

How to create an email notification In Workflow

These instructions detail how to make an email in Workflow to automatically send notifications to recipients. Follow the steps sequentially to complete the process. Alt text is available if needed.

Prerequisite guide: [Request Plugins](#)

1. Find Workflow Step Settings

- On WordPress dashboard, Click “Forms”(1)

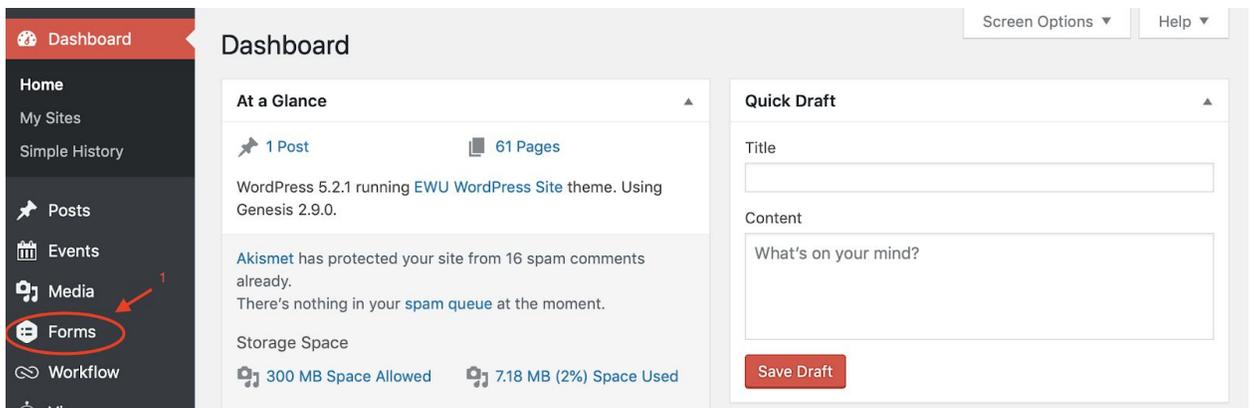


Figure 1

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

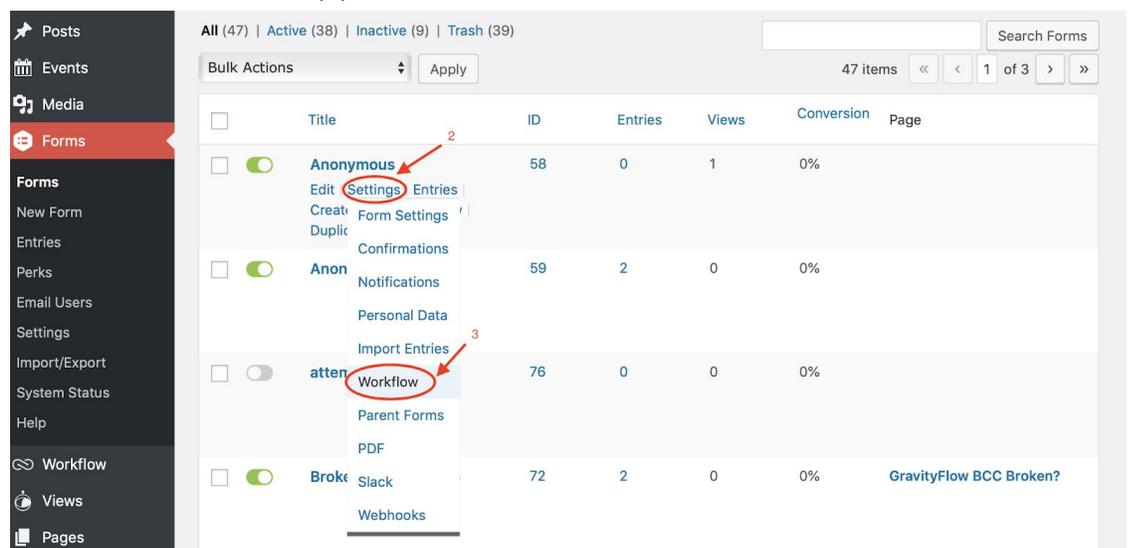


Figure 2

- Click “Add New”(4)

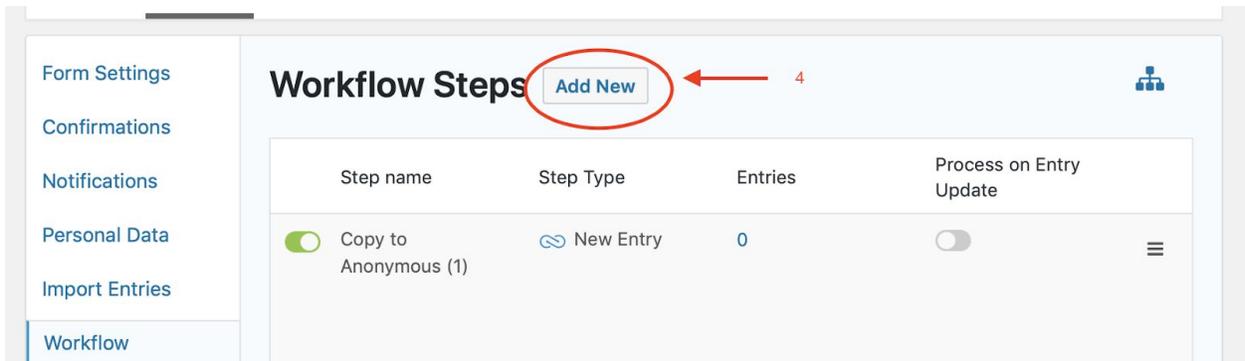


Figure 3

2. Set confirmation email

- Type new notification email name (5)
- Click “Notification” Button (6)

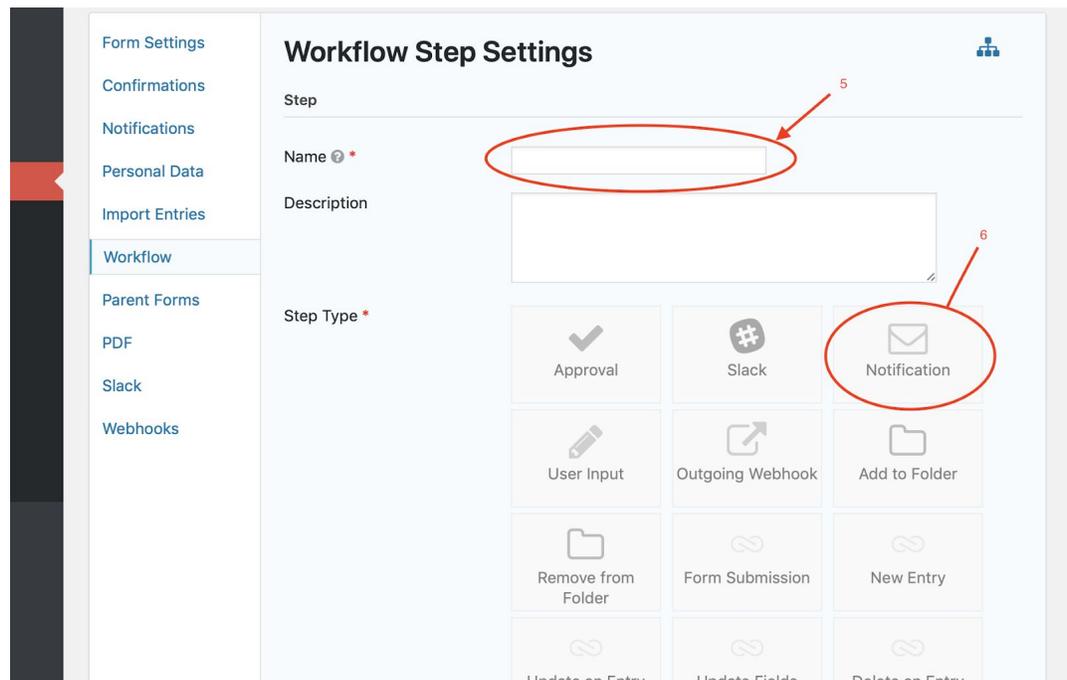


Figure 4

- Scroll down and click “Schedule this step” checkbox next to Schedule (7)
- Click to “Delay” (8)
- Type the amount of time in notification appearance (9)

Highlight ? Highlight this step

Condition ? Enable Condition for this step

Schedule ? Schedule this step

Delay Date

Start this step after the workflow step is triggered.

Notification

Figure 5

- Or Click “Date” (10)
- Type date of notification appearance (11)

Highlight ? Highlight this step

Condition ? Enable Condition for this step

Schedule ? Schedule this step

Delay Date

Start this step on

Figure 6

3. Set Type of notification

- Click “Enabled” checkbox next to Workflow notification (13)
- Select Assignees (14)

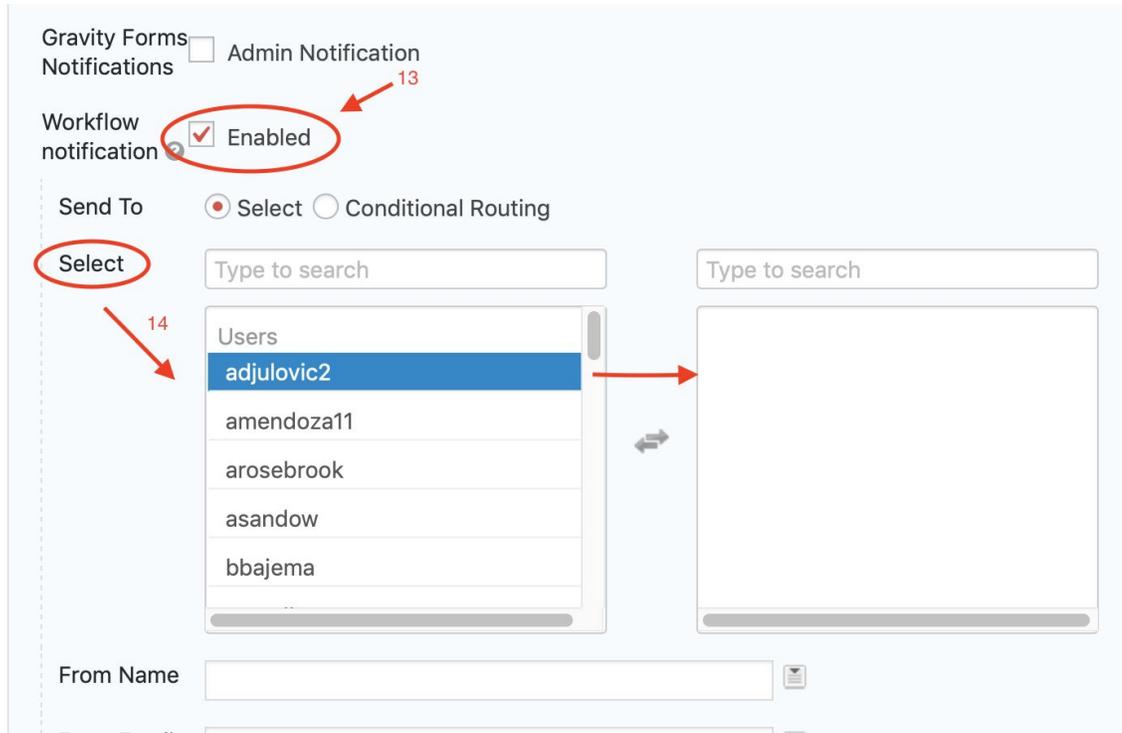


Figure 7

- Type "From" name (15)
- Type desired subject (16)
- Enter Email content inside text editor (17)

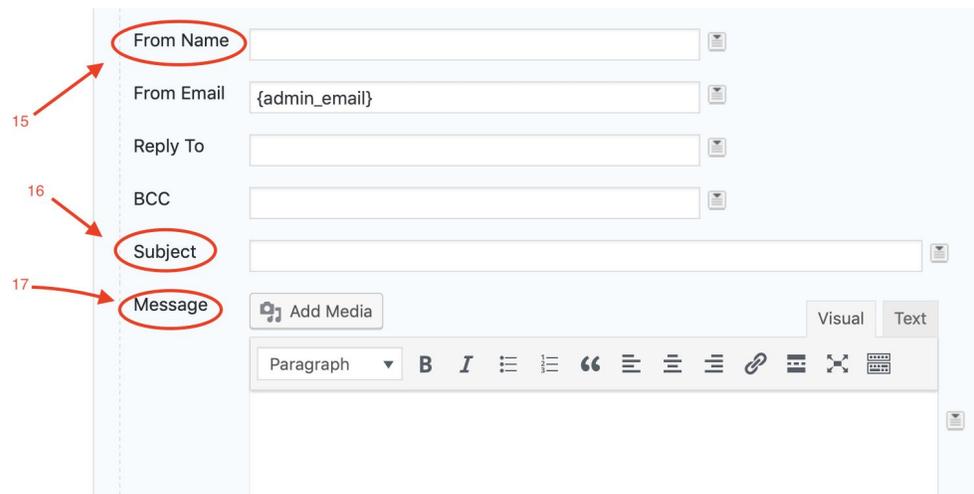


Figure 8

4. Finished notification action

- Click “Next Step” drop down menu (19)
- Click preferred action
- Click update “Step Settings” button at the bottom of page (20)

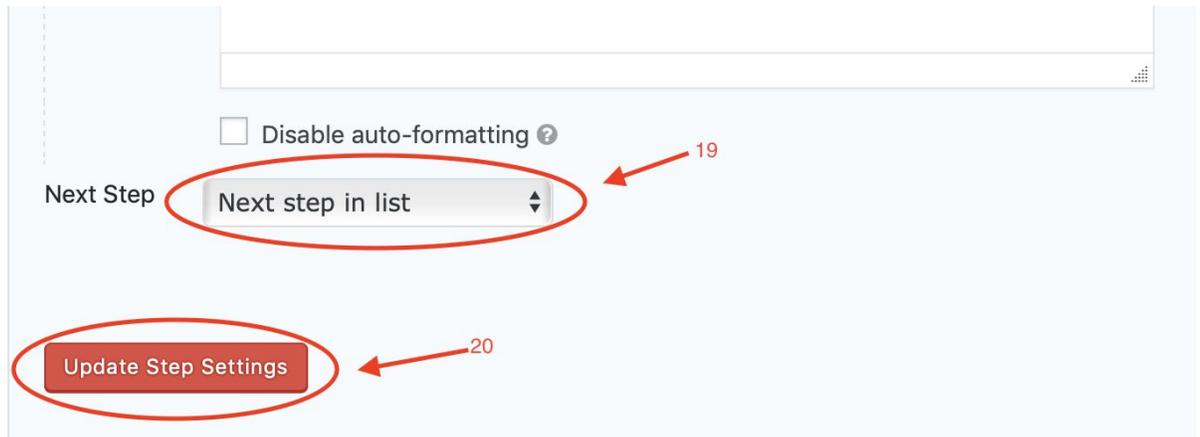


Figure 9

Email notification has now been set according to desired preferences. Refer back to these instructions whenever necessary for creating more email notifications in Workflow in the future.

Alt Text: How to Create an Email Notification in Workflow

Figure Number	Alt Text Title	Alt Text
Figure 1	Locating Forms	The left side of the main dashboard is shown, with the “Forms” tab highlighted.
Figure 2	Settings and “Workflow” Button	Under callout #2, the “Forms” menu is shown, with the “Settings” button highlighted. Under callout #3, the “Workflow” button under the “Settings” drop down menu is highlighted.
Figure 3	Adding a New Step	The “Workflow Steps” menu is shown, with the “Add New” button highlighted.
Figure 4	Setting Up Confirmation Email #1 and #2	Under callout #5, the “Name” text input box in the “Workflow Steps” menu is highlighted. Under callout #6, the “Notification” button is highlighted.
Figure 5	Setting Up Confirmation Email #3 and Adjusting Time of Confirmation Email #1	Under callout #7, the “schedule this step” button next to the “Schedule” indicator is highlighted. The “Schedule” menu is shown. Under callout #8, the “Delay” button is selected and highlighted. Under callout #9, the amount of time inputter is

		highlighted.
Figure 6	Adjusting Time of Confirmation Email #2	The "Schedule" menu is shown. Under callout #10, the "Date" button is selected and highlighted. Under callout #11, the date of notification selection is highlighted.
Figure 7	Setting Type of Notification #1 and Setting Type of Notification #2	Under callout #13, the "Enabled" box next to Workflow notification is highlighted. Under callout #14, the "Workflow Notification" menu is shown, with the "Select" button highlighted.
Figure 8	Setting Type of Notification #3 and Inserting Email Content	Under callout #15, the "From Name" input title is highlighted. Under callout #16, the "Subject" input title. Under callout #17, the text editor menu is shown, with the "Message" button highlighted.
Figure 9	Proceeding with Process of Creating Notification and Updating Settings	Under callout #19, the "Next Step" drop down menu is highlighted. Under callout #20, the "Update Step Settings" at the bottom of the page is highlighted.

