

Send automated email via a workflow whenever a prospect submits an inquiry form

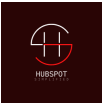


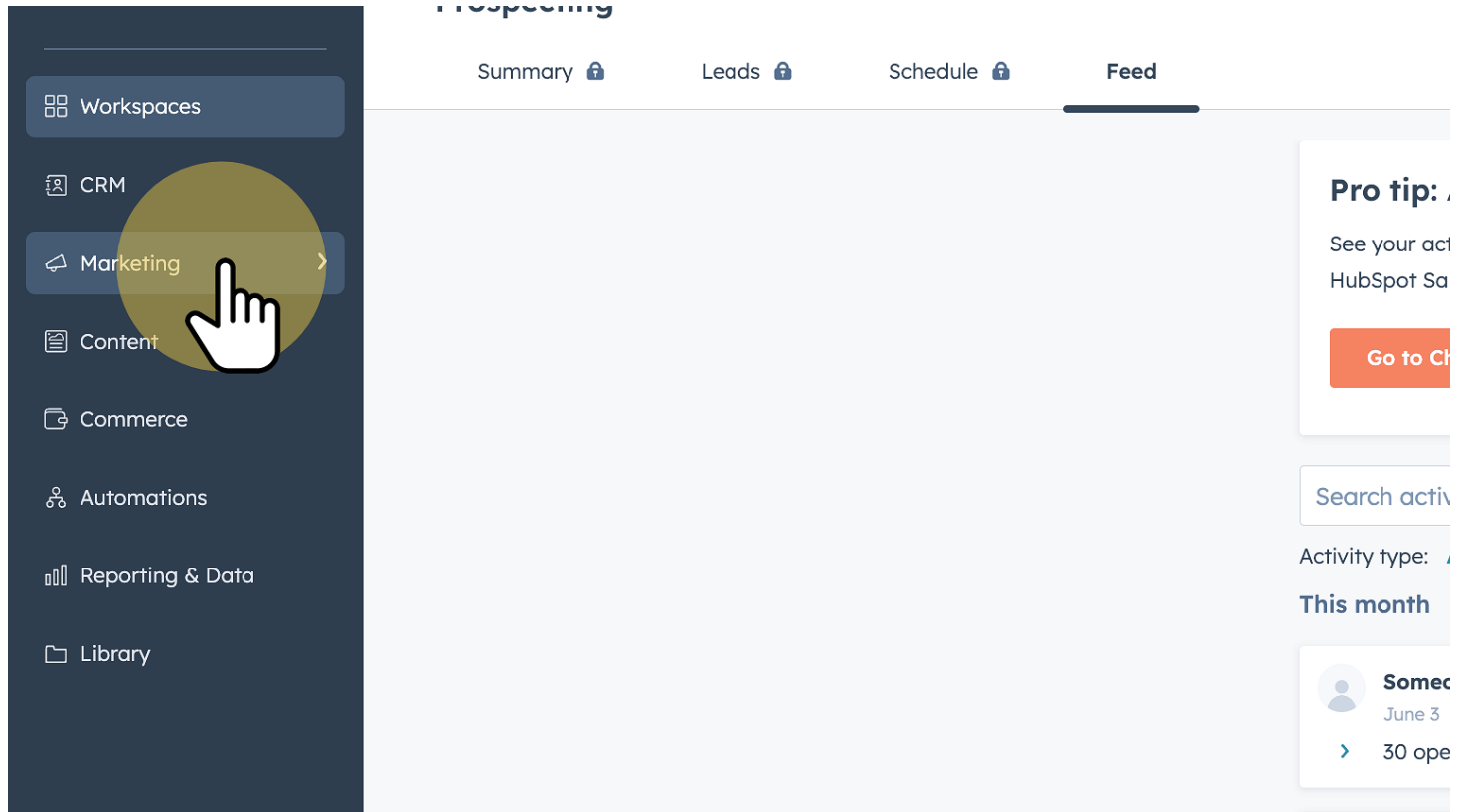
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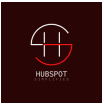
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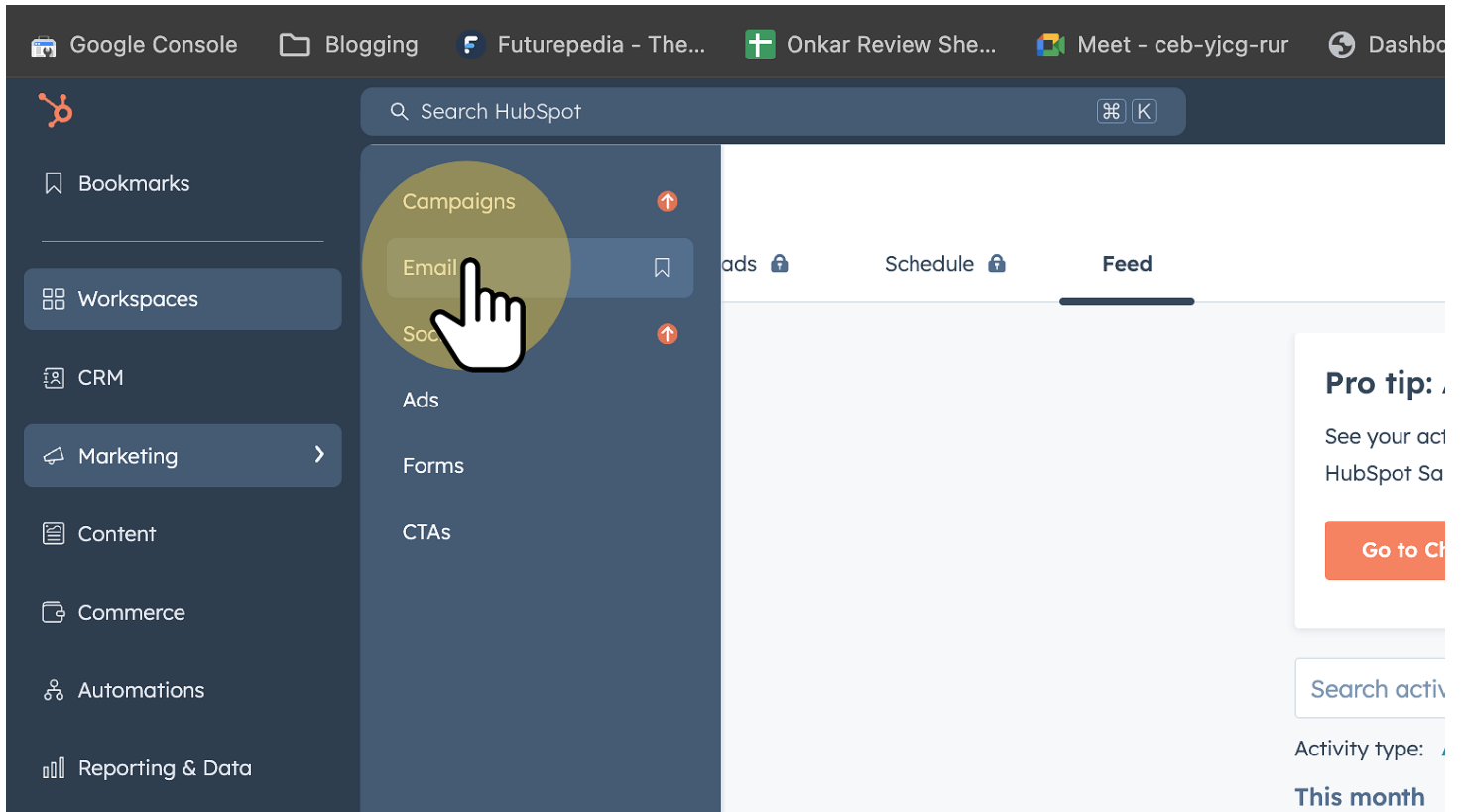
1 Click on 'Marketing'

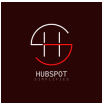
Let us first start by creating the email we want to send automatically after someone fills up the inquiry form





2 Click on 'Email'



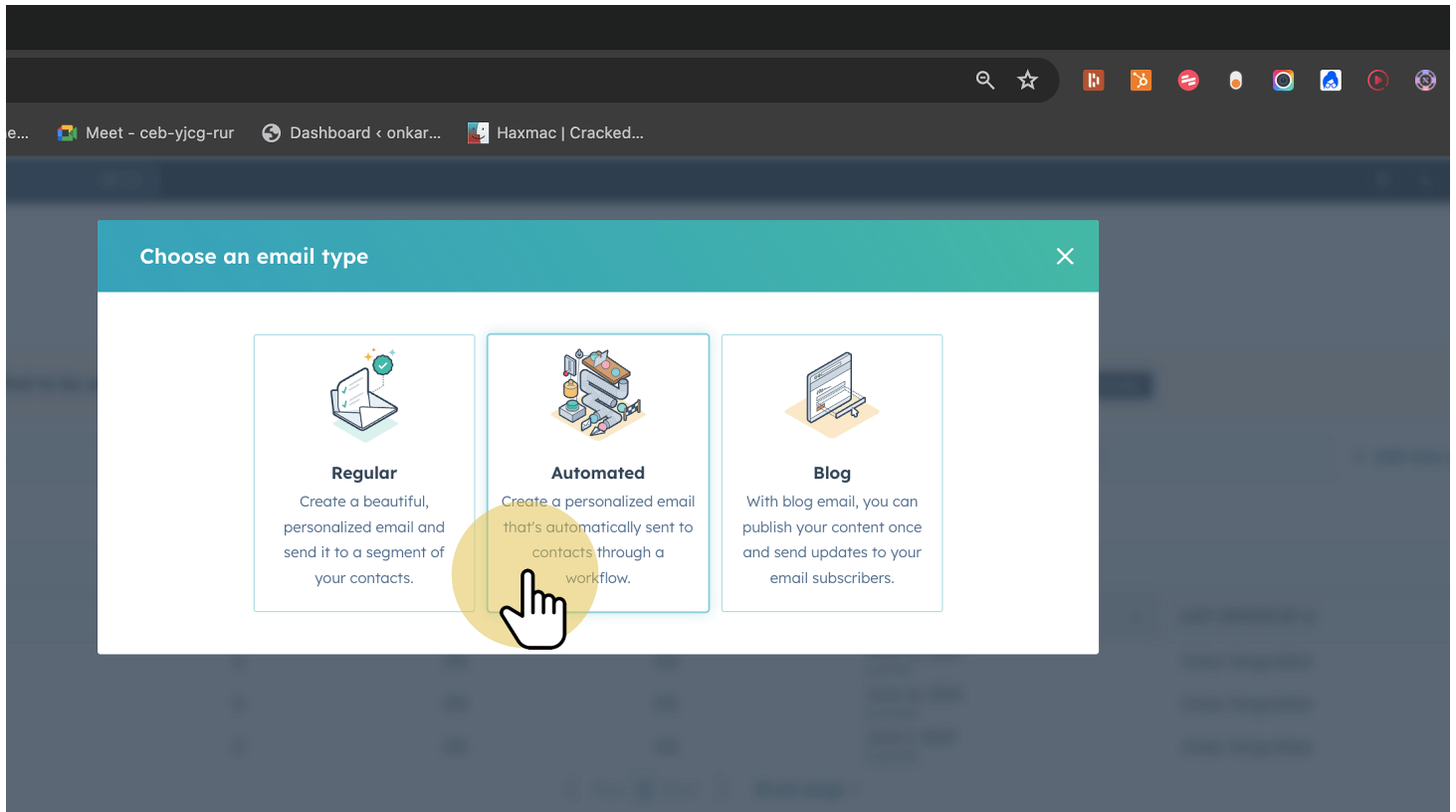


3 Click 'Create email'

The screenshot shows the HubSpot interface. At the top, there is a navigation bar with various icons and a search bar. Below the navigation bar, there is a header area with the text "Email tools" and a button labeled "Create email". A hand cursor is pointing to the "Create email" button, which is highlighted with a yellow circle. Below the header, there is a notification banner that says "See affected emails" with a "Learn more" link. Below the notification banner, there is a table with columns for "LAST UPDATED AT (GMT+5:30)", "LAST UPDATED BY", and "PUBLISH/SEND DATE (GMT+5:30)". The table is currently empty. To the right of the table, there are buttons for "Edit columns" and "Export emails".

4 Select the email type 'Automated'

This is an extremely important step. If you choose any other email type, you will not be able to send out automated emails.



5 Select the 'Thank you' template

You can either create an email from scratch or make use of the pre-made templates from HubSpot. We are going to make use of one such template.

Basic



Welcome

Send an email to your new customers to welcome them to your product.



Simple

Start with a simple template if you like to have or to begin with minimal formatting in your emails.



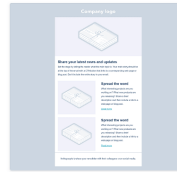
Promotion

Sell your products and services and promote your latest deals.



Plain Email

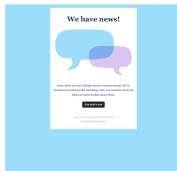
Create an email with little formatting that will look and feel like a personal email to your readers.



Newsletter

Keep your contacts engaged with your brand by sharing content that you both care about.

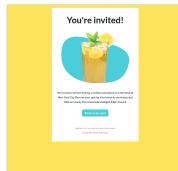
More



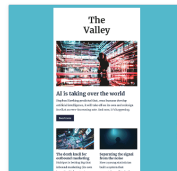
Announcement



E-Book



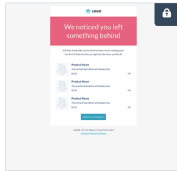
Event Invitation



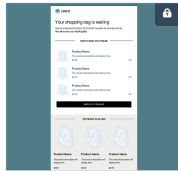
Newsletter 2



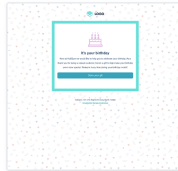
Thank You



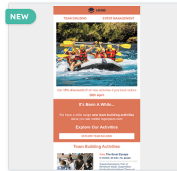
Abandoned Cart



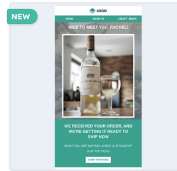
Abandoned Cart 2



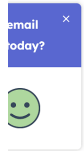
Birthday



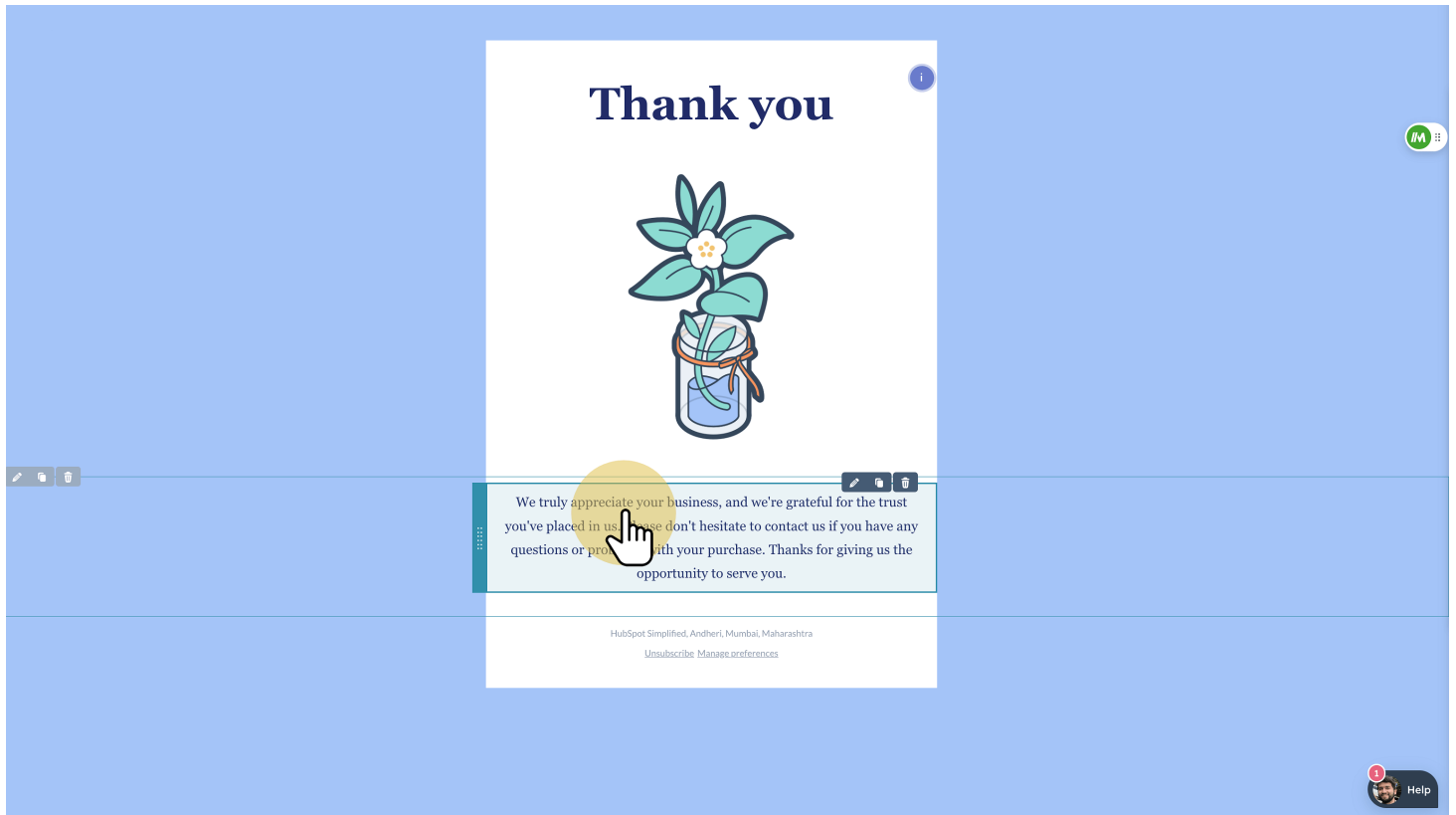
Commerce Re Engagement



Commerce Welcome



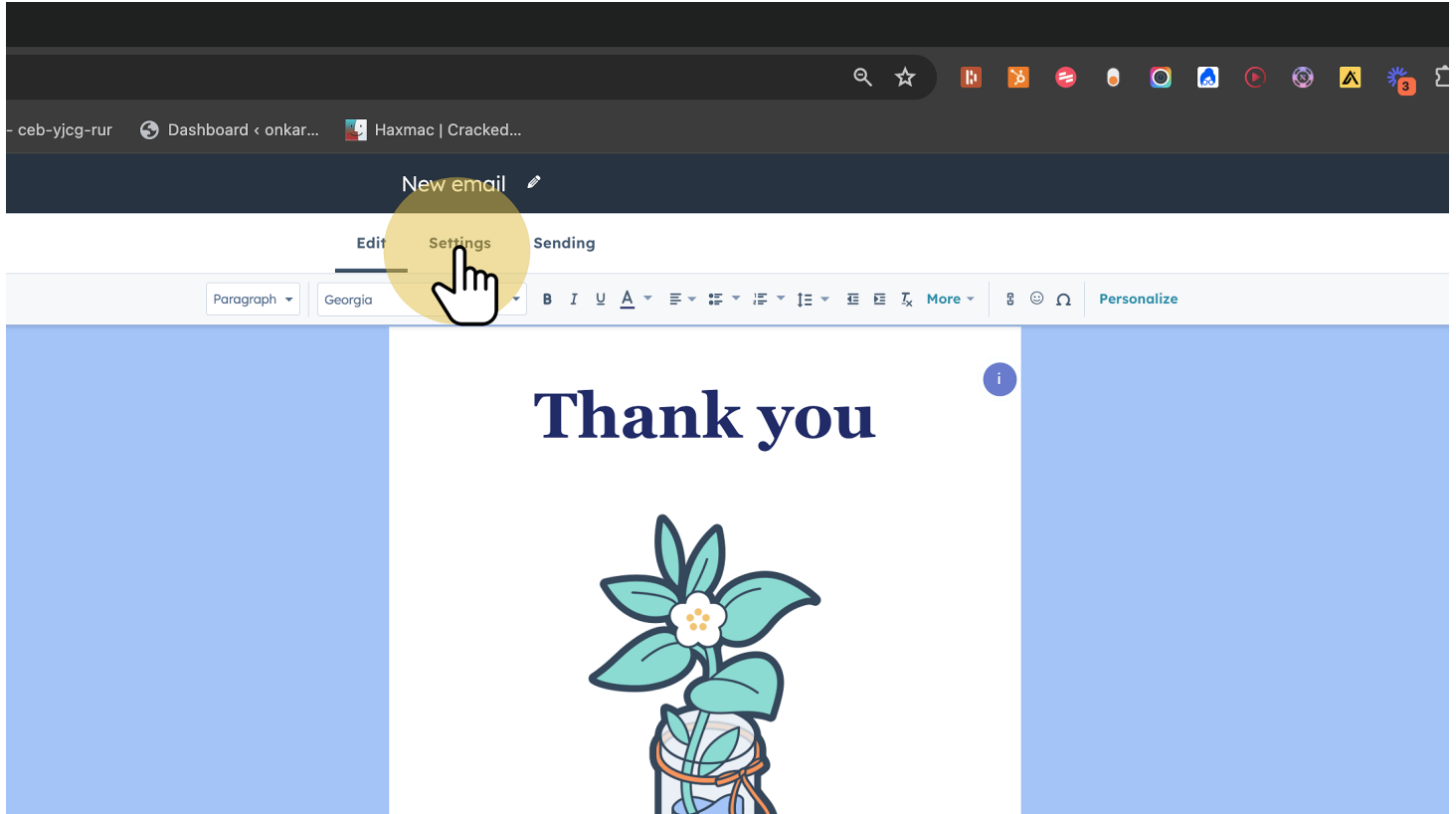
6 Edit the email content as per your needs

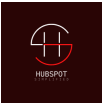


The screenshot displays the HubSpot email editor interface. The central focus is a white email template with a blue background. At the top, the text "Thank you" is written in a large, dark blue font. Below this is a colorful illustration of a plant with green leaves and a white flower, growing out of a glass jar filled with water. The text below the illustration reads: "We truly appreciate your business, and we're grateful for the trust you've placed in us. Please don't hesitate to contact us if you have any questions or problems with your purchase. Thanks for giving us the opportunity to serve you." At the bottom of the template, there is a small line of text: "HubSpot Simplified, Andheri, Mumbai, Maharashtra" followed by links for "Unsubscribe" and "Manage preferences". The editor interface includes various toolbars and icons for editing, such as a pencil, eraser, and trash can. A hand cursor is visible over the text area, indicating that the content is being edited. There are also floating help and chat icons on the right side of the editor.



7 Click on settings





8 Configure your emails

Here, you can configure the 'From Name', 'From address', the subject line and the preview text.



9 Personalize your email

You can personalize the subject line by adding the name of the contact, by clicking on the 'personalize' button and adding the name to it.

Email settings

From name *
Onkar Vengurlekar

From address *
onkar@onkarv.com
To improve deliverability, this address will be modified and sent from a HubSpot domain. To send from your chosen address, please connect your domain. If you've already done this, check back later.

Use this as my reply-to address
Make sure you're using a HubSpot connected inbox as your reply-to address to track replies

Subject line *
Thank you for your inquiry

Preview
Pe

Internal
Thanl

Language
Only def
Engli: Last name @ email name
pported languages

Subscri
Marketing information status source name

Office location
Footer module will be updated in email
HubSpot Simplified, Andheri, Mumbai, Maharashtra Edit

Plain text and web version

Insert Personalization Token

Type
Contact

nam

Company name

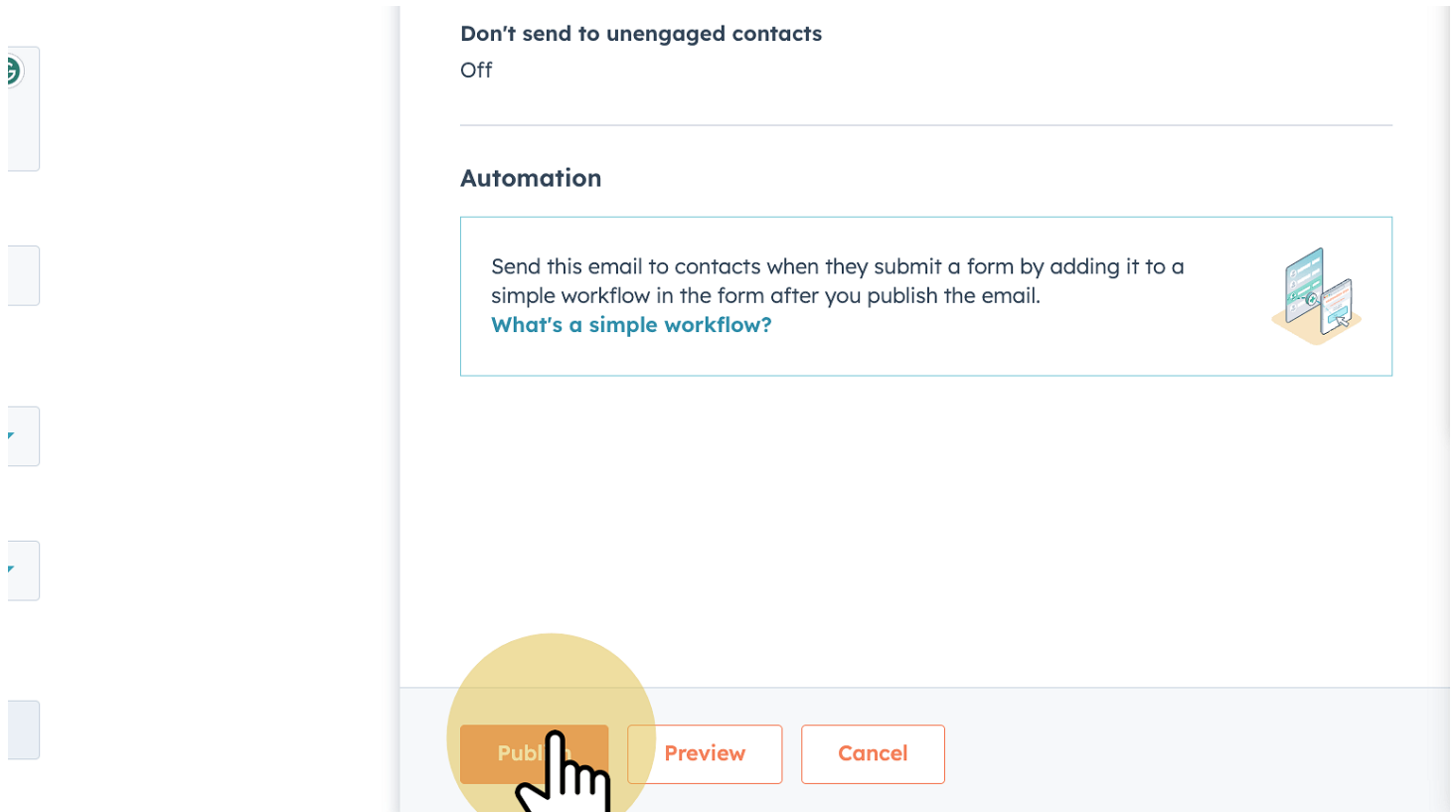
First conversion

First name

Last name

10 Review and Publish the email


Once the email is created and configured, review and publish the email



Don't send to unengaged contacts
Off

Automation

Send this email to contacts when they submit a form by adding it to a simple workflow in the form after you publish the email.
[What's a simple workflow?](#)

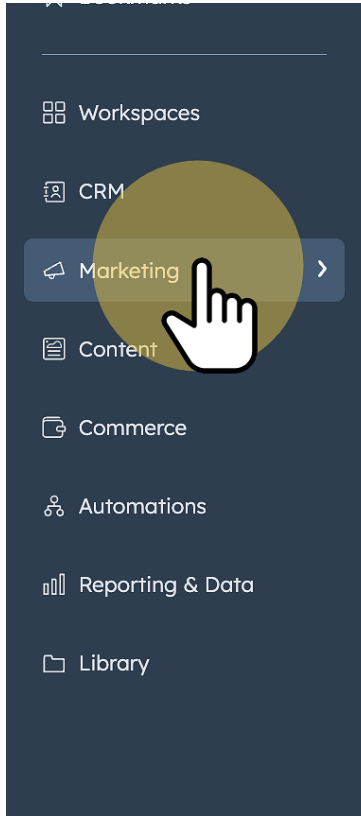


Publish **Preview** **Cancel**



11 Let us configure the forms automation

Select the marketing tab

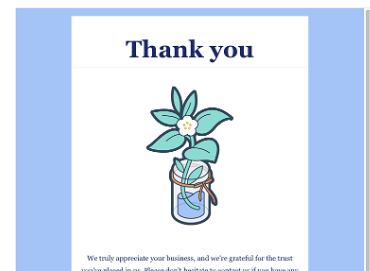


[Back to all emails](#)

Thank you for your inquiry {{

Published | Automated email

Time Range to



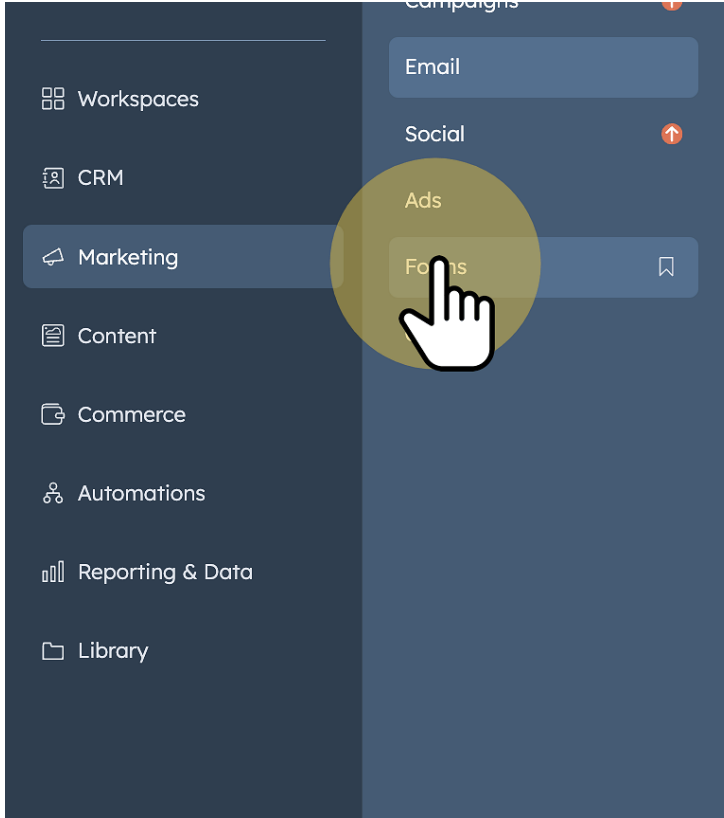
Subject: Thank
Update: June 1
[See details](#)

Performance

Recipients



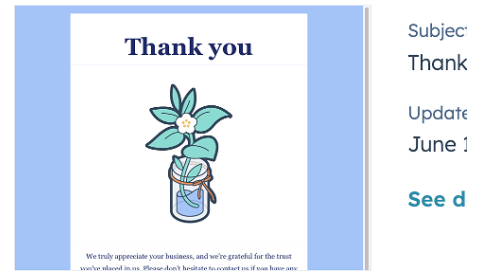
12 Go to Firms



Thank you for your inquiry {{

● Published | Automated email

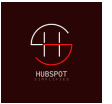
Time Range to



Subject: Thank
Update: June 1
[See d](#)

Performance

Recipients



13 Select the Inquiry form you want to add the automation to

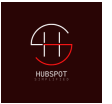
Automations

Reporting & Data

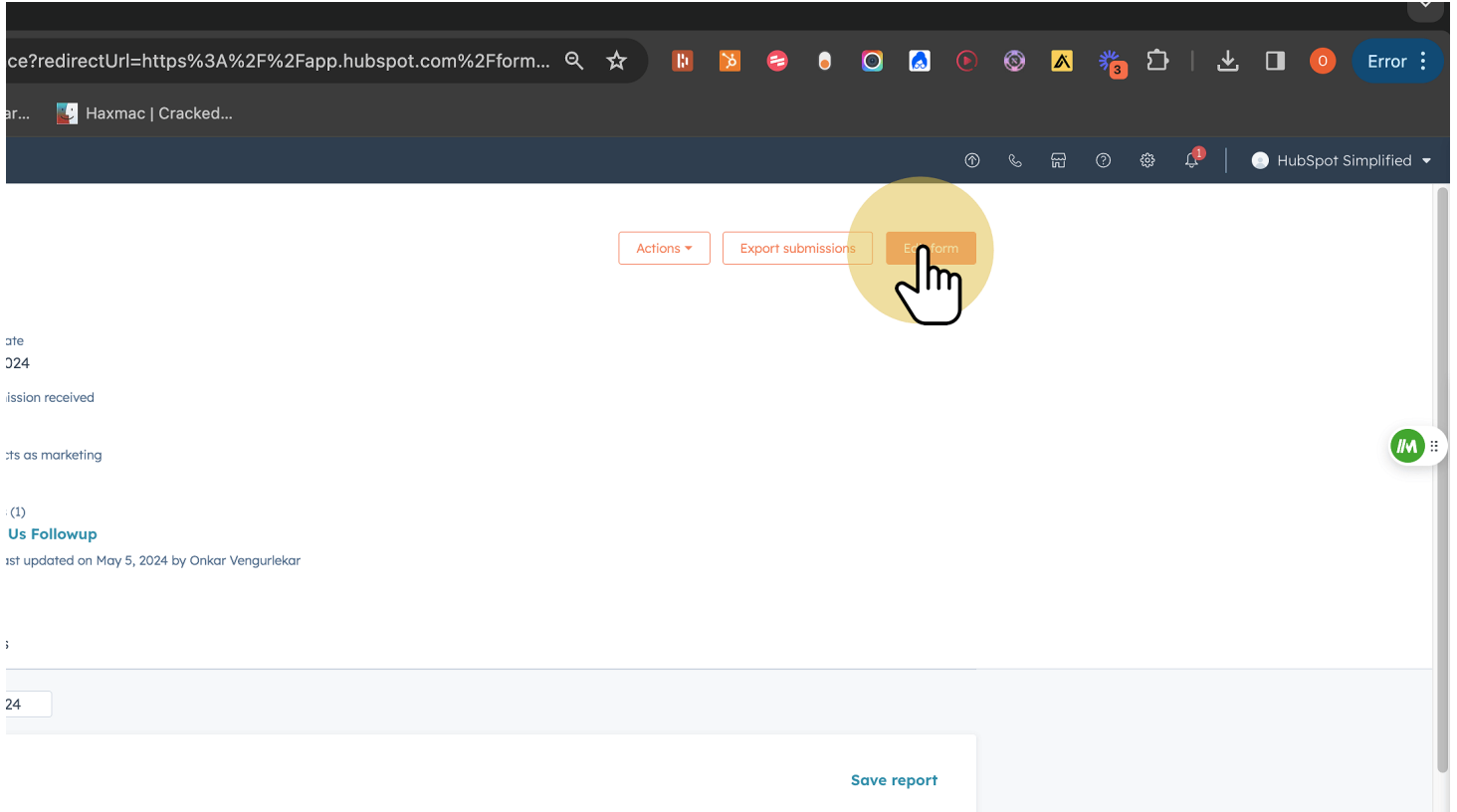
Library

<input type="checkbox"/>	Published Regular form	0	0%	0
<input type="checkbox"/>	Download tutorial for creating workflow to send interna... Published Regular form	0	0%	0
<input type="checkbox"/>	Download tutorial for creating workflow to set bounced ... Published Regular form	1	100%	0
<input type="checkbox"/>	Newsletter Published Regular form	3	0%	0
<input type="checkbox"/>	Contact Us Published Regular form Edit Clone Actions ▾	3	0%	0

[Prev](#)

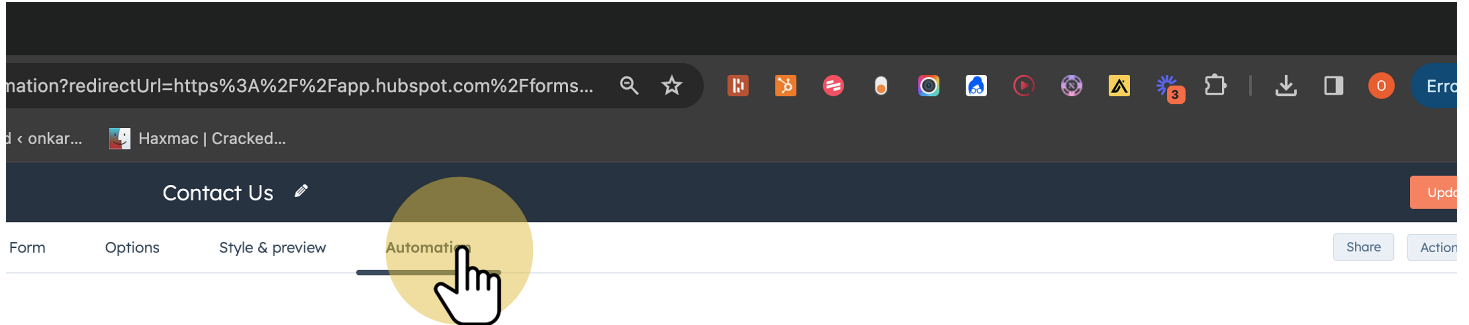


14 Click on 'Edit Form'





15 Click on 'Automation'



After a form is submitted

Configure follow-ups after contacts engage with your form. For example, sending them a follow-up email.



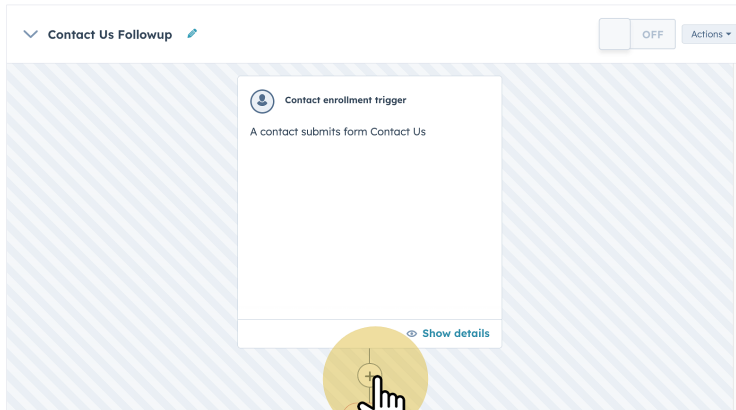
Learn more about workflows? Get extra actions, triggers, and if/then branching in the [workflows tool](#).

16 Click on the '+' icon

Automate what happens after a form is submitted

Use simple workflows to take care of your follow-ups after contacts engage with your form. For example, sending them a follow-up email. [What's a simple workflow?](#)

+ Add a new simple workflow



▼ Contact Us Followup OFF Actions

Contact enrollment trigger
A contact submits form Contact Us

Show details

Need more powerful workflows? Get extra actions, triggers, and if/then branching in the [workflows tool](#)



17 Click on 'Communications'



Delay

Create a delay between actions

HubSpot



Communications

Send emails and notifications to your customers and te...



CRM

Create and update CRM records and property values



Marketing

Manage records and statuses for your lists and audienc...



Unlock more actions

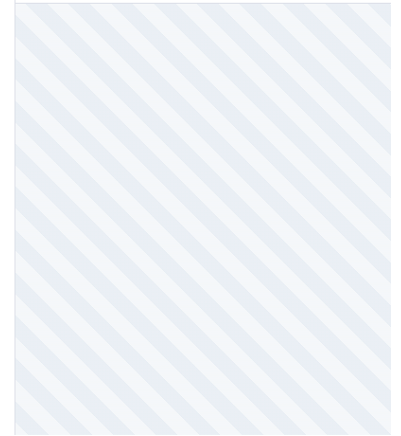


Including if/then branching, property management actions, automatic deal creation, and more.

Automate what happens


Use simple workflows to take care of y
example, sending them a follow-up en

▼ Contact Us Followup








18 Select 'Send email'


 **Delay**
Create a delay between actions


HubSpot



✓  **Communications**

 **Send email**
Send an email to the contact

 **Send internal email notification**
Send an email to any of your team members

>  **CRM**
Create and update CRM records and property values

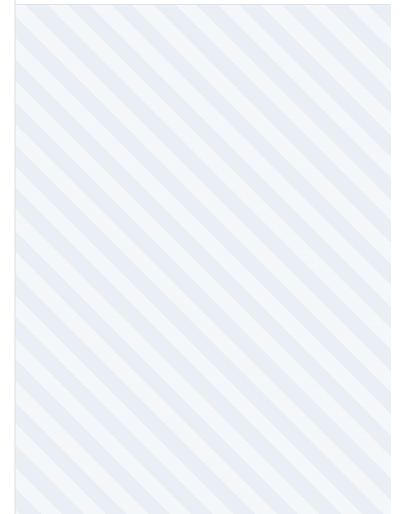
>  **Marketing**
Manage records and statuses for your lists and audienc...

 **Unlock more actions** 
Including if/then branching, property management actions

Automate what happens

Use simple workflows to take care of, for example, sending them a follow-up email.

▼ Contact Us Followup





19 Choose the email you created from the 'Automated Email' dropdown

< 1. Send email Cancel Save


Only marketing contacts can receive this email. If you haven't done it yet, [learn how to set contacts as marketing](#) ↗

Send to

- Enrolled contact
- Associated contact

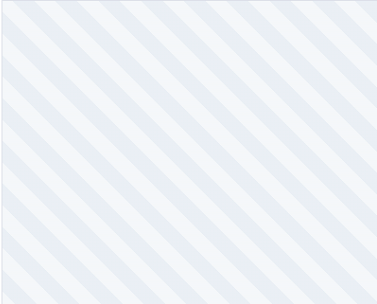
Automated email
Only emails saved for automation will appear here. [Why?](#) ↗

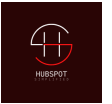
Thank you for your inquiry {{ personalizatio... ▼



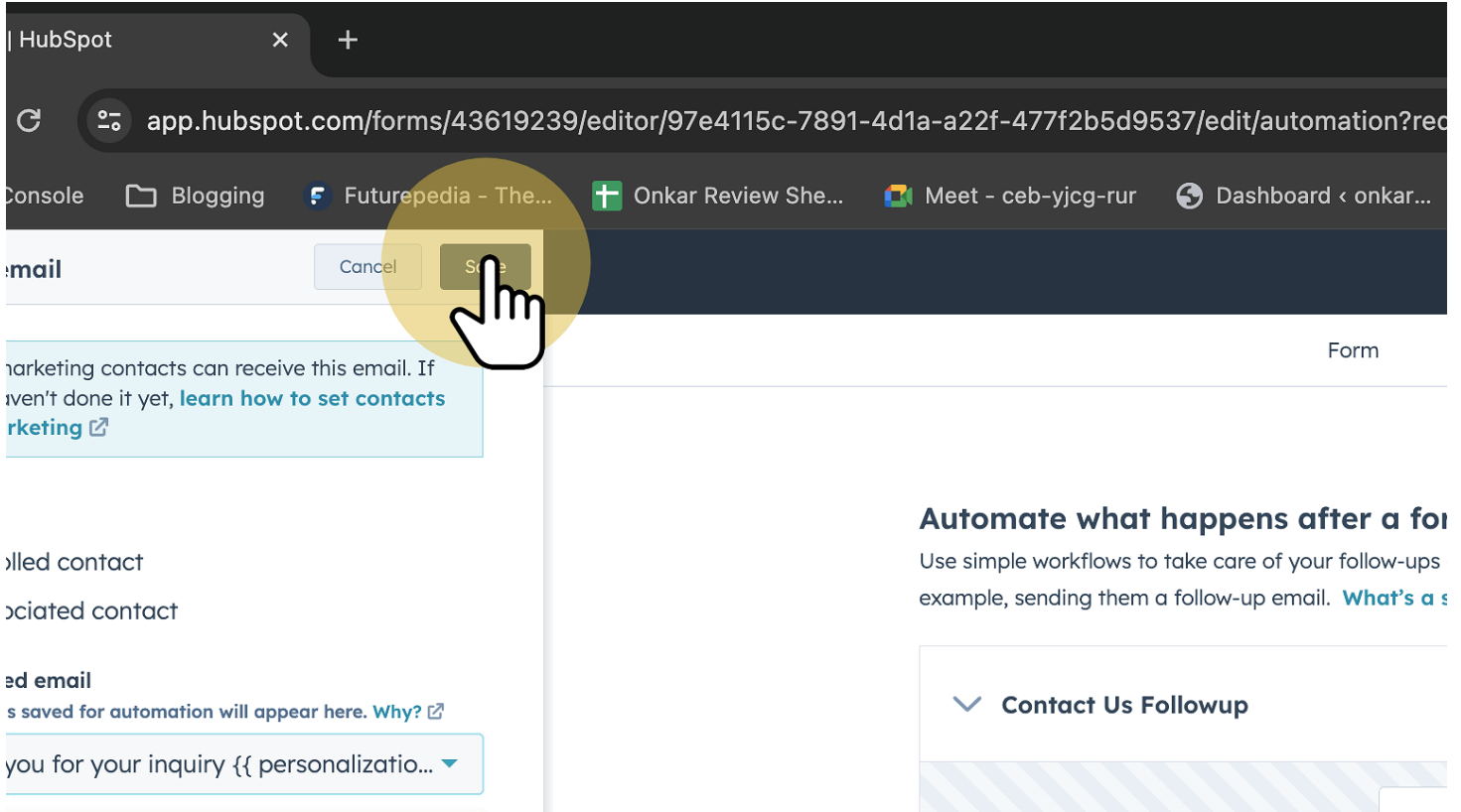
Automate what happens
Use simple workflows to take care of, for example, sending them a follow-up en

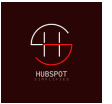
▼ **Contact Us Followup**





20 Click on 'Save'

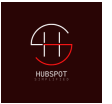




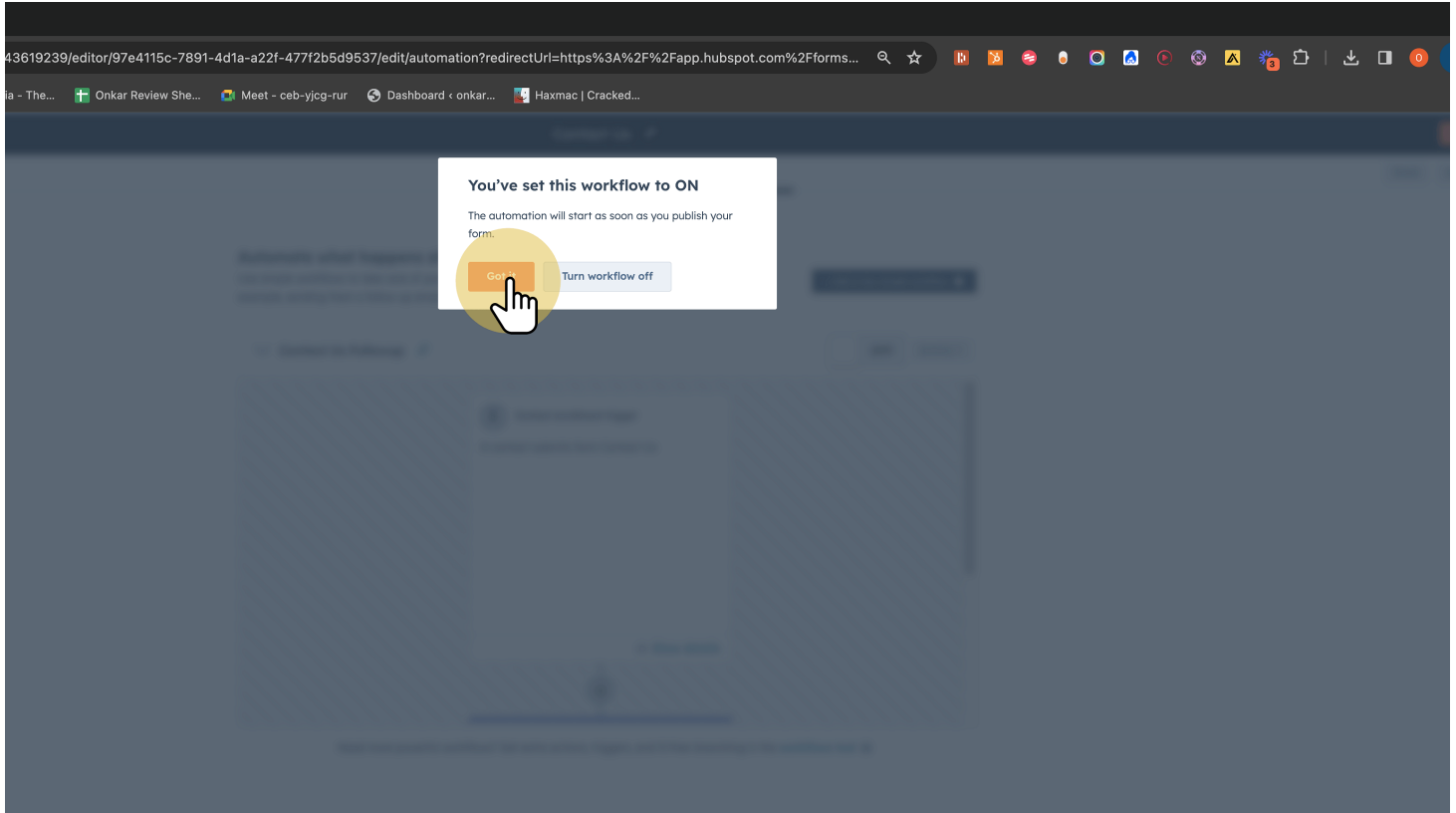
21 Turn 'ON' the automation

The screenshot shows the HubSpot automation editor interface. At the top, there's a navigation bar with 'Form', 'Options', 'Style & preview', and 'Automation' tabs. The 'Automation' tab is active. Below the navigation bar, there's a header section titled 'Automate what happens after a form is submitted' with a sub-header 'Contact Us Followup'. A yellow callout bubble with a hand icon points to a toggle switch labeled 'OFF' in the top right corner of the workflow editor. The workflow itself consists of a single step: 'Contact enrollment trigger' with the description 'A contact submits form Contact Us'. Below the workflow, there's a '+ Show details' link and a '+ Add a new simple workflow' button. At the bottom of the workflow editor, there's a note: 'Need more powerful workflows? Get extra actions, triggers, and if/then branching in the workflows tool'.





22 Confirm setting the workflow 'ON'



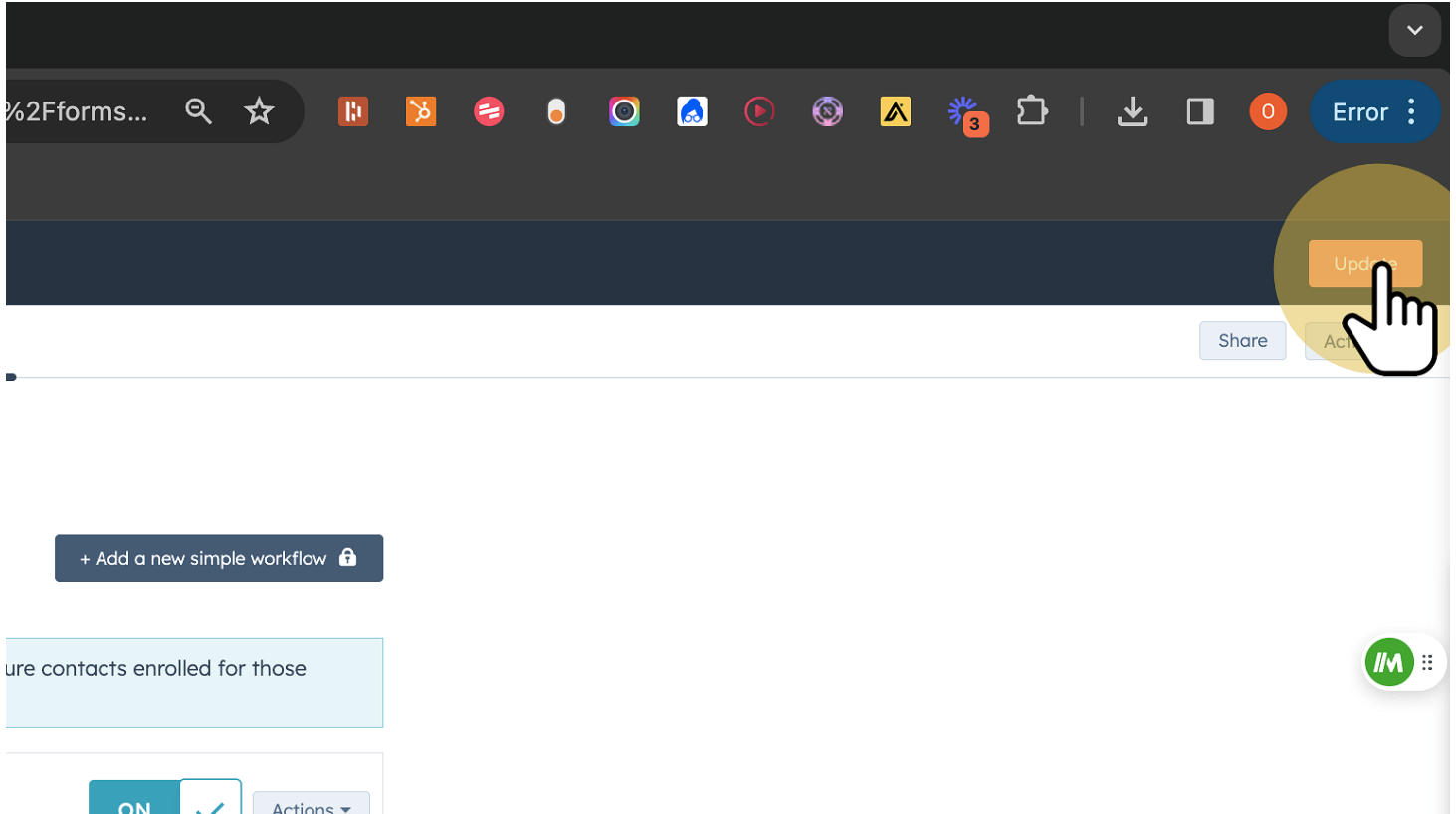


23 Your form automation workflow is now active!

The screenshot shows the HubSpot Automation interface for a form named "Contact Us". The top navigation bar includes "Form", "Options", "Style & preview", and "Automation" (which is selected). There are "Share" and "Actions" buttons on the right. The main content area is titled "Automate what happens after a form is submitted" and includes a sub-header "Contact Us Followup" with a status of "ON". A single workflow step is visible: "Contact enrollment trigger" with the description "A contact submits form Contact Us". Below the step is a "Show details" link and a plus sign icon to add more steps. A note at the bottom of the workflow area reads: "Need more powerful workflows? Get extra actions, triggers, and if/then branching in the workflows tool".

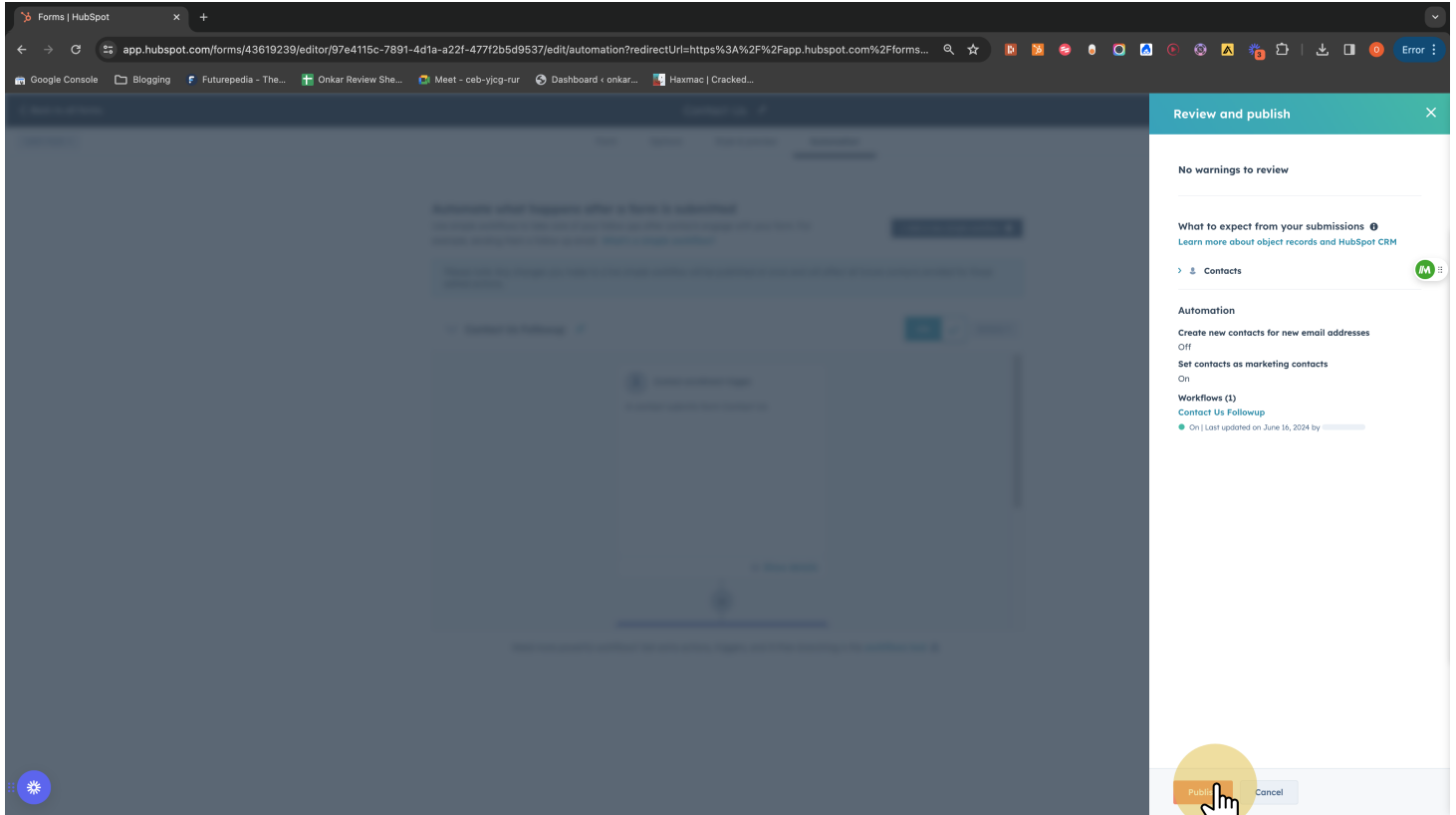


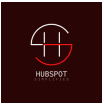
24 Click on 'Update' to update the form changes





25 Publish the form





26 The form automation changes are now live!

