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

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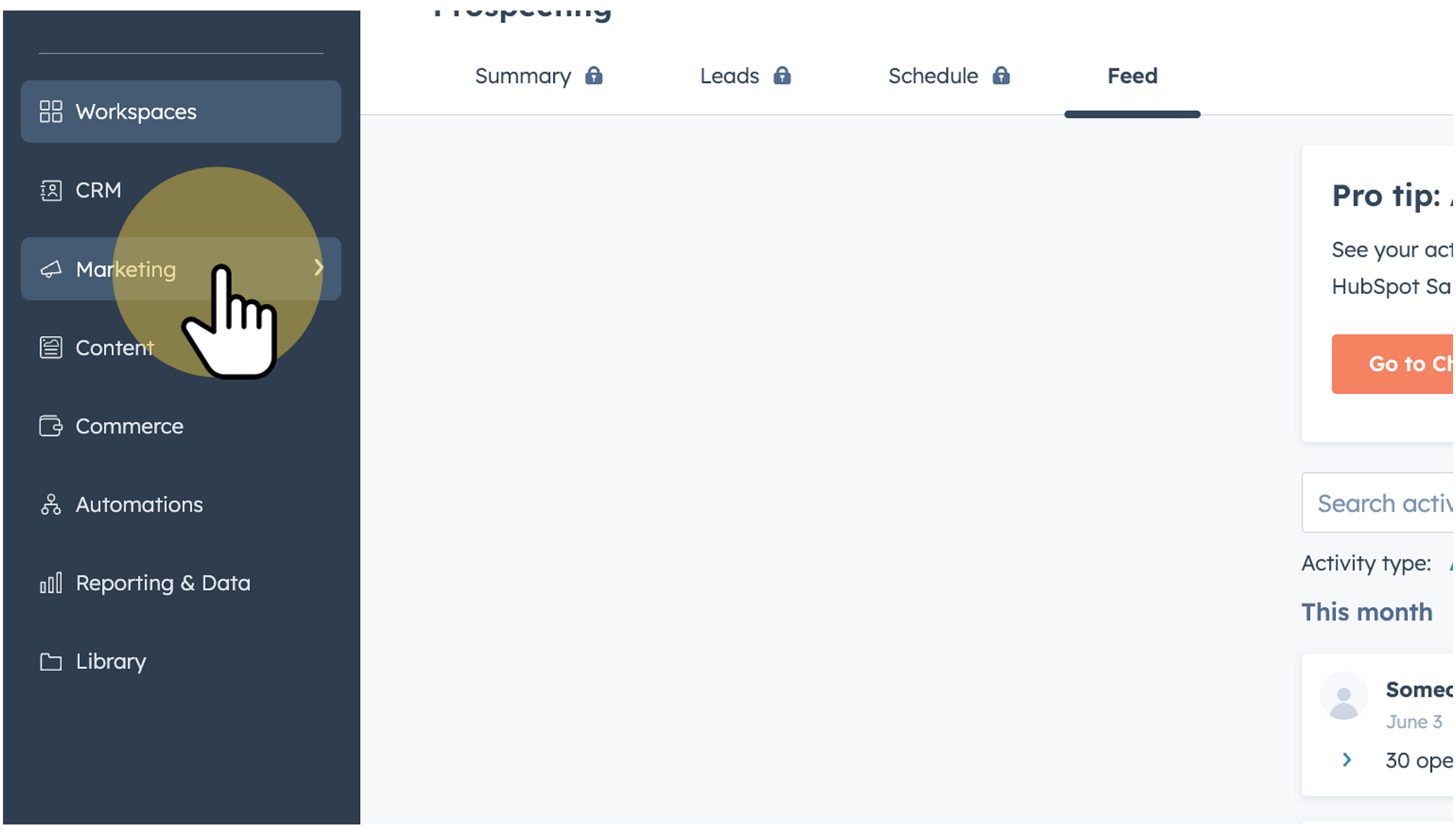
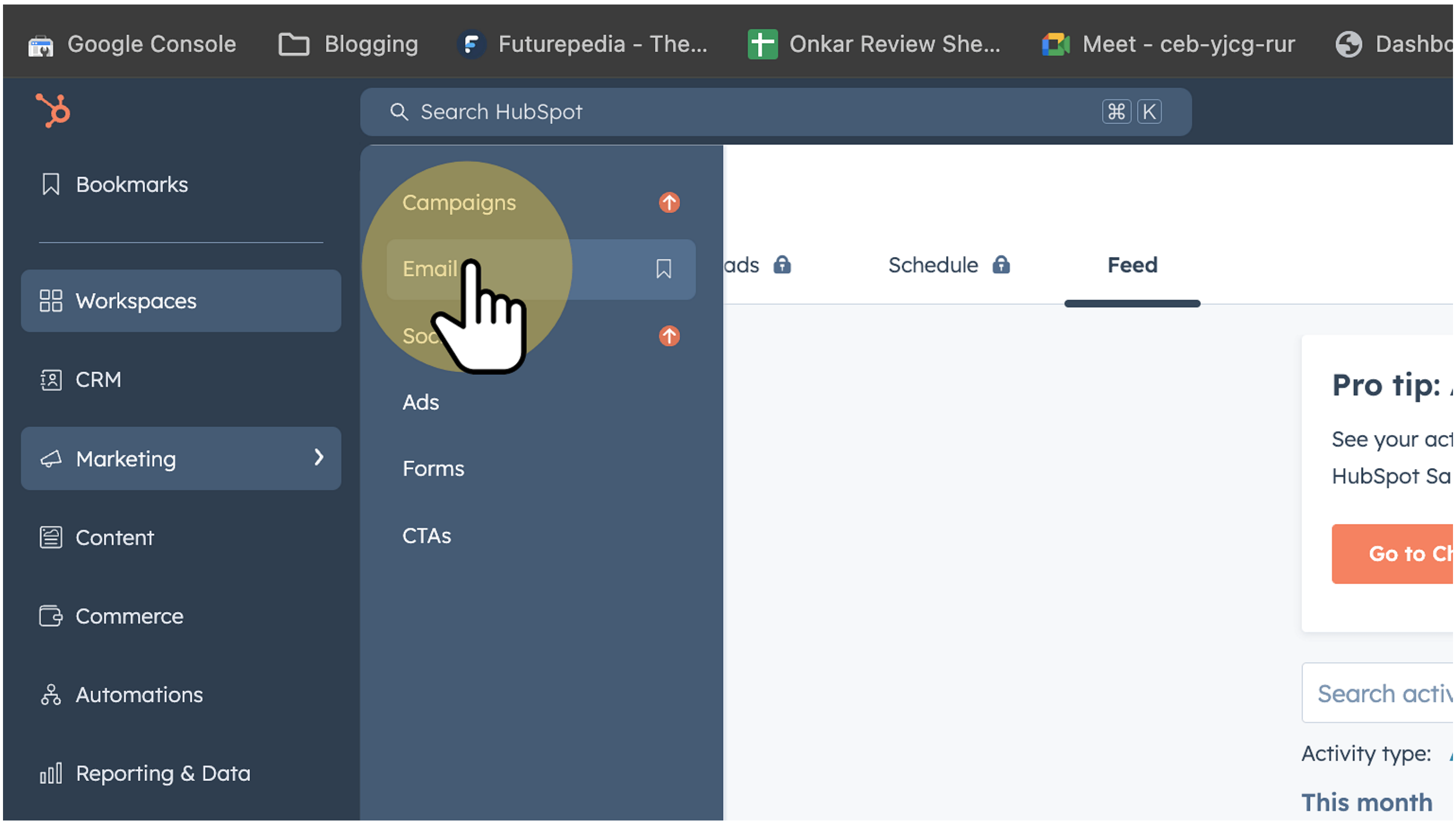
1 Click on 'Marketing'

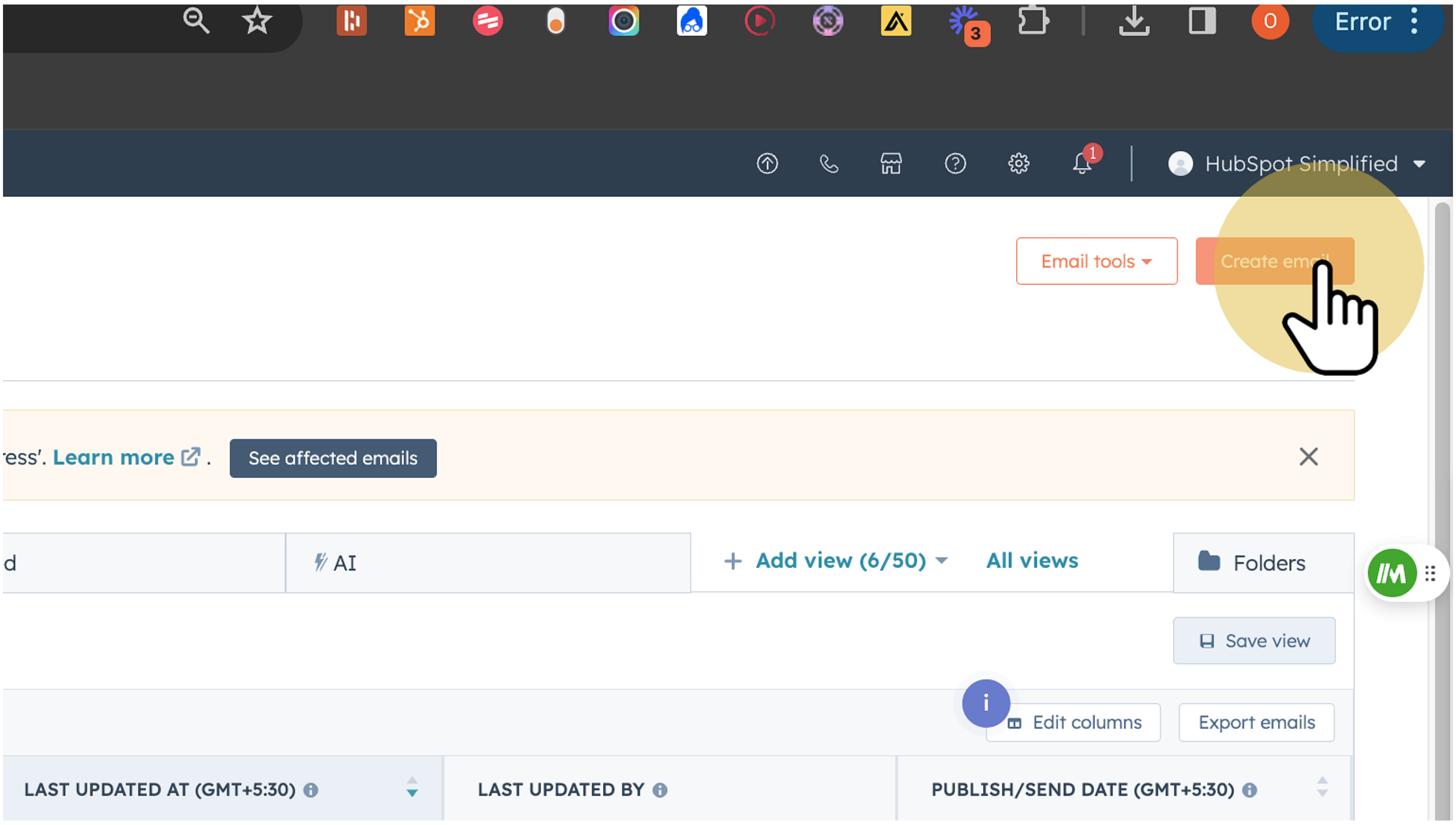
Let us first start by creating the email we want to send automatically after someone fills up the inquiry form



2 Click on 'Email'

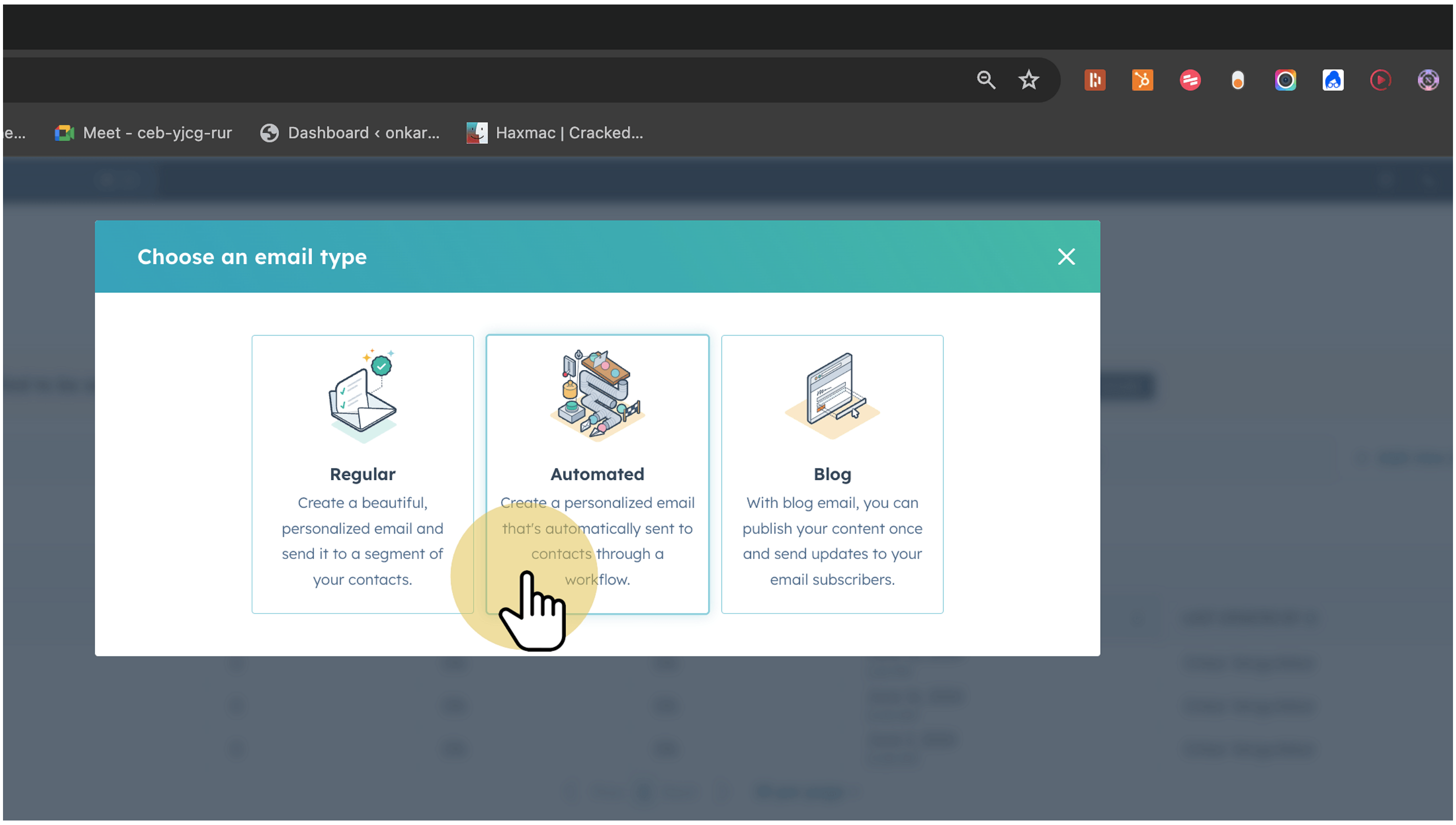


3 Click 'Create email'



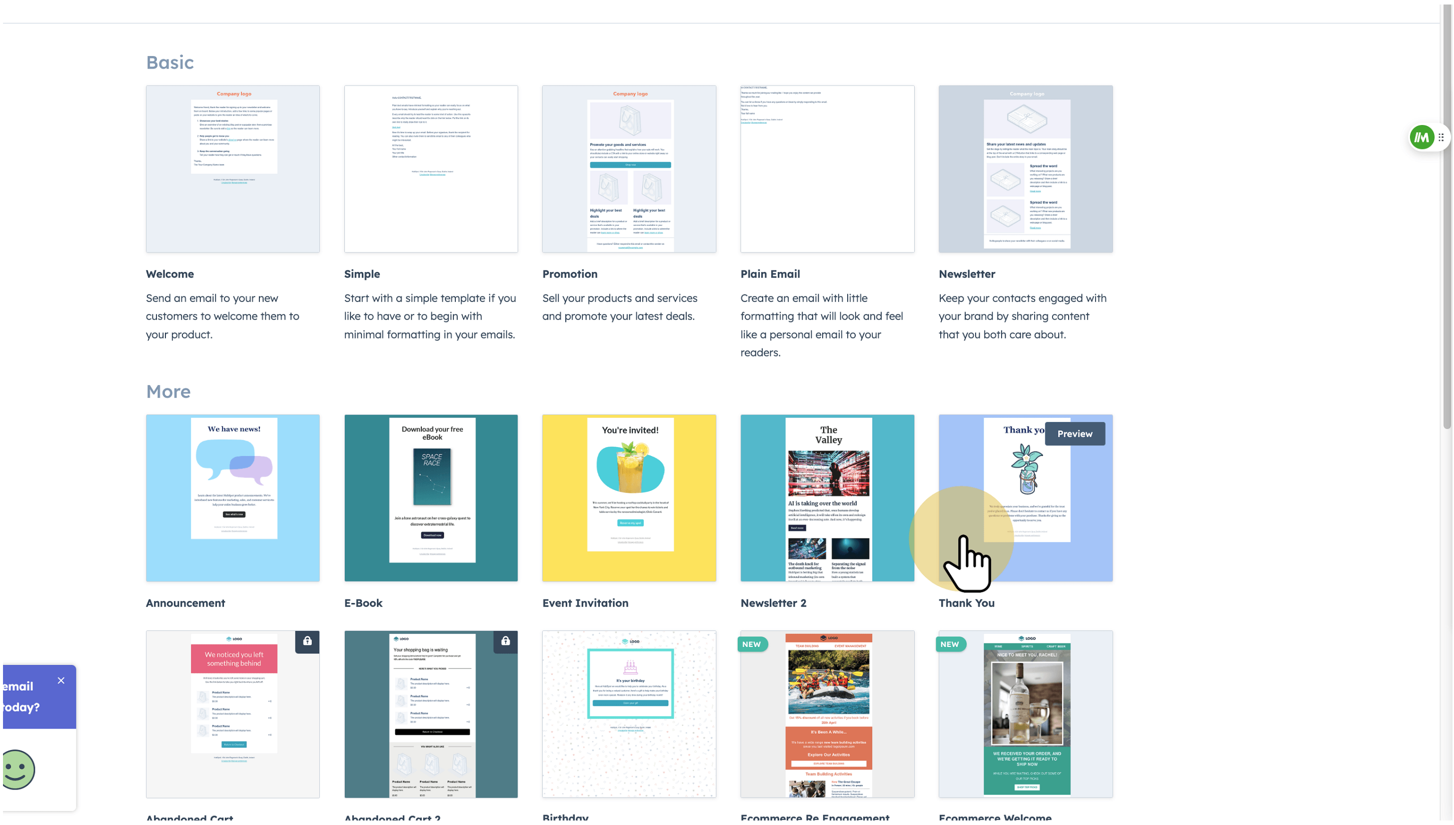
4 Select the email type 'Automated'

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

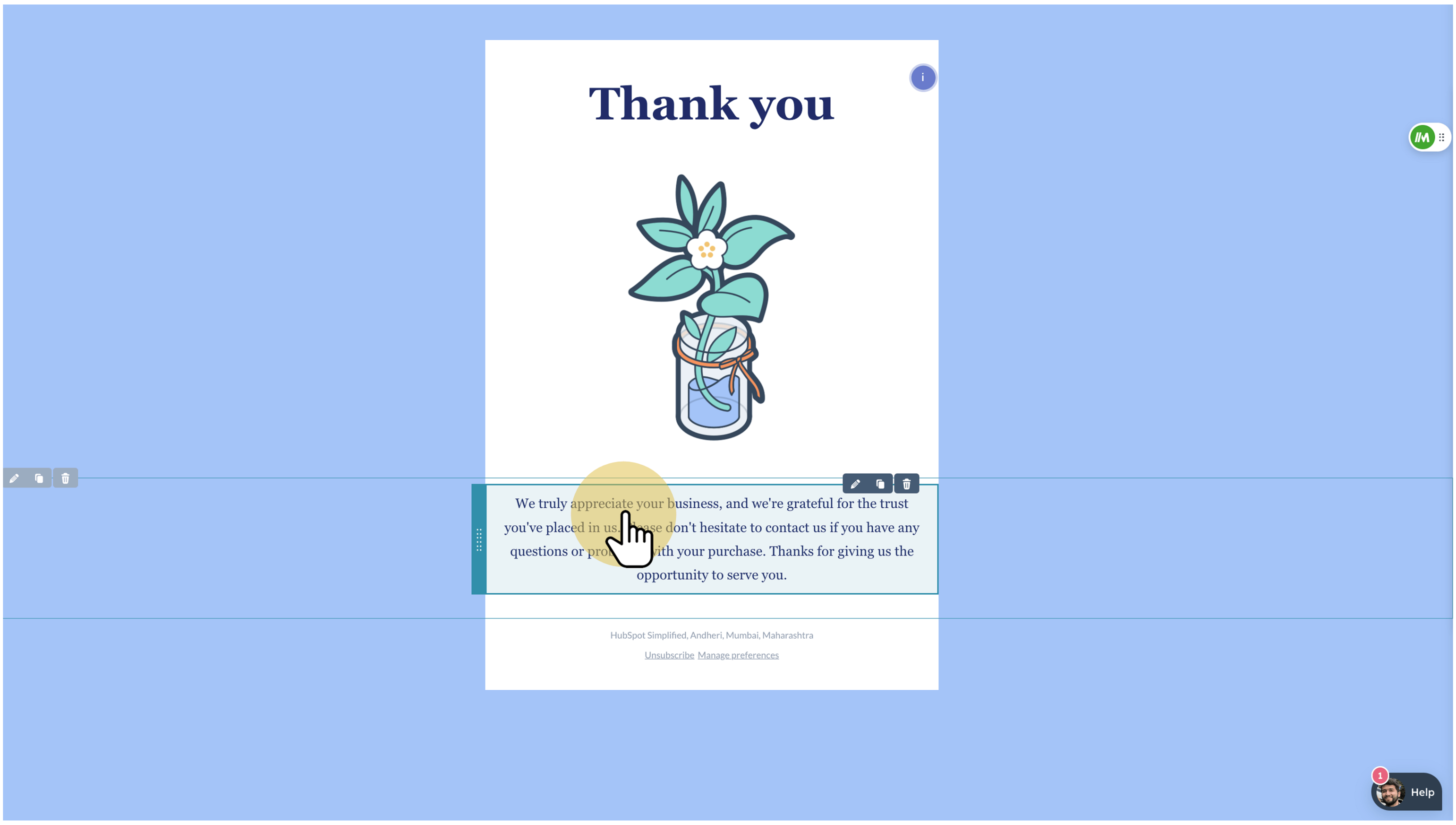


5 Select the 'Thank you' template

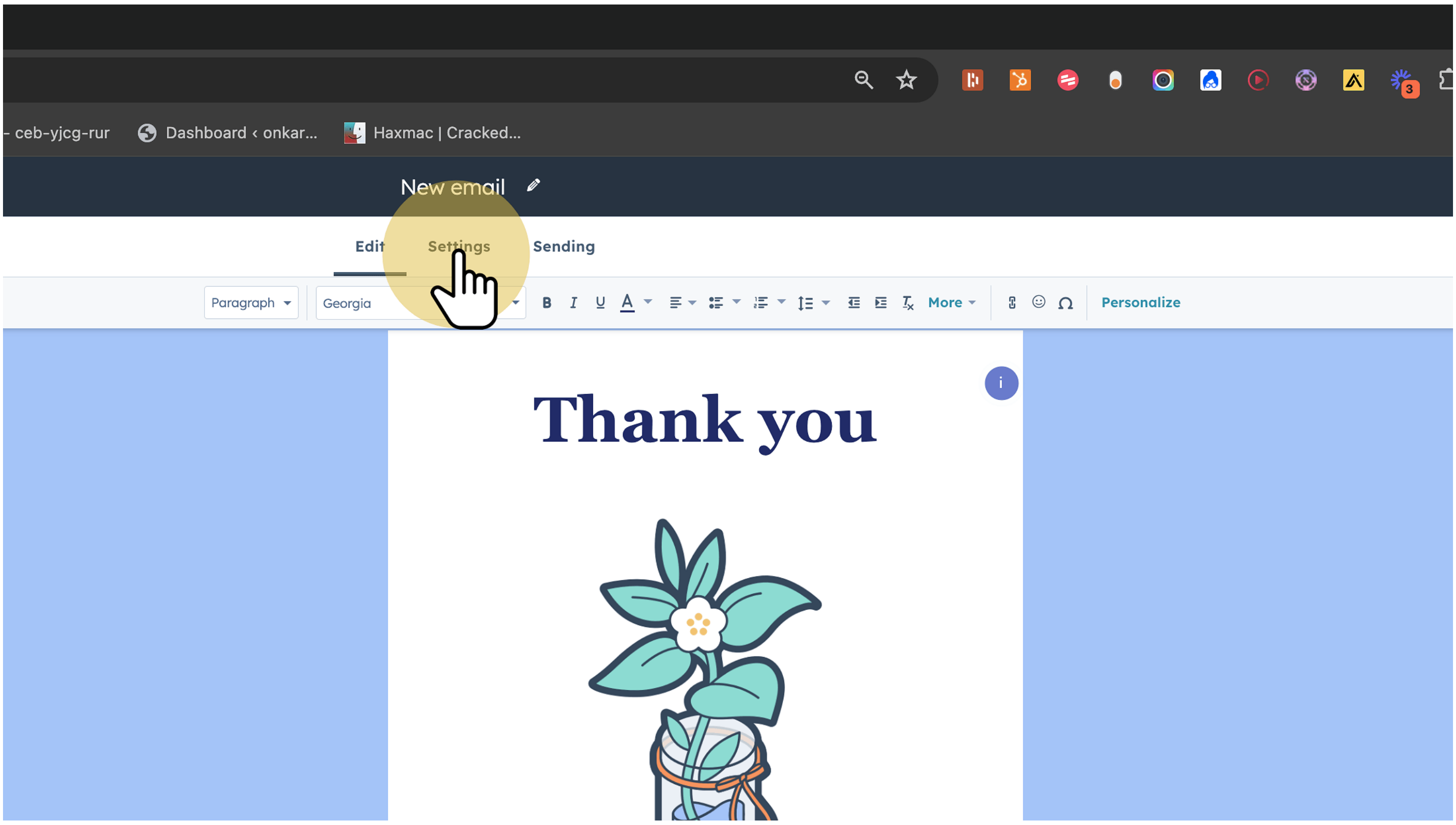
You can either create an email from scratch or make use of the pre-made templates from HubSpot. We are going to make use of one such template.



6 Edit the email content as per your needs

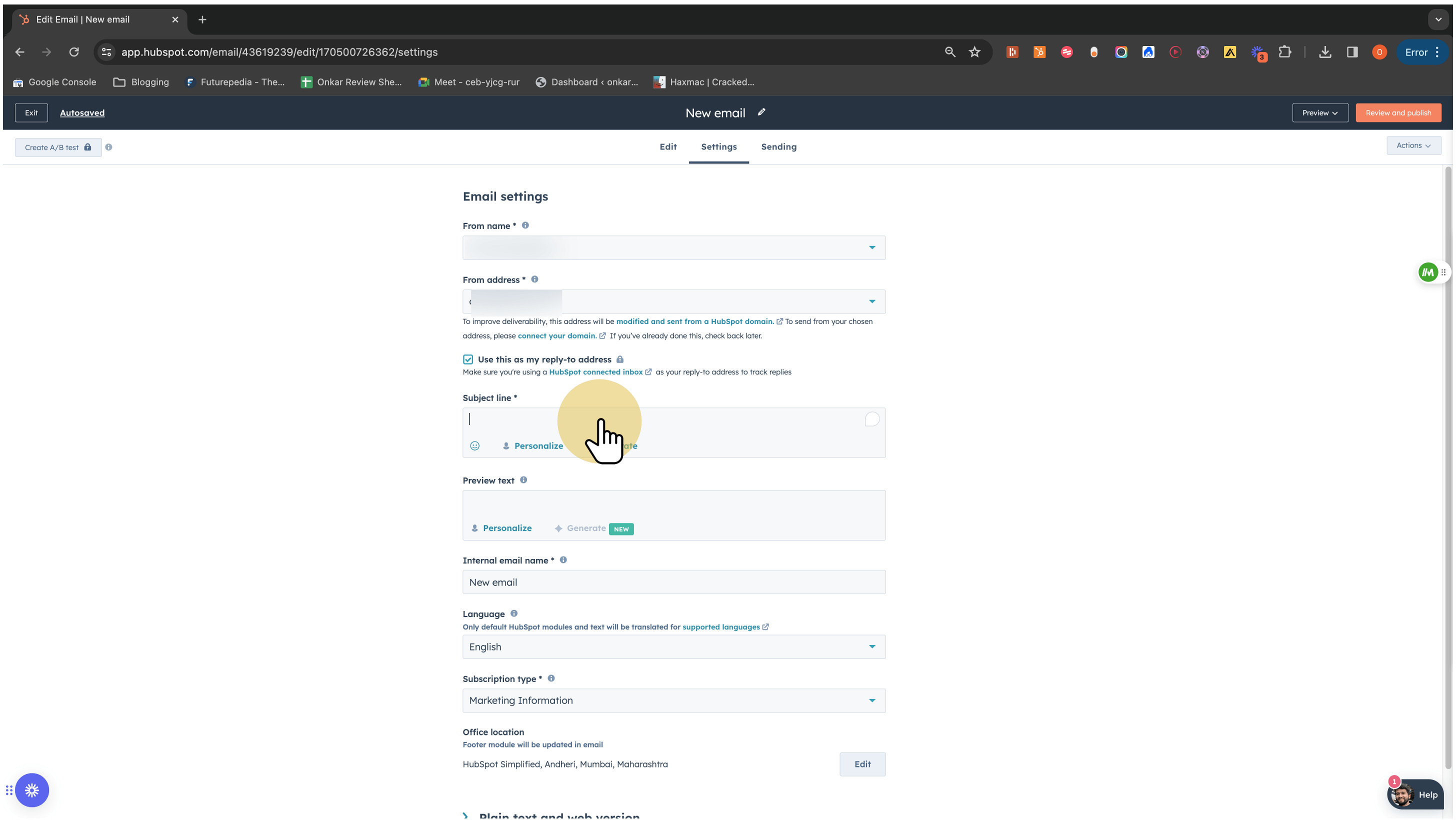


7 Click on settings



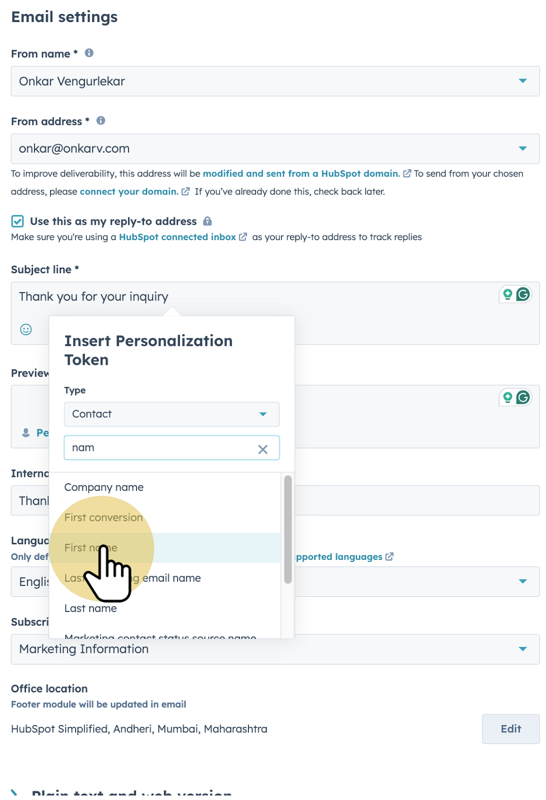
8 Configure your emails

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



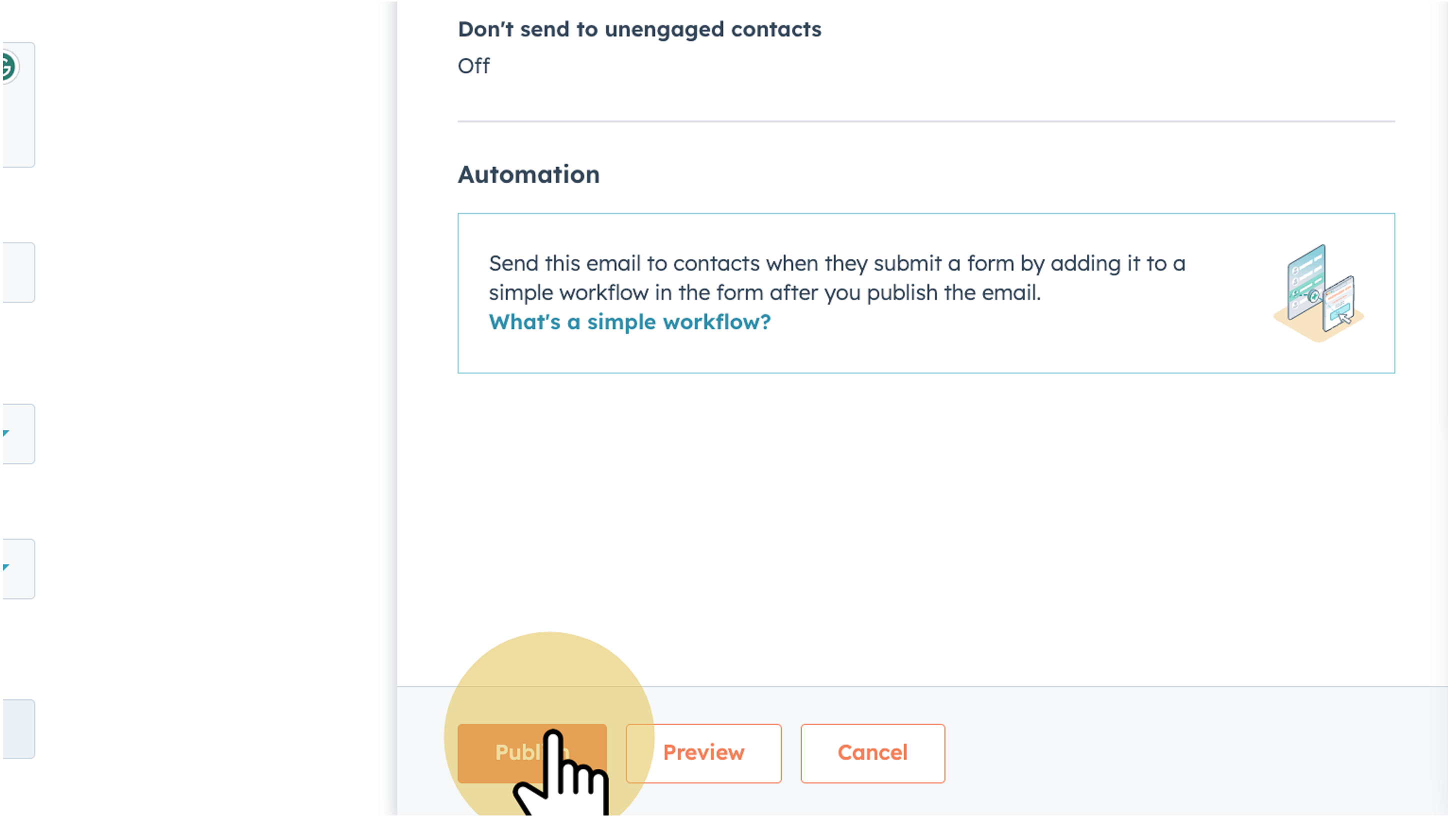
9 Personalize your email

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.



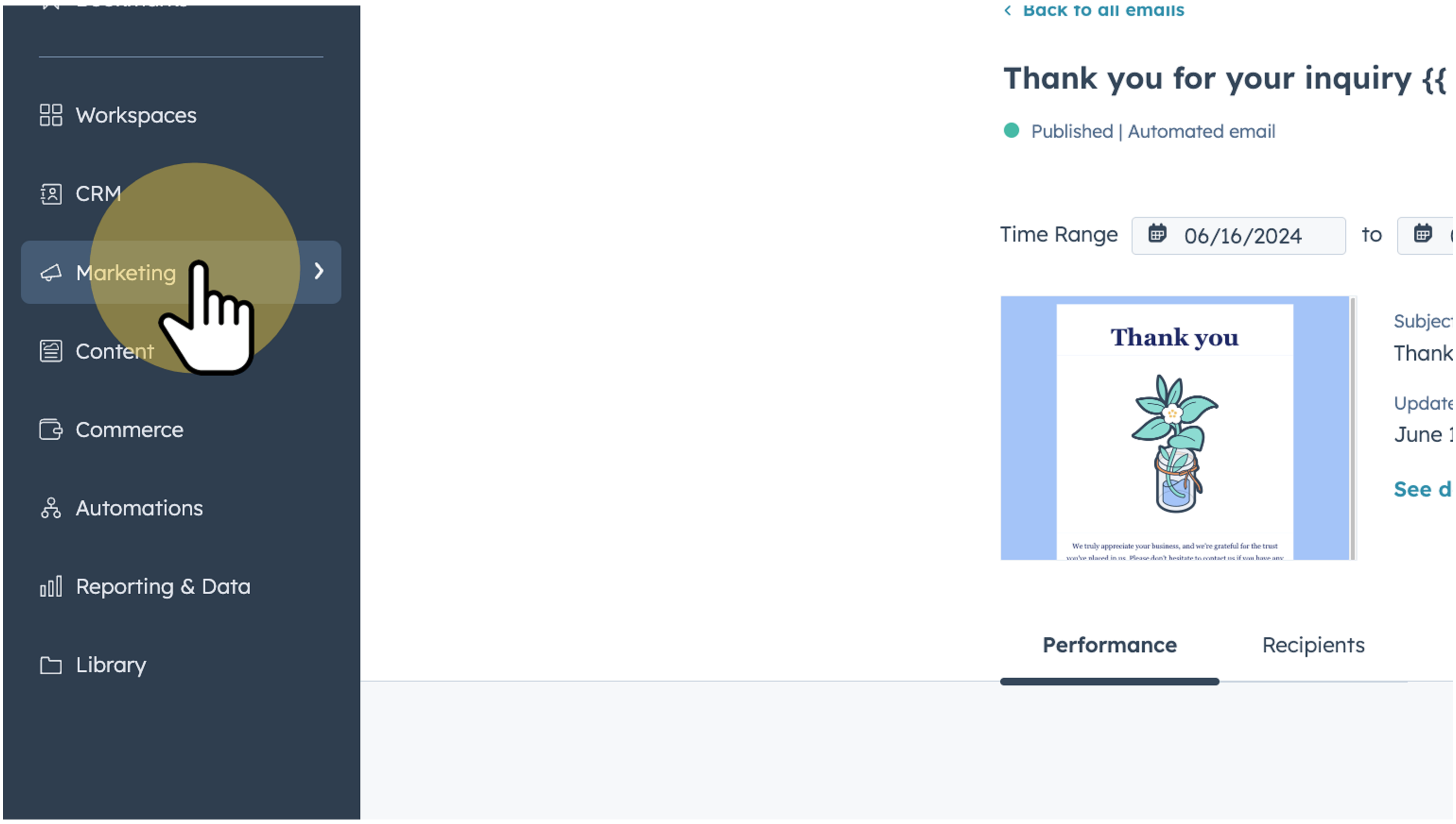
10 Review and Publish the email

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

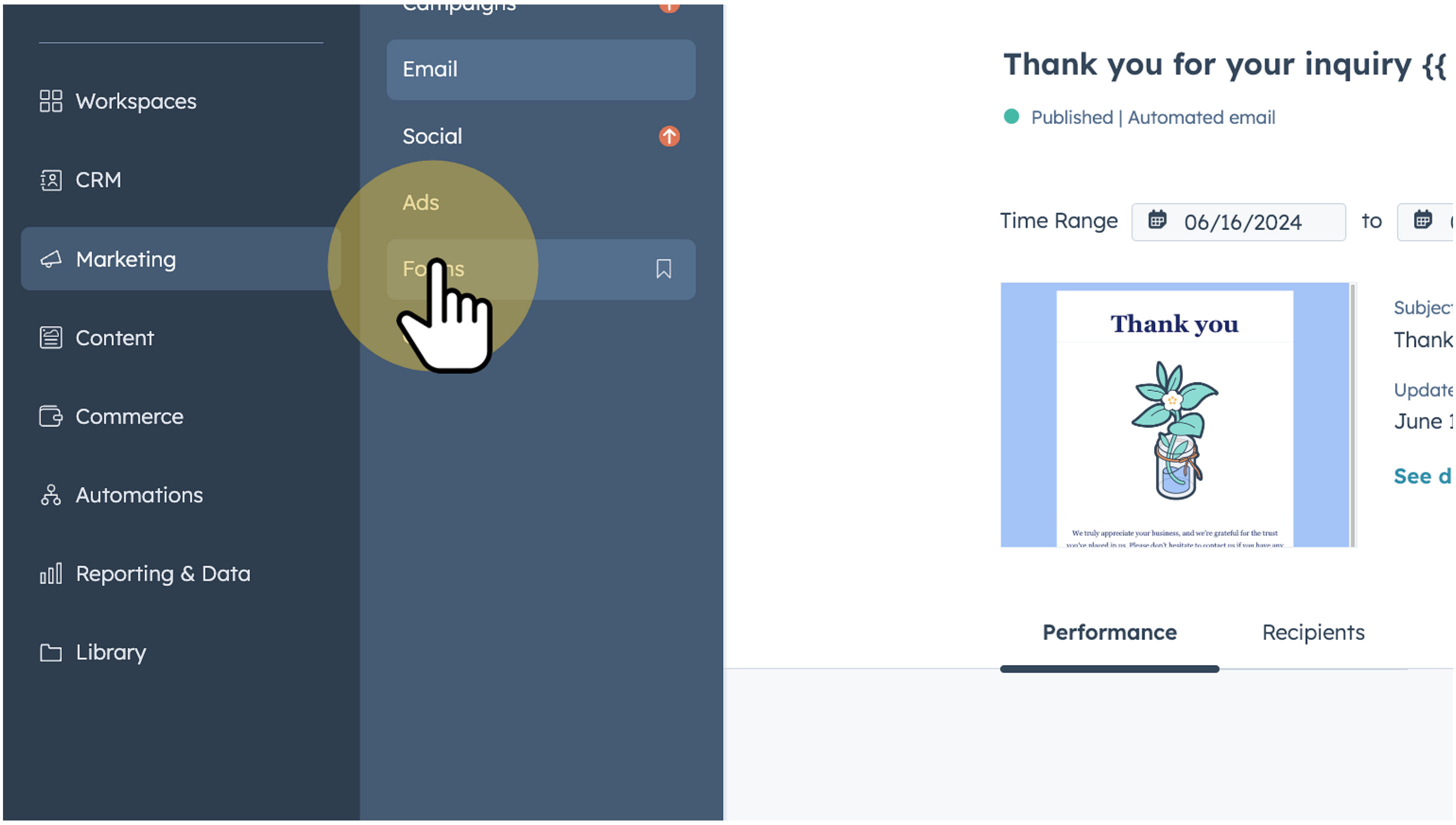


11 Let us configure the forms automation

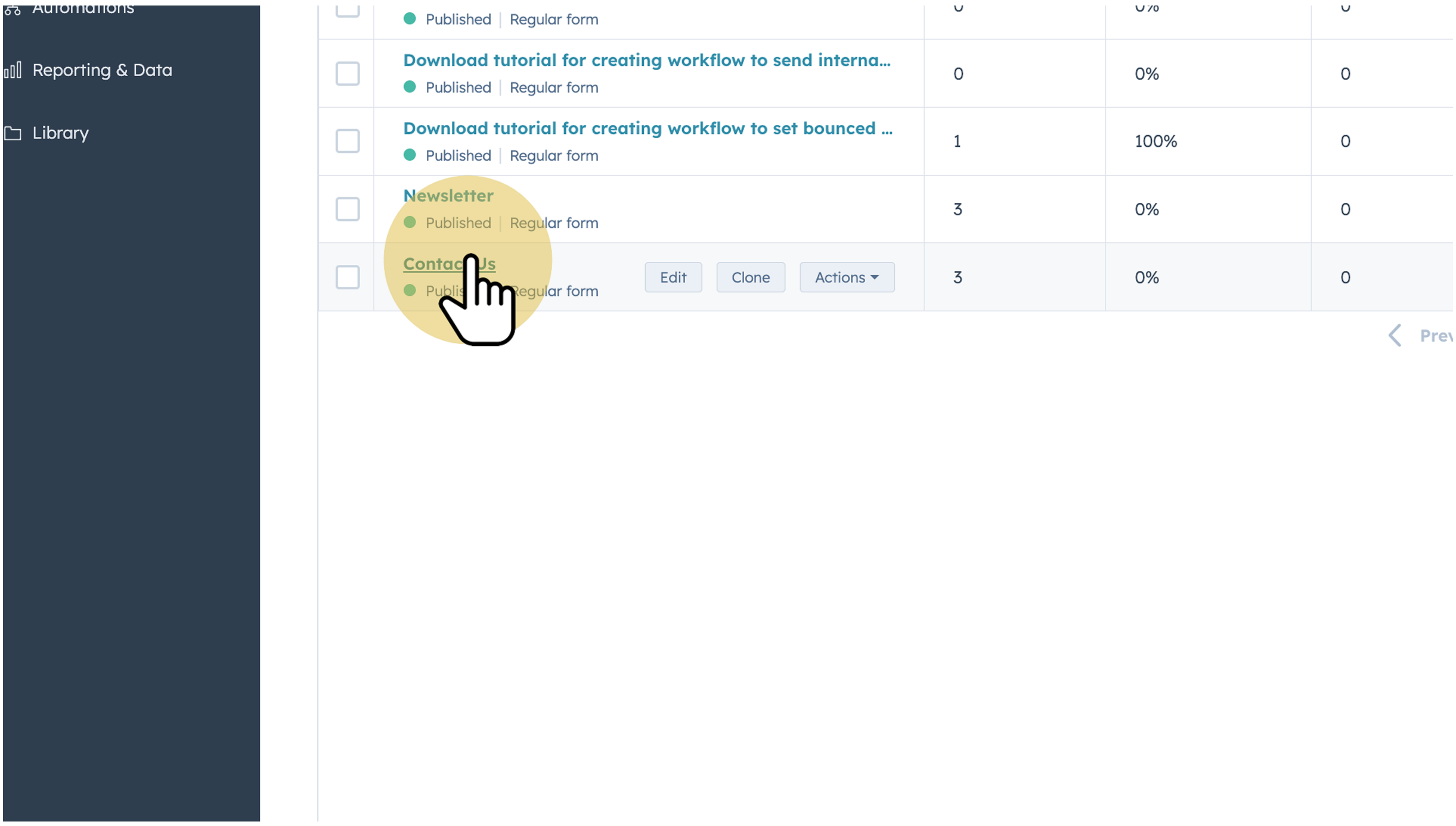
Select the marketing tab



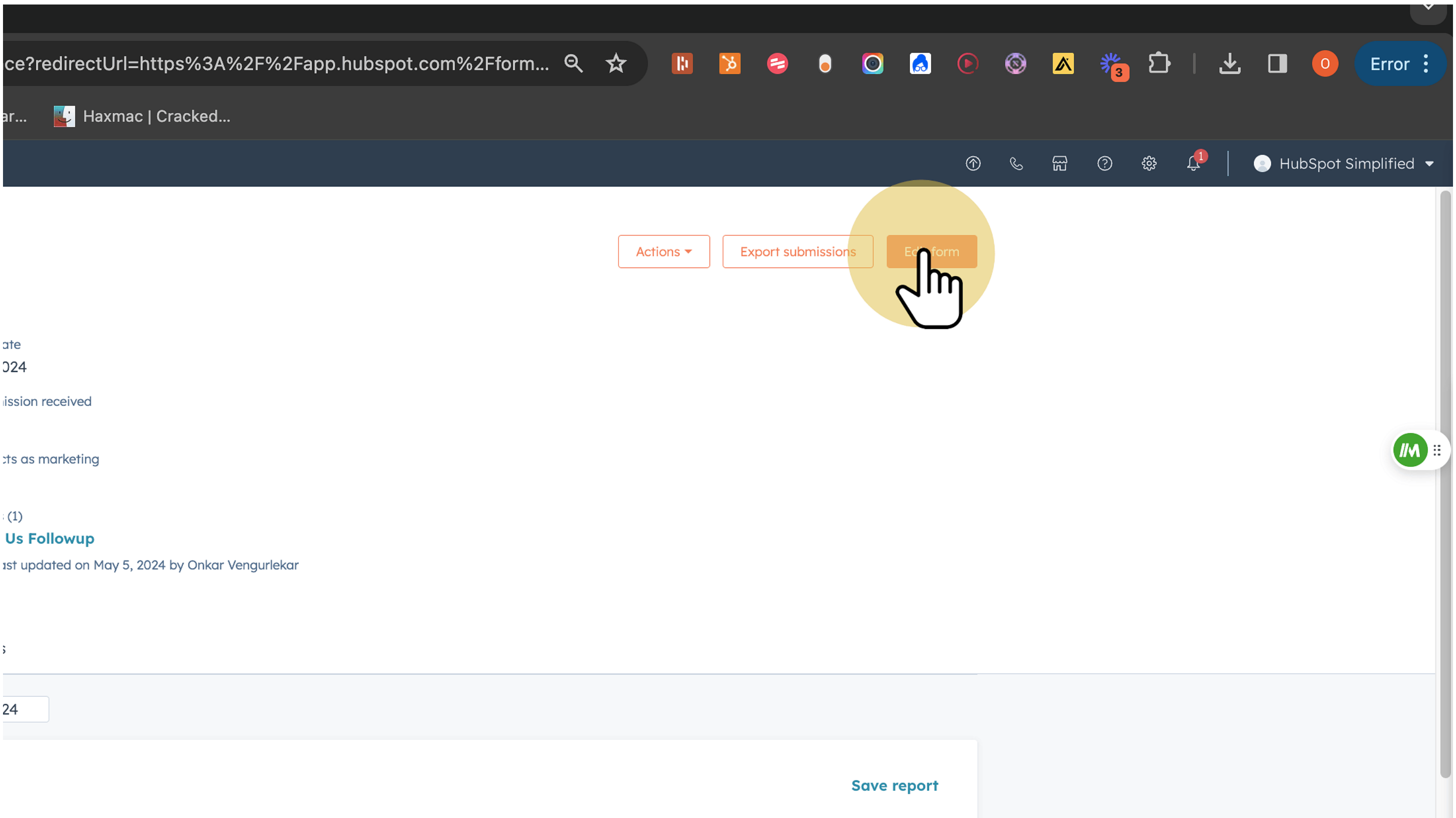
12 Go to Froms



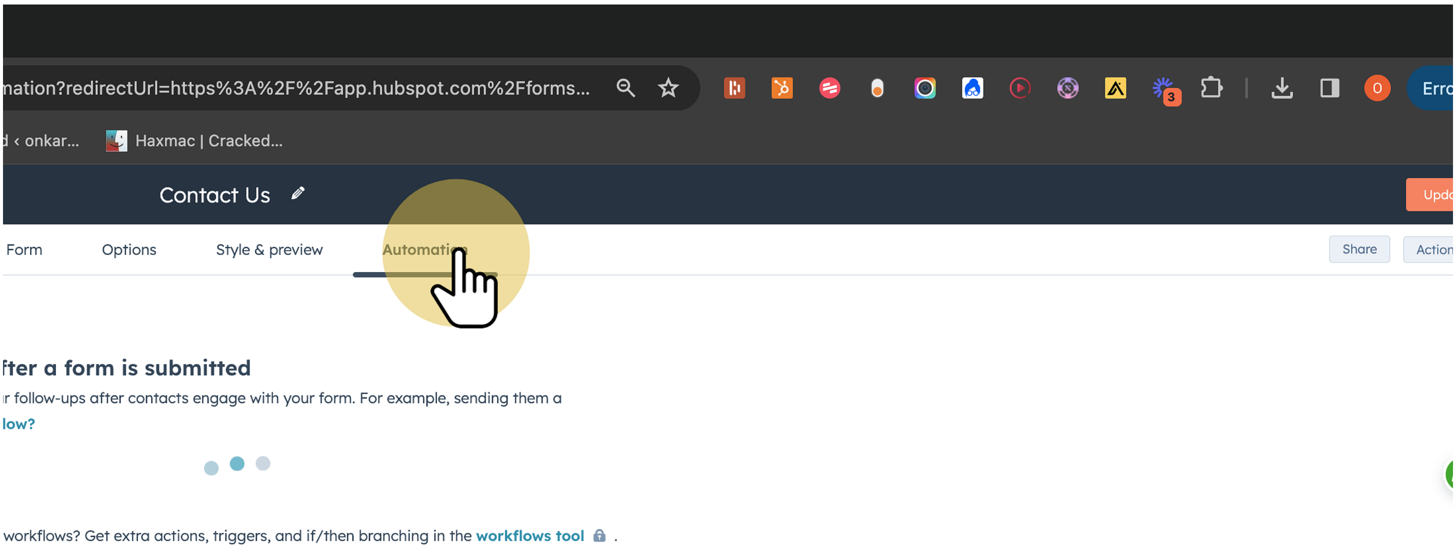
13 Select the Inquiry form you want to add the automation to



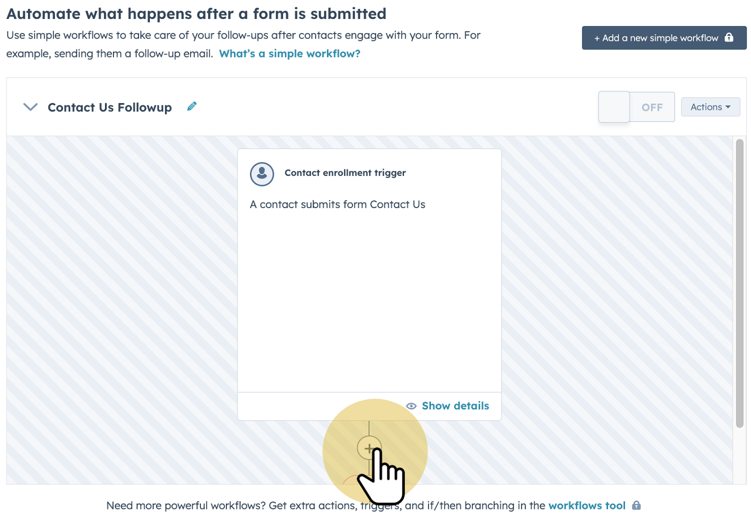
14 Click on 'Edit Form'



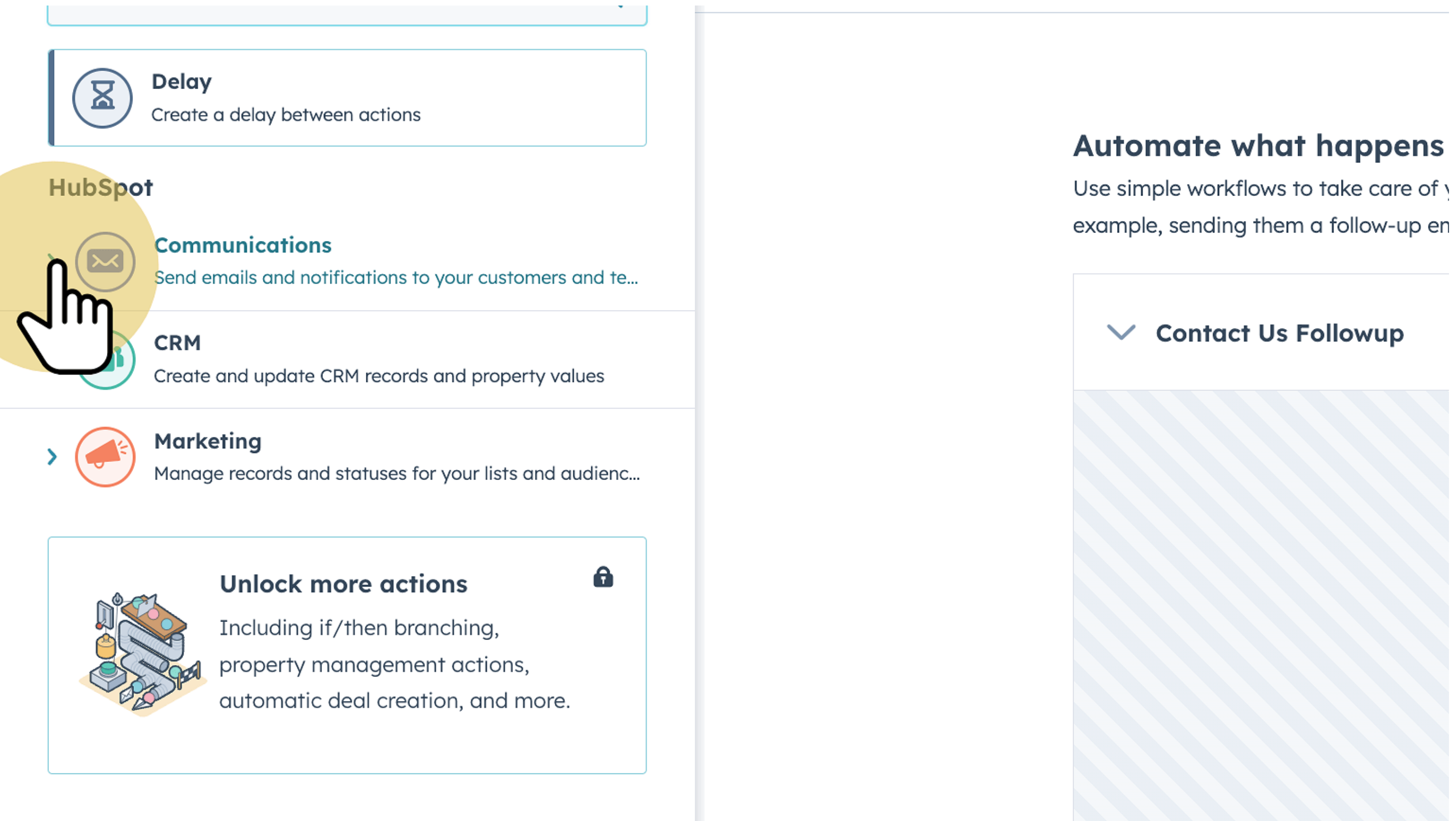
15 Click on 'Automation'



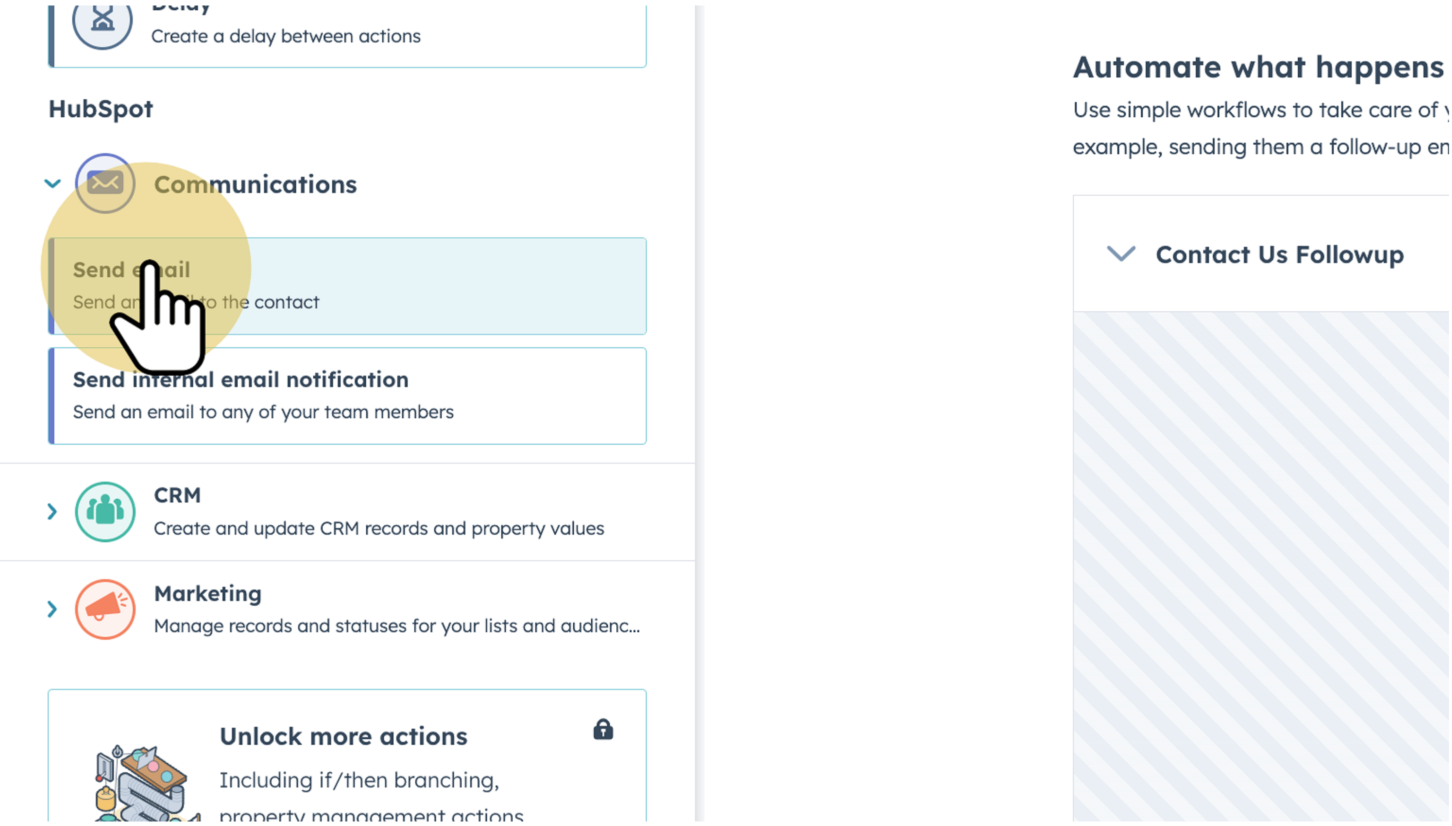
16 Click on the '+' icon



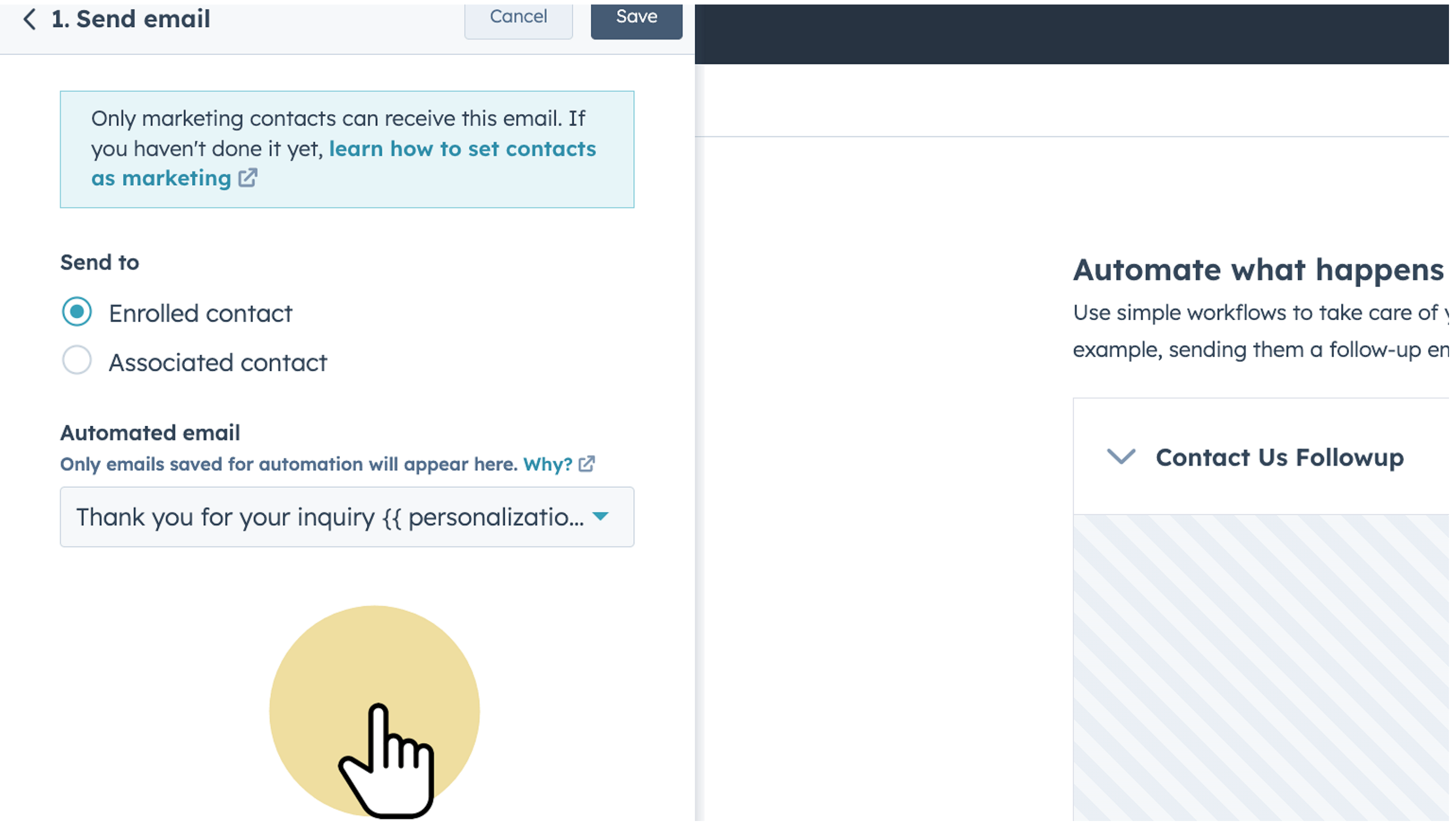
17 Click on 'Communications'



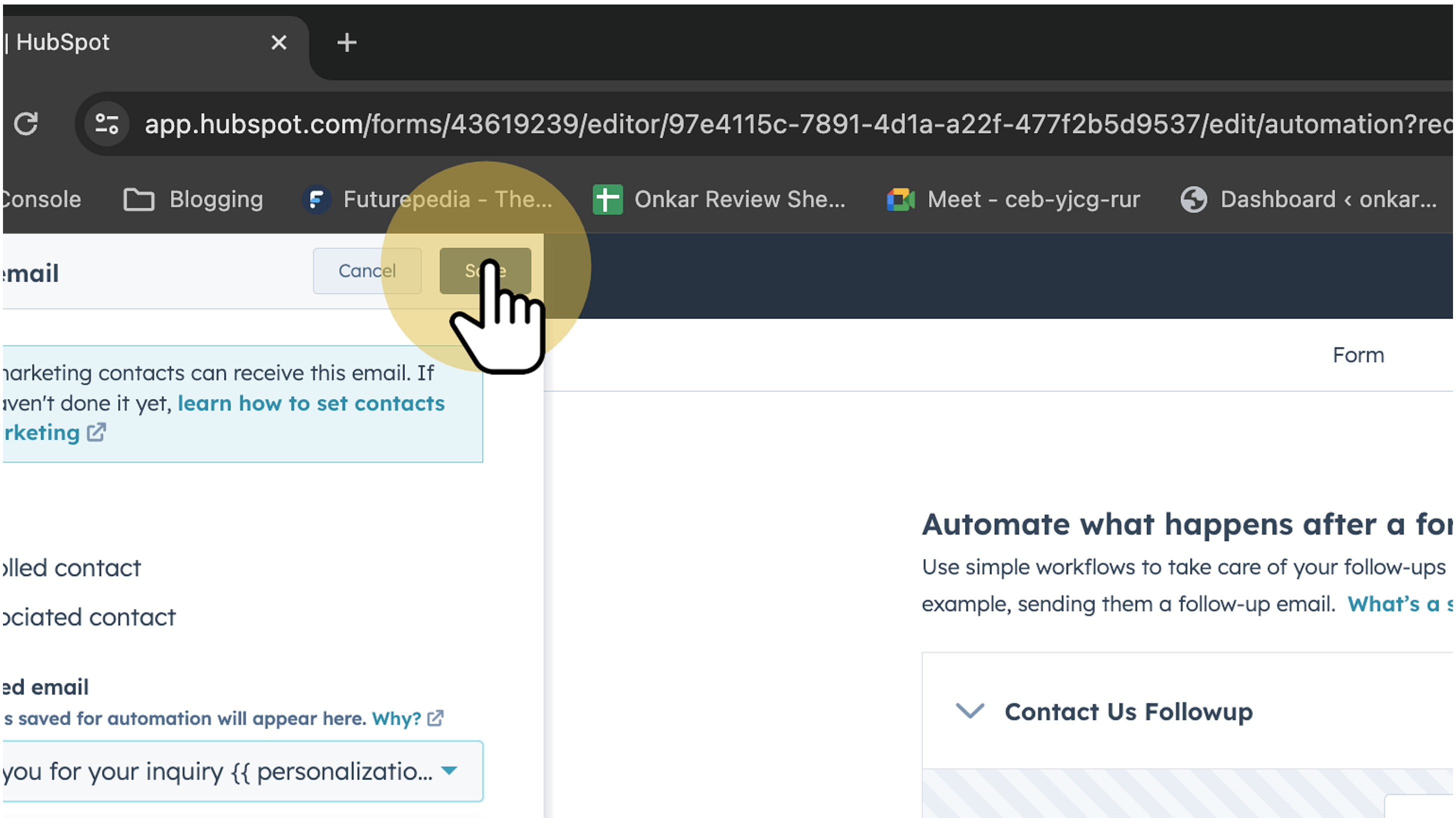
18 Select 'Send email'



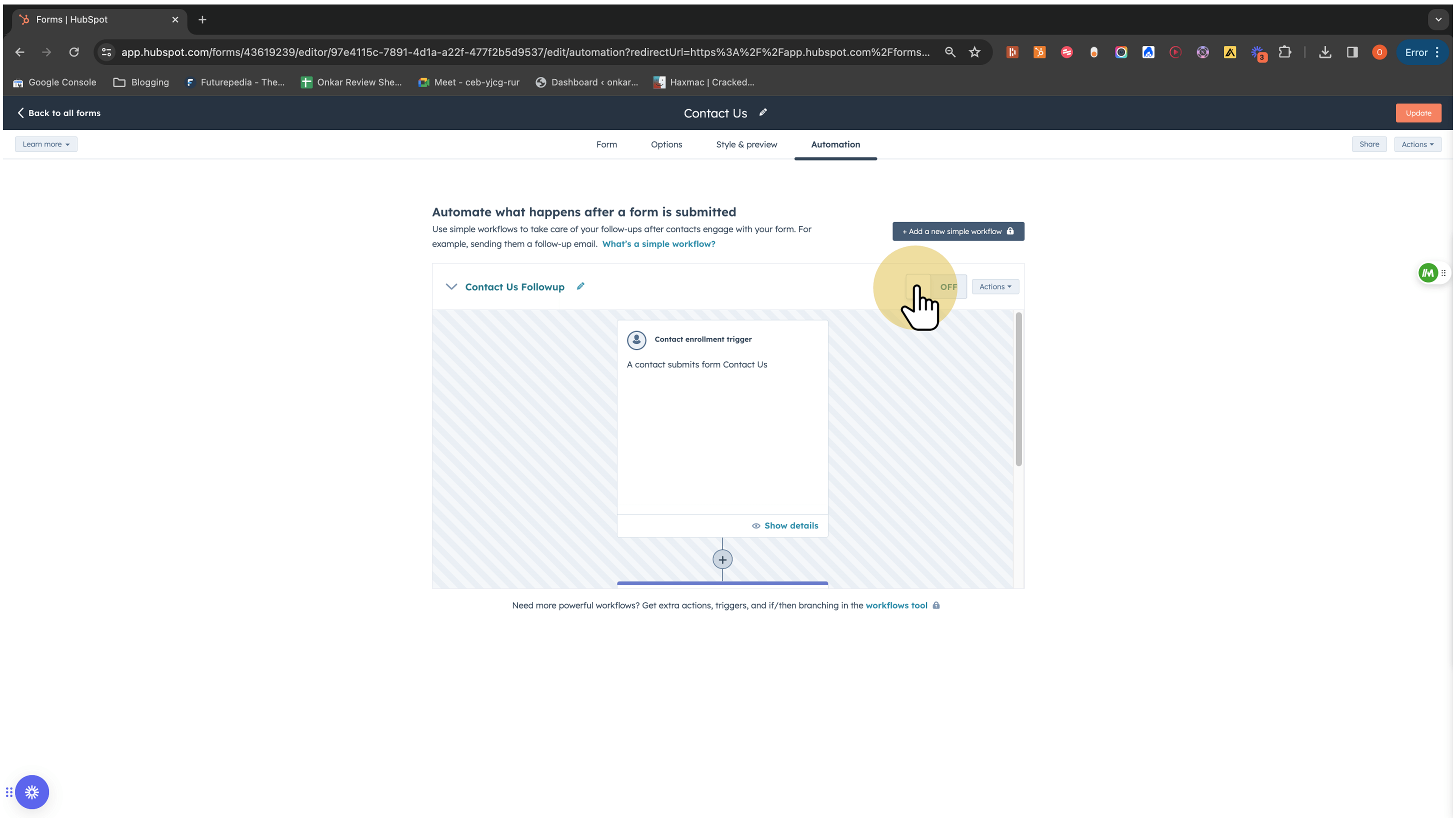
19 Choose the email you created from the 'Automated Email' dropdown



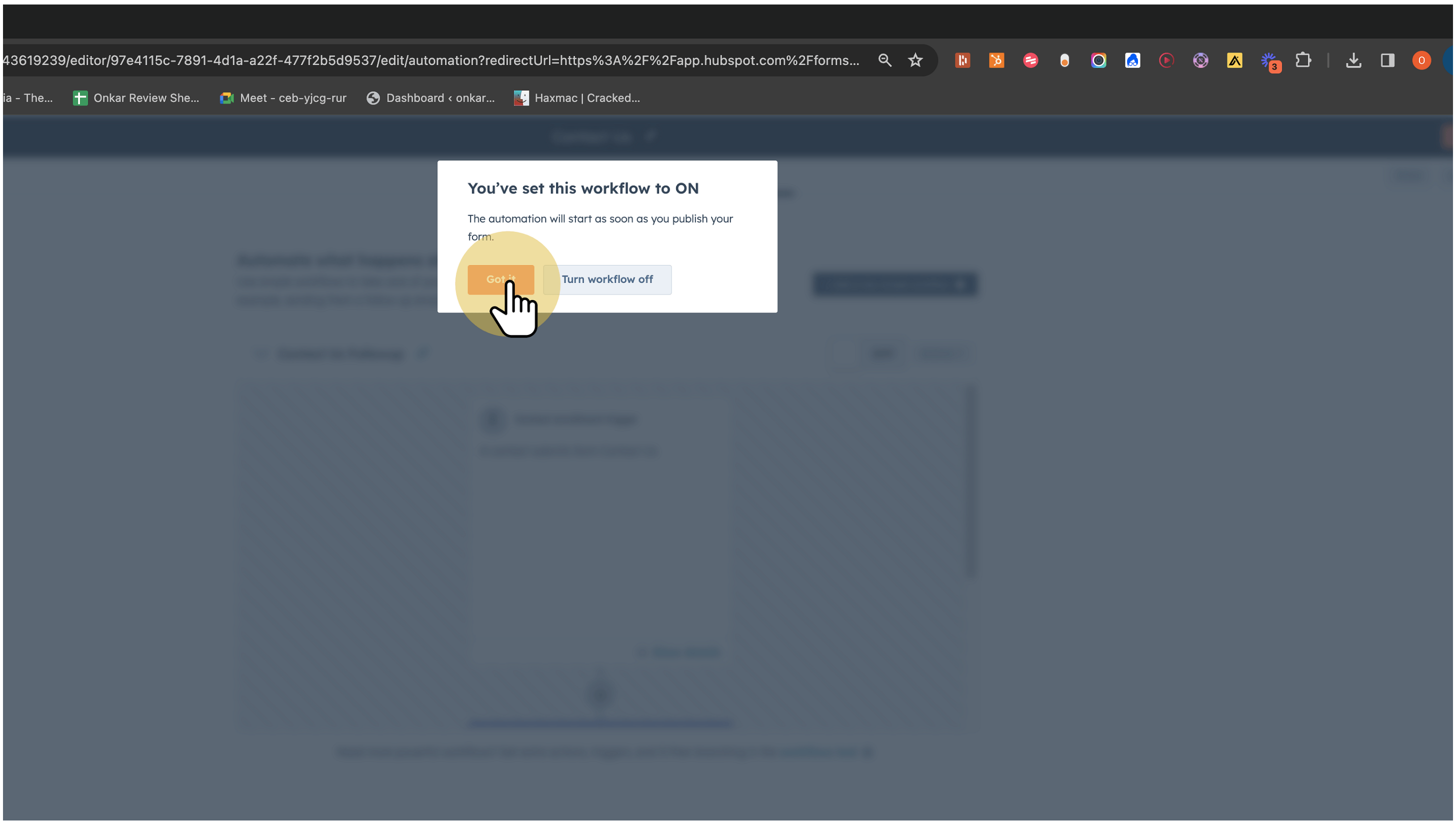
20 Click on 'Save'



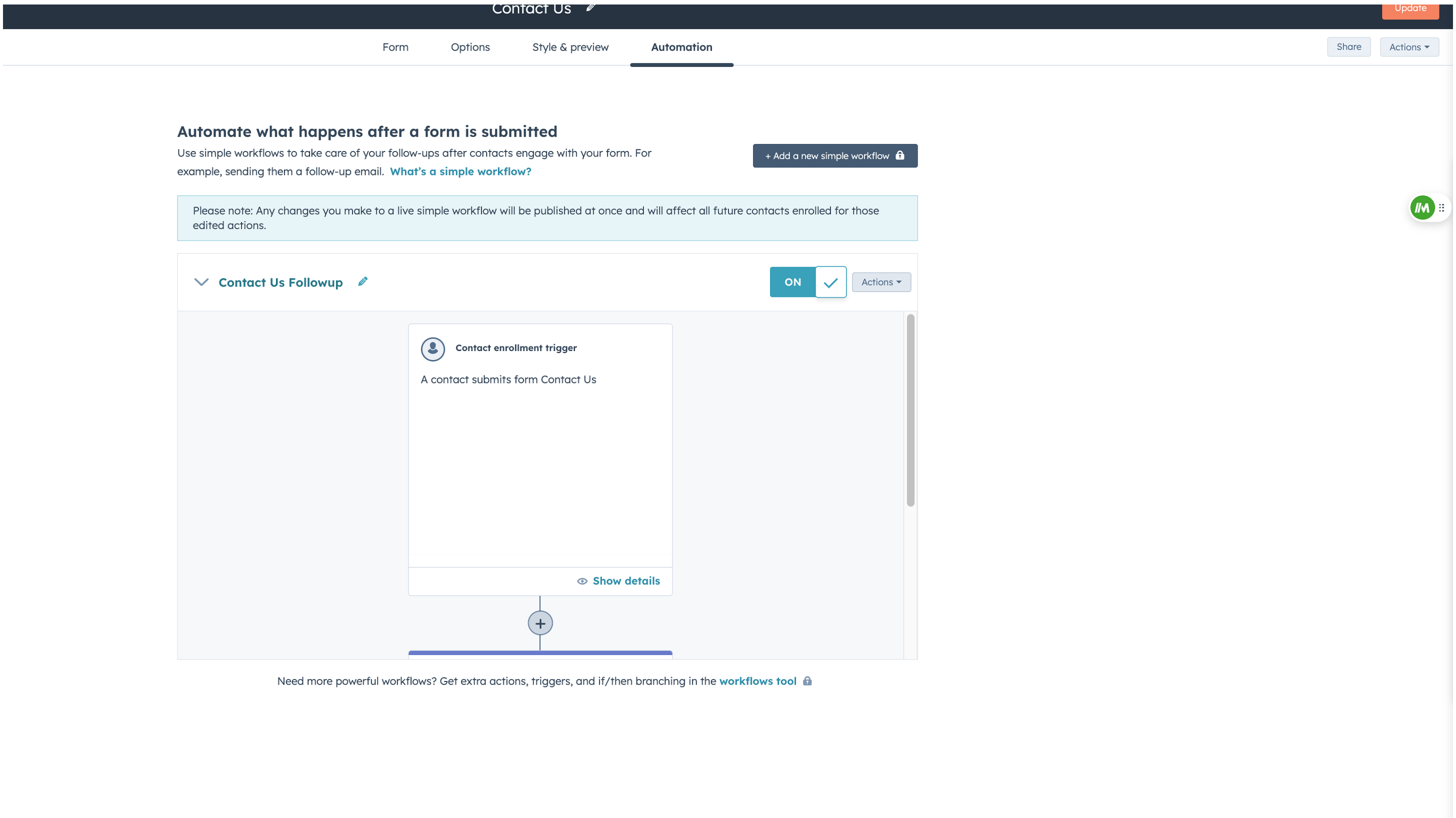
21 Turn 'ON' the automation



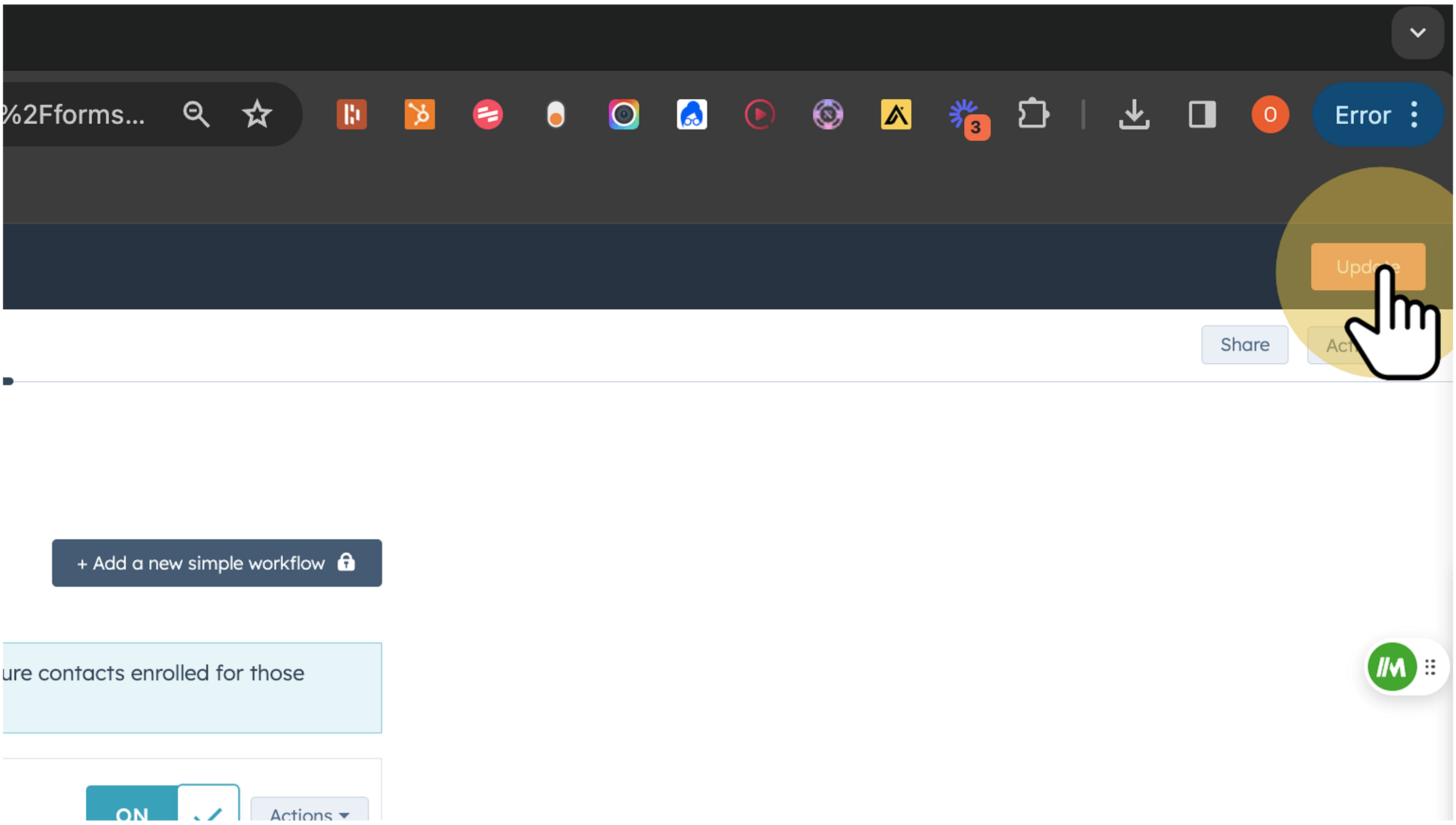
22 Confirm setting the workflow 'ON'



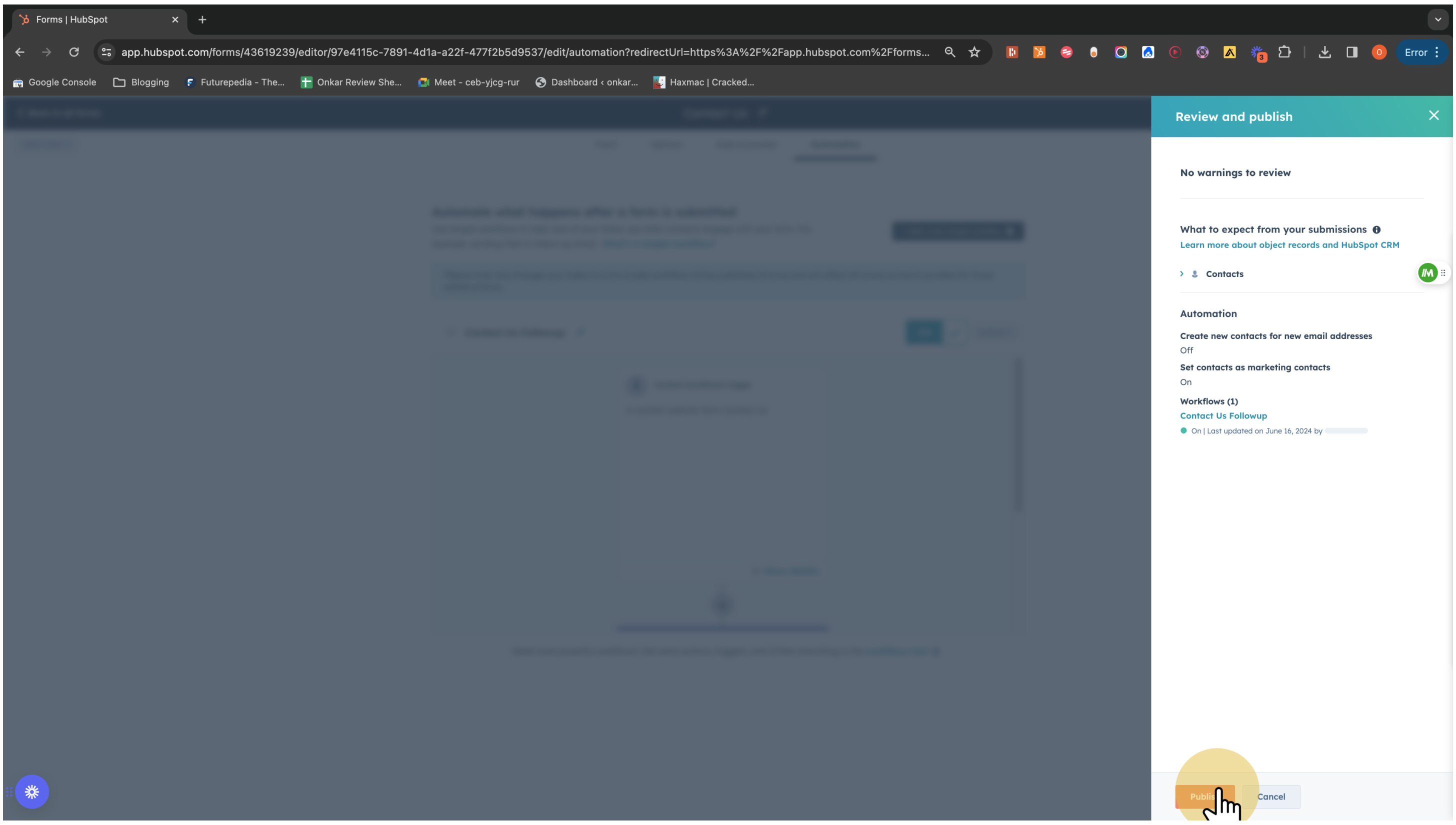
23 Your form automation workflow is now activ!



24 Click on 'Update' to update the form changes



25 Publish the form



26 The form automation changes are now live!