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)

🚯 Dashboard	Dashboard		Screen Options V Help V
Home My Sites	At a Glance	Quick Draft	
Simple History	📌 1 Post 📕 61 Pages	Title	
🖈 Posts	WordPress 5.2.1 running EWU WordPress Site theme. Using Genesis 2.9.0.	Content	
🛗 Events	Akismet has protected your site from 16 spam comments	What's on your mind?	
9 Media	already. There's nothing in your spam queue at the moment.		
E Forms	Storage Space		
🛇 Workflow	300 MB Space Allowed 37.18 MB (2%) Space Used	Save Draft	

Figure 1

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

🖈 Posts	All (47) Activ	e (38) Inactive (9) Trash (39)				Search Forms
🛗 Events	Bulk Actions	Apply				47 items 《 〈 1 of 3 〉 》
9j Media		Title	ID	Entries	Views	Conversion Page
😑 Forms 🔸		2				
Forms		Anonymous Kentries	58	0	1	0%
New Form		Create Form Settings				
Entries		Confirmations				
Perks		Anon Notifications	59	2	0	0%
Email Users		Personal Data				
Settings		Import Entries				
Import/Export		atten	76	0	0	0%
System Status		WORKHOW				
Help		Parent Forms				
🛇 Workflow	_	PDF				
A Views		Broke Slack	72	2	0	0% GravityFlow BCC Broken?
		Webhooks				
Pages						

Figure 2

• Click "Add New"(4)

Form Settings	orkflow Step	Add New	4		#
Notifications	Step name	Step Type	Entries	Process on Entry Update	
Personal Data	Copy to	🚫 New Entry	0		≡
Import Entries	Anonymous (1)				
Workflow					

Figure 3

- 2. Set confirmation email
 - Type new notification email name (5)
 - Click "Notification" Button (6)

Form Settings Confirmations	Workflow Step	o Settings	_	5
Notifications Personal Data Import Entries Workflow	Name 🕢 * Description			6
Parent Forms PDF Slack Webhooks	Step Type *	Approval User Input	Slack	Notification Add to Folder
		Remove from Folder	CS Form Submission	New Entry
		Undate an Entry	Lindate Fields	Delete an Entry

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 🕑	7 Enable Condition for this step
Schedule 🕑	8 Schedule this step
	Date Date
	Start this step Hour(s) \$ 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 10 Delax Date 11 Start this step of yyyy-mm-dd	

Figure 6

- 3. Set Type of notification
 - Click "Enabled" checkbox next to Workflow notification (13)
 - Select Assignees (14)

Gravity Forms Admin Notification					
Workflow notification	Enabled				
Send To	 Select O Conditional Routing 				
Select	Type to search		Type to search		
14	Users adjulovic2		•		
	amendoza11	\$			
	arosebrook				
	asandow				
	bbajema				
From Name					

Figure 7

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

	From Name	
15	From Email	{admin_email}
15	Reply To	
16	BCC	
2	Subject	
17	Message	Yisual Yest
		Paragraph \bullet B I \boxminus 66 \textcircled{E} \textcircled{E} \textcircled{E} \textcircled{P} \textcircled{E} \textcircled{R}
		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)

	ii.
Disable auto-formatting () Next Step Next step in list	
Update Step Settings	
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.

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

Alt Text: How to Create an Email Notification in Workflow

		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.