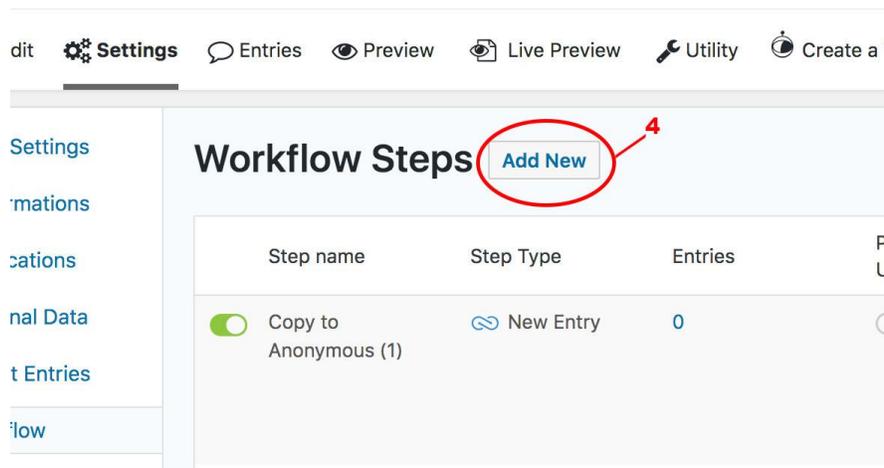


Figure 3

2. Create confirmation email

- Type new confirmation email name (5)

The screenshot shows a form titled "Workflow Step Settings". Under the "Step" section, there are three fields: "Name" (with a question mark icon and an asterisk), "Description", and "Step Type". The "Name" field contains the text "Approval" and is circled in red with a red line pointing to the number "5". The "Description" field is empty. The "Step Type" field is not visible in this specific view.

Figure 4

- Click "Approval" button (6)

The screenshot shows a grid of "Step Type" options. The "Approval" button, which features a green checkmark icon, is circled in red with a red line pointing to the number "6". Other buttons in the grid include "Slack", "Notification", "User Input", "Outgoing Webhook", "Add to Folder", "Remove from Folder", "Form Submission", "New Entry", "Update an Entry", "Update Fields", and "Delete an Entry".

Figure 5

- Scroll down to Email Field and click preferred Assignee (7)

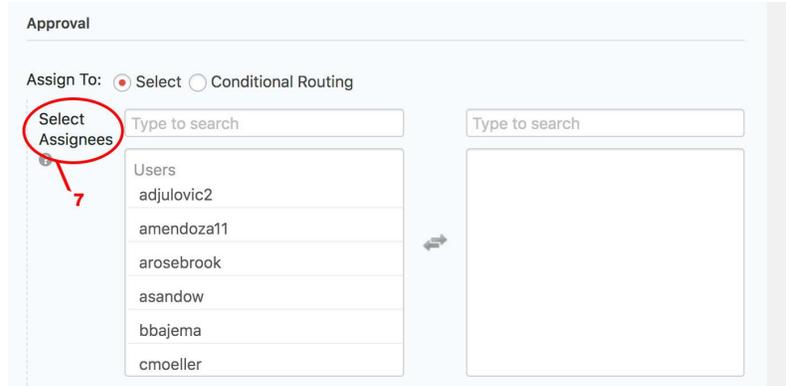


Figure 6

- Click preferred Approval Policy side button (8)

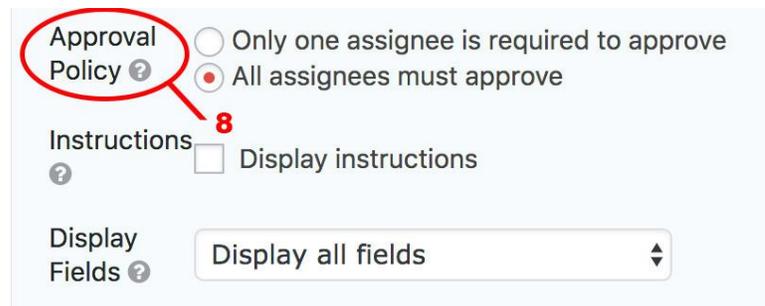


Figure 7

- Click “Send an email to the assignee” checkbox (9)

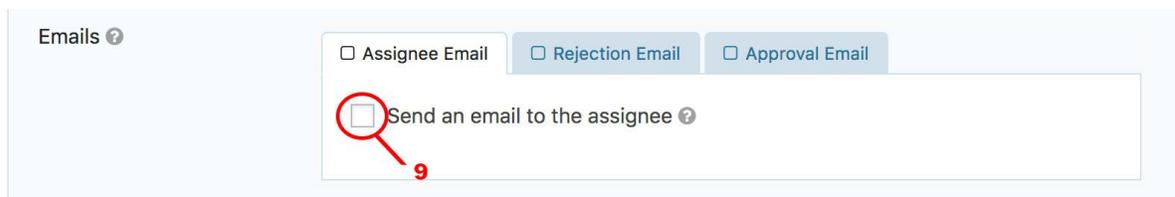


Figure 8

- Type “From” name (10)
- Type desired subject (11)

Emails ?

Assignee Email Rejection Email Approval Email

Send an email to the assignee ?

From Name 10
Your Name

From Email
{admin_email}

Reply To

BCC

Subject 11
Confirmation Email

Figure 9

- Enter email content inside text editor (12)

Message 12

Add Media

Visual Text

Paragraph B I [List Icons] [Quote Icon] [Link Icon] [Image Icon]

A new entry is pending your approval. Please check your Workflow Inbox.

P

Figure 10

3. Confirmation email reminder

- Click “Send reminder” checkbox (13)

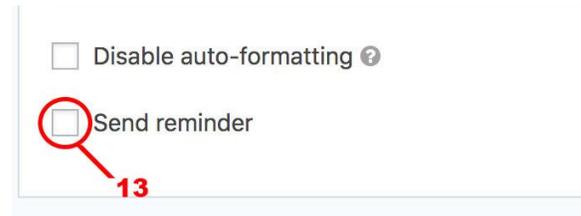


Figure 11

- Type amount of time before resending email (14)

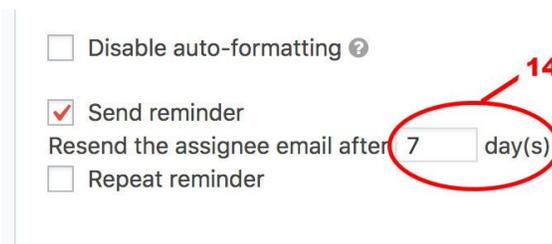


Figure 12

- Click “Repeat reminder” checkbox (15)

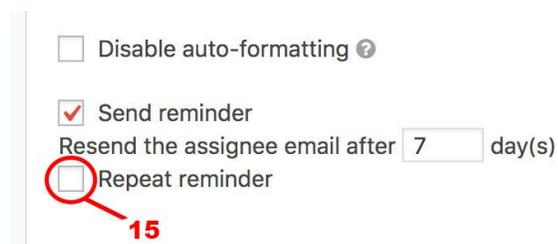


Figure 13

- Type amount of repeats (16)

Disable auto-formatting ?
 Send reminder
 Resend the assignee email after day(s)
 Repeat reminder
 Repeat every day(s) **16**

Figure 14

4. Confirmation email expiration

- Click “Schedule expiration” checkbox (17)

Workflow Note ? ⌵
 Expiration ? Schedule expiration **17**
 Next step if Rejected ⌵
 Next Step if Approved ⌵

Figure 15

- Click to “Delay” expiration (18)
- Type amount of time for expiration (19)
- Click “Status after expiration” drop down menu (20)
- Click preferred status of expiration

Expiration ? Schedule expiration
 Delay Date **18**
 This step will expire Day(s) ⌵ after the workflow step has started. **19**
 Status after expiration: ⌵ **20**

Figure 16

- Or Click to set “Date” (21)
- Type date of expiration (22)
- Click “Status after expiration” drop down menu (23)
- Click preferred status of expiration

Expiration ?

Schedule expiration

Delay Date

This step expires on yyyy-mm-dd

Status after expiration: Rejected

Figure 17

5. Confirmation email approval and rejection

- Click “Next step if Rejected” drop down menu (24)
- Click preferred action for rejects

Next step if Rejected

Next Step if Approved

Figure 18

- Click “Next Step if Approved” drop down menu (25)
- Click preferred action for approvals

Next step if Rejected

Next Step if Approved

Figure 19

6. Update settings

- Click “Update Step Settings” button at bottom of page (26)

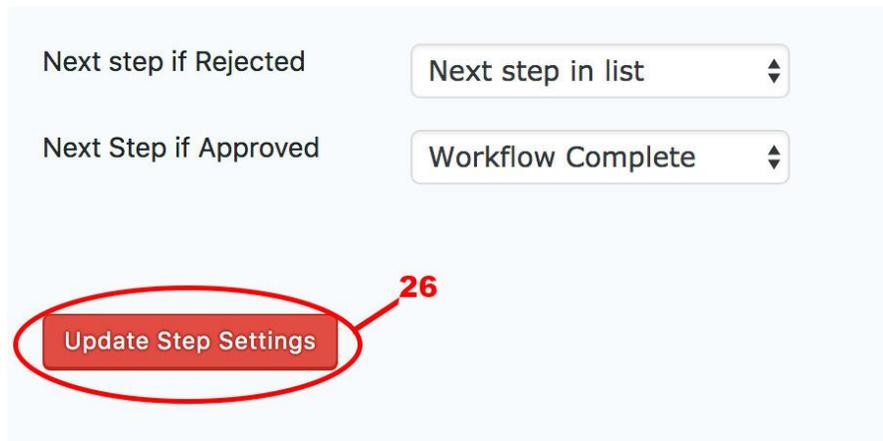


Figure 20

The confirmation email is now scheduled. This process can be repeated as many times as necessary. Refer back to these instructions as a reference for knowing how to create a Workflow confirmation email.

Alt Text Table: How to create a confirmation email in Workflow

Figure Number	Alt Text Title	Alt Text
Figure 1	Clicking “Forms” tab	The left side of the main dashboard is shown, with the “Forms” tab highlighted.
Figure 2	Hovering over “Settings” button and clicking “Workflow” Button	Under callout #2 the “Forms” tab is opened, with the “Settings” button highlighted.

		Under callout #3 the “Forms” tab is opened, with the “Workflow” button highlighted.
Figure 3	Clicking “Add New” button	The “Workflow Steps” tab is opened, with the “Add New” button highlighted.
Figure 4	Typing new confirmation email name	The “Workflow Steps” tab is opened, with the “Name” input highlighted.
Figure 5	Clicking “Approval” button	The “Step Type” menu is shown, with the “Approval” button highlighted.
Figure 6	Clicking Assignees	The email field is shown, with the “Select Assignees” button highlighted.
Figure 7	Clicking preferred Approval Policy side button	The “Approval Policy” side button is zoomed in on and highlighted.
Figure 8	Clicking “Send an email to the assignee” checkbox	The “Assignee Email” tab is opened, with the box next to “send an email to the assignee” box highlighted.
Figure 9	Typing “From” name and subject	The “Assignee Email” tab is opened. The “From Name” and “Subject” tabs are highlighted.
Figure 10	Entering email content inside text editor	The text editor is shown, with the “Message” keyword highlighted.
Figure 11	Clicking “Send reminder” checkbox	The “send reminder” checkbox is highlighted.
Figure 12	Typing amount of time for resending email	The amount of time indicator is highlighted.

Figure 13	Clicking "Repeat reminder" checkbox	The "repeat reminder" checkbox is highlighted.
Figure 14	Typing amount of Repeat reminders	The text input box that allows for typing the amount of repeat reminders under the "send reminder" section is highlighted.
Figure 15	Clicking "Schedule expiration" checkbox	The "schedule expiration" checkbox is highlighted.
Figure 16	Option 1	The expiration tab is shown. Under callout #18, the "Delay" button is selected and highlighted. Under callout #19, the expiration date selection is highlighted. Under callout #20, the status of expiration dropdown menu is highlighted.
Figure 17	Option 2	The expiration menu is shown. Under callout #21, the date button is selected and highlighted. Under callout #22, the expiration date menu is highlighted. Under callout #23, the "status after expiration" dropdown menu is highlighted.
Figure 18	Clicking "Next step if Rejected" drop down menu	The "next step if rejected" drop down menu is highlighted.
Figure 19	Clicking "Next Step if Approved" drop down menu	The "next step if approved" drop down menu is highlighted.

Figure 20	Clicking “Update Step Settings” button at bottom of page	The “Update Step Settings” button at the bottom of the page is highlighted.
-----------	--	---