

Workflow Step - Send an Email

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Introduction

The Email Step allows you to send emails to a manually entered email address, or to email addresses collected in form responses above this Step in the Workflow Builder Map.

This Step combines the Auto-responder and Email Notification processing options that are used at the form level. The Email Step can be used to configure both internal and external email messages, and you can add as many as you would like for each form submission in your workflow.

To add this Step to your workflow, click the "Add Step" button on your Map and then select Email from the dropdown menu.

You can edit or delete this Step at any time by selecting it on the Map and opening the Properties Panel.

Upon selecting a form that has notifications enabled in a Form Step, an Email Step will be automatically added to the Workflow Builder Map and the form level email configuration will be copied over.

This feature is being slowly rolled out to all Enterprise and Compliance Cloud customers. Over the next several weeks, we will be progressively rolling out the new Workflow experience to customers on these plans. Keep an eye out for the "New" flag in your FormAssembly account to know when you can jump into this feature. It is not possible to request early access to this feature. We apologize for any inconvenience.

Please Note: The notification configuration settings from the selected form will only be copied over once. Any changes made in the Workflow Builder or in the form's Notification page will not affect each other.

Properties Panel Configuration

Adding the Email Step will automatically open the Properties Panel so that you can configure the Step. The Properties Panel for this Step contains the following tabs: Description and Configure

You can delete any Step by opening the Properties Panel for the Step and clicking the red "Delete Step" button at the bottom.

Description Tab

This tab handles the details of the Step itself, such as the Step Name and Step Description.

Step Name

This field allows you to give the Step a custom name, which can help you differentiate between your Steps. It has a default value of "Outgoing Email" until manually changed.

Step Description

You can use this field to add a description to your Step.

Configure Tab

The Configure Tab contains all the fields you'll need in order to craft your email! It begins with some standard email fields which can be set either manually, or with the Formula Editor:

- To (recipient)
 - If you would like to enter multiple recipient email addresses, they must be separated by commas (,) or semicolons (;).
- BCC
- Sender Email
 - This is the email address who the recipient will receive the email from. You **cannot** enter multiple email addresses in this field.
- Sender Name
- Email Subject
- Send Email As HTML or as Plain Text

If you are not yet familiar with the Formula Editor, then [you can learn more about using the Formula Editor to create formulas here first.](#)

Please Note: The Formula Editor in the new Workflow Builder has some additional aliases when compared to the form-specific Editor. Namely, you can now select fields and aliases from all

previous forms when building your formulas. Selecting these previous forms' fields and aliases in the Formula Editor will create a "super-alias", an alias that works across multiple forms and steps. Super-aliases have the following format:

```
%%[workflow step #]![field alias]%%
```

Attach Form Response PDF(s)

You can also check the "Attach Form Response PDF(s)" checkbox in order to attach a PDF of any form response collected prior to this Step to the email. Checking this checkbox expands a list of options where you can choose which responses to send as PDFs and how they should be named. You can set the PDF names with either text or formulas, and can send one or multiple response PDFs. After checking the "Attach Form Response PDF(s)" box you will need to select at least one form to attach for this feature to work.

Email Content

This final text area allows you to add and customize the body of your email. You can style the text, add links and images, reference field aliases from any form above this step in the Workflow Builder Map, and reference workflow-specific aliases.

Assign a Form to a Different Respondent

If you would like to assign a form to another respondent, you'll need to set up an Email Step to contact them. This Step should send this new respondent an email and should contain the following alias:

```
%%LINK_TO_NEXT_STEP%%
```

Finally, the next respondent-facing Step must be a Form Step. When the second respondent receives this email, it will contain a link which they can click in order to continue the workflow from the next Step after the Email Step.

Feedback

FormAssembly Workflow Feedback

Please use this form to submit feedback regarding your experience with FormAssembly Workflow or submit a Workflow feature or improvement request.

First Name

Last Name

FormAssembly Username or Email Address *

How are you currently using Workflow?

What type of request would you like to submit? *

- Workflow Feature or Improvement Request
- Report Feedback or an Issue with Workflow

Workflow Feedback or Issue

Feedback Topic

Other Topic

Upload an Image or Screenshot

 No file selected