# Autoresponders

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Autoresponders are automated workflows in SendPad that you can set up to let the system perform repetitive tasks. For example, whenever a customer submits a certain form on your site, you want to send them a confirmation email.

Autoresponders are a combination of triggers and actions i.e., your pre-defined workflow needs a **"trigger"** to be initiated, and when it's triggered it will perform an **"action"** as per configuration.

 **Trigger =>** A form is submitted (by a customer)
 **Action =>** Confirmation email will be sent to the customer (by SendPad Autoresponder)

# Creating a new autoresponder

To create an autoresponder, follow the steps.

1. Open the **Autoreponders** page by clicking the **“Autoresponders”** option in the left menu.

2. Click the **“New Autoresponder”** button given in the top right corner of the Autoresponders page.

3. Enter a meaningful name for your autoresponder on the **“Create New Autoresponder”** popup.

4. Click **Create.**

5. The new autoresponder will be created and its page will open where you can add triggers and actions. Click on the **“+ Add Trigger”** box to add a trigger. The following triggers will appear in the left panel.

    - Subscribes to a list
    - Submits a form
    - Tag a contact
    - Untag a contact

6. Click on the trigger name to select it.

7. The selected trigger will be added on the right section of the page. For example, **“Subscribes to a List”** is added in the image shared below. Now, further, select the specific list or segment by clicking the plus **“+”** symbol. From the dropdown menu, select the desired list/segment.

8. The selected list/segment will be added to the trigger box in the right section of the page. For example, the **“Small Animal Owners”** segment is selected and thus added in the trigger box **“Subscribes to a List”.** It means that now whenever a contact is added/subscribed to the segment **“Small Animal Owners”**, this

autoresponder will be initiated. To add another list/segment, click the plus **“+”** sign again and select your desired list/segment from the dropdown.

In the image shared below, both, a list and a segment are added to the trigger box for the trigger **“Subscribes to a List.”**

9. When you are done defining the **“trigger”,** click on the plus **“+”** circle below the trigger to add an action for the selected trigger. The following actions will appear in the left panel:

   - Send Message
   - Subscribe to a List
   - Unsubscribe from a List
   - Wait

10. Choose the desired action that you want to be performed when the workflow is triggered. The selected action will be added to the workflow in the section of the page.  For example, upon selecting **“Send Message”**, Email is added to the workflow in the image shared below.

11. Now, configure your selected action properties. For example, in the image shared below, the email is set to **“Active”** by the toggle, and its subject, preheader, and content are defined.

12. Save your action by clicking the **Save Step** button.

 Similarly, you can add more actions/steps to your workflow. Please note that the steps will be performed in the sequence you add them.

13. Next, you need to save your autoresponder as explained below.

14. Activate your newly created/saved autoresponder as explained below.

Removing a step or trigger
To remove a step/action from your autoresponder, select that action > click the bin icon > and click Delete on the Delete Action popup.

Similarly, if you want to remove a trigger to add another trigger option, **select the trigger** you want to remove **>** click the **bin icon** **>** click the **Delete** button on the **Delete Trigger** popup.

Saving an Autoresponder
Once you have defined your autoresponder by adding the desired triggers and action steps, you must save it. To do so, click on the **“Save Automation”** button given in the top right corner of the page.

Saving an autoresponder is just to save your automated workflow. To enable the autoresponder to work, you need to activate it.

Once you save your autoresponder, you will be redirected to the main **Autoresponders** page where your newly saved autoresponder will be listed on the top of the page.

Activating an Autoresponder
Activating an autoresponder refers to the active state of your workflow i.e., it will only run when it has the status **“Active.”** An inactive autoresponder is like a draft that is not published. So, if you want the system to run the workflow steps automatically, you need to

activate that workflow. To do so, follow these steps:

You can either click on the **ellipsis (three dots)** against the workflow name on the main **Autoresponders** page and click the **"Activate autoresponder"** option in the dropdown menu.

**OR**

You can select the **“View”** option from the dropdown menu and go to the workflow page where you added triggers and action steps. Here, you can make any necessary changes and then slide the toggle **“Inactive”** to the right. It will be changed to **“Active.”** However, in this case, you need to click the **Save Automation** button after switching on the toggle. It will save the active state of your workflow.

Either way, the status of your autoresponder will be updated to **“Active.”** Now, whenever the trigger conditions are met, the workflow will automatically start and perform the next steps as per the configuration.

Adding multiple triggers

You can add a maximum of two triggers to a workflow for it to initiate. For example, two different cases follow the same course of actions, such as you want the same email to be sent in the following cases:

- When the customers are added/subscribed to a specific list.
- When a contact in your system is tagged with a specific label (tag).

Please refer to the image shared below for a demonstration of this example.

### Deactivating an Autoresponder

If you no longer want an autoresponder, you can simply deactivate it on the main **“Autoresponders”** page. Click on the **ellipsis (three dots)** against the workflow name and click the **“Deactivate autoresponder”** option in the dropdown menu.

A notification of success will appear on the top right corner of the page. The status of the autoresponder will be updated to **“Inactive.”**

# Triggers

You can automate your workflow for the following available triggers in SendPad.

- Subscribes to a List
- Submits a Form
- Tag a Contact
- Untag a Contact

>  A trigger in your workflow/autoresponder answers **“when**” the workflow should be initiated.
>  An action is your workflow/autoresponder answers **“what”** should be performed.

### Subscribes to a List

The **“Subscribes to a List”** trigger if added to your autoresponder will initiate the autoresponder when a contact subscribes to the selected list or a segment. You specify the list or a segment to which if a contact is subscribed/added, the workflow should run.

- Multiple lists can be selected at a time.
- Multiple segments can be selected at a time.
- Multiple lists and segments can be selected at a time.

So, if a contact is subscribed to any of the selected lists or segments, the autoresponder will be initiated for this trigger.

### Submits a Form

The **“Submit a Form”** trigger will initiate the autoresponder when a user submits the selected form. You can select multiple forms under one trigger.

**Example:**

There are two forms on your site:

- Send a message to support
- Inquiry for product stock

**=>** You want to send the same confirmation email to the users who submit any of the above-listed forms.

You can select both of these forms for the trigger **“Submits a Form”.**

So, now if the user submits any of the selected forms, the autoresponder will be initiated.

### Tag a Contact

Use this trigger if you want to automate the steps that are performed after a contact is tagged with a specific label. For example, you want to send a couple of emails with a gap of a few days to the contacts who are new to your platform. In such a case, you will first create a tag, let’s say, **“New Subscriber**” and then add that tag to the new contact. As soon as you tag the contact, the workflow will be initiated to carry out the rest of the steps/action items such as sending a welcome email.

 You can configure your autoresponder to be triggered for multiple tags. Selecting multiple tags under one trigger is handy when the same actions are performed for different tags. So, rather than creating the same workflow for different tags, you create the workflow once and select all the desired tags under the trigger.

### Untag a Contact

Just like tagging a contact, if you want to automate the steps that are performed when a specific tag is removed from a contact, you will use the trigger **“Untag a Contact.”**

# Actions

▯ A trigger in your workflow/autoresponder answers **“when”** the workflow should be initiated.

▯ An action is your workflow/autoresponder answers **“what”** should be performed.

The following actions are available in SendPad for you to define your workflow.

- Send Message
- Unsubscribe from List
- Subscribe to List
- Wait

### Send Message

Add this action to your workflow to send an email in your workflow. For example, when a user submits a form, you want to send them a confirmation message.

Once you add the **“Send Message”** action to your workflow, the next steps are the same as setting up a broadcast. [Learn more about  a broadcast setup](#).

▯ Once done finalizing your email, switch the **“inactive”** toggle to the right so it becomes **“active”.** Click **“Save Step.”**

> ▯All emails undergo the admin review and will only be sent (regardless of their active or inactive state) once the admin approves the email. The review process will typically take 24-48 hours. You can activate the emails, and once these are approved, these emails will start sending as per the workflow, provided that the autoresponder is activated.

### Unsubscribe from List

If you want to remove a contact from a specific list or a segment during your automated workflow, then you can add this action step to the workflow. For example, if a person subscribes to your newsletter by submitting a form, then you want that user to be removed from a list named **“standard”** in your system.

Subscribe to List

If you want to add a contact from a specific list or a segment during your automated workflow, then you can add this action step to the workflow. For example, if a person subscribes to your newsletter by submitting a form, then you want that user to be added to a list named **“Newsletter Subscribers”** in your system.

Wait

If you want to add a time gap or a delay before performing a step in the workflow, add **“Wait”** before it. For example, if a person subscribes to your newsletter, you don’t want to send a confirmation email immediately, you want it to be sent after 5 minutes instead, then you will add a wait of 5 minutes.

Adding **“wait”** is a way of scheduling your steps in the autoresponder.  Otherwise, these steps would be performed one after the other in a sequence. Hence, you can automate and schedule your entire email campaign by adding **“wait”** to your autoresponder.

You can add wait for the following durations:

- Minutes
- Hours
- Days

> At the **“Days”** level, you can also specify the exact time of a specific day. For example, you added a delay of 5 days before sending an email. But, you don’t want to count the weekends, so you can select only the weekdays, and you can also select the time at which you want to send the email (automatically). That is more like scheduling your email within an autoresponder or scheduling other action items in your workflow.

**Example:**

In the sample image shared below, before performing the next step, the autoresponder will wait for 5 days, and after 5 days, it will check what day it is, and then it will check what time it is. If it’s one of the weekdays, then it will wait until 11:45 AM before performing the next step in the workflow.

# Autoresponder Status

| # | Autoresponder Status | Description |
|---|---|---|
| 1 | Draft | An autoresponder is created but not saved by clicking the button **“Save Automation”.** |
| 2 | Inactive | An autoresponder is created and saved successfully, but not activated. |
| 3 | Active | An autoresponder is active and will be triggered instantly if the conditions that trigger it are met. |