Automatically collect data from your subscribers via SMS

Alexis - 2025-06-26 - Comments (0) - How To Create Workflows

You now have the power to automatically collect additional data from your subscribers via SMS.

This means you can collect info such as…

- Name
- Email address
- Physical address

…all directly through SMS.

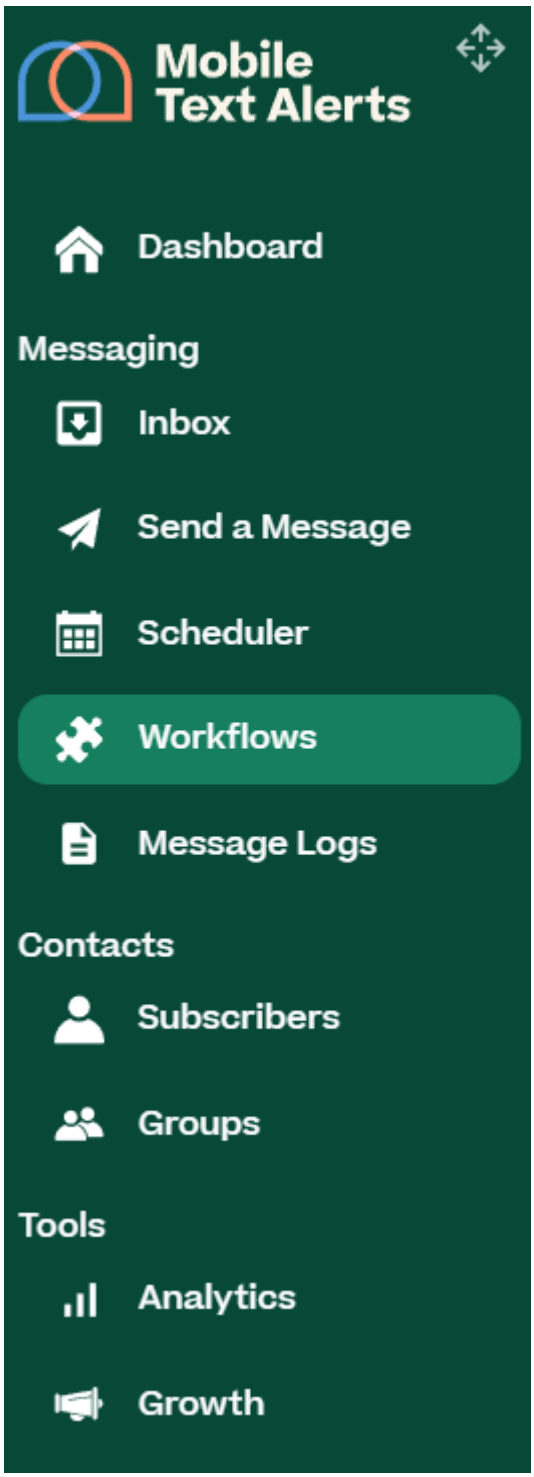
No need for subscribers to fill out extra forms or for you to chase after them to get more information.

Here’s how you can do it.

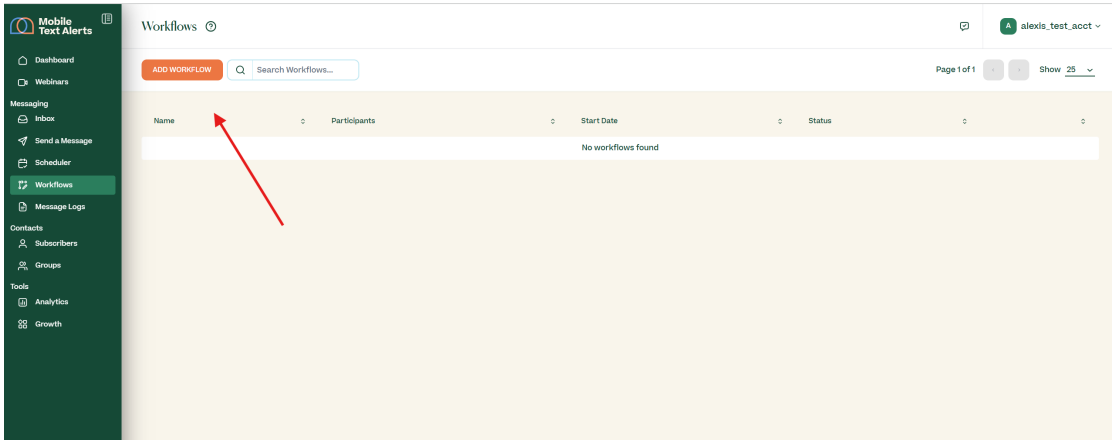
Step 1: Create a new workflow

The first step is to create a new workflow within your Mobile Text Alerts dashboard.

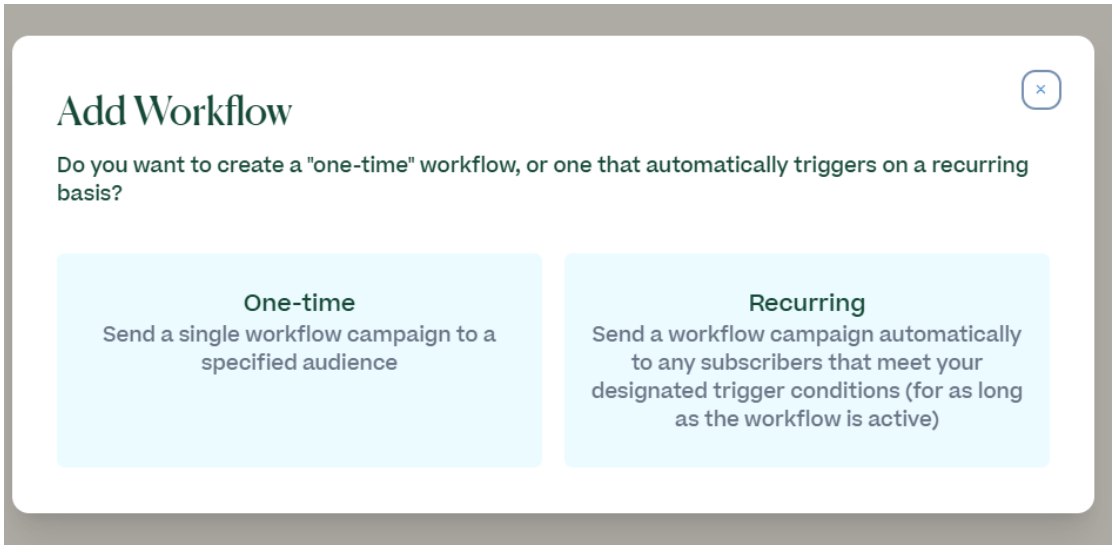
First, go to the “Workflows” tab.



Then click “Add Workflow.”

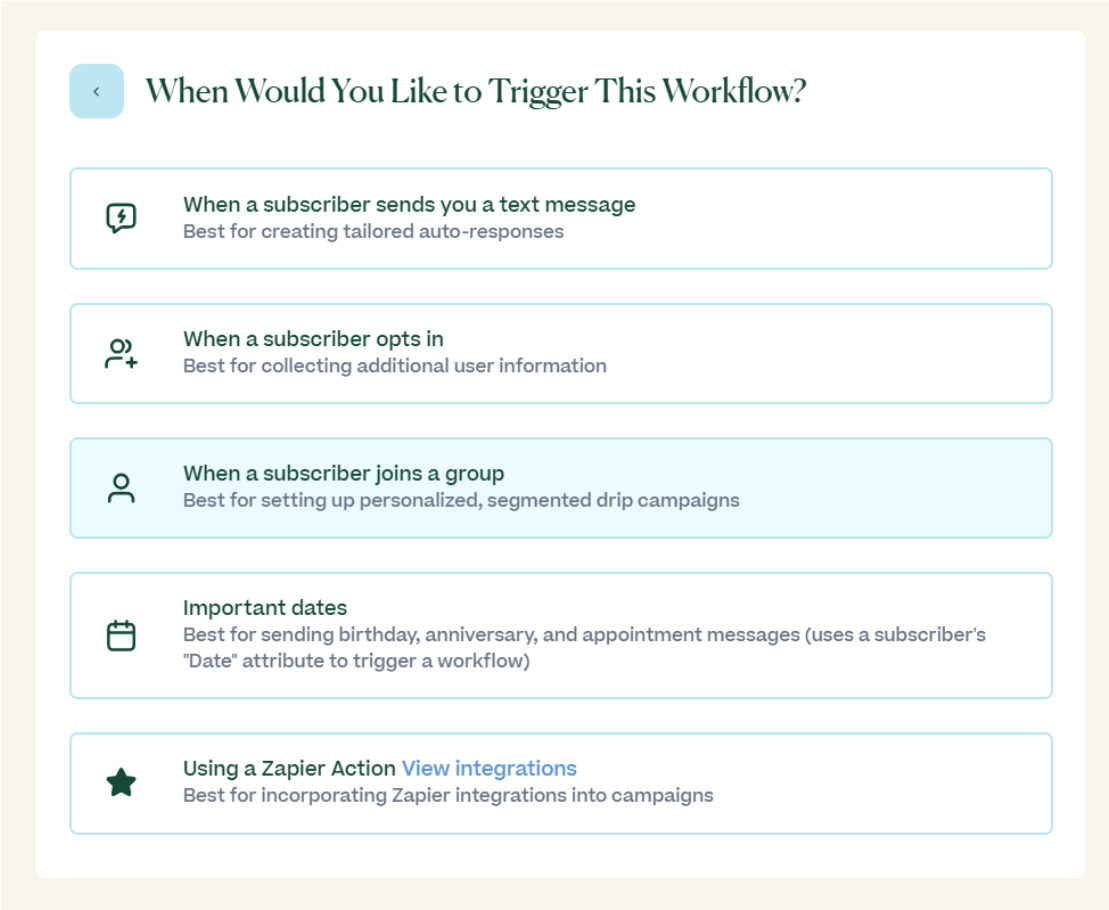


Select the “Recurring” option.

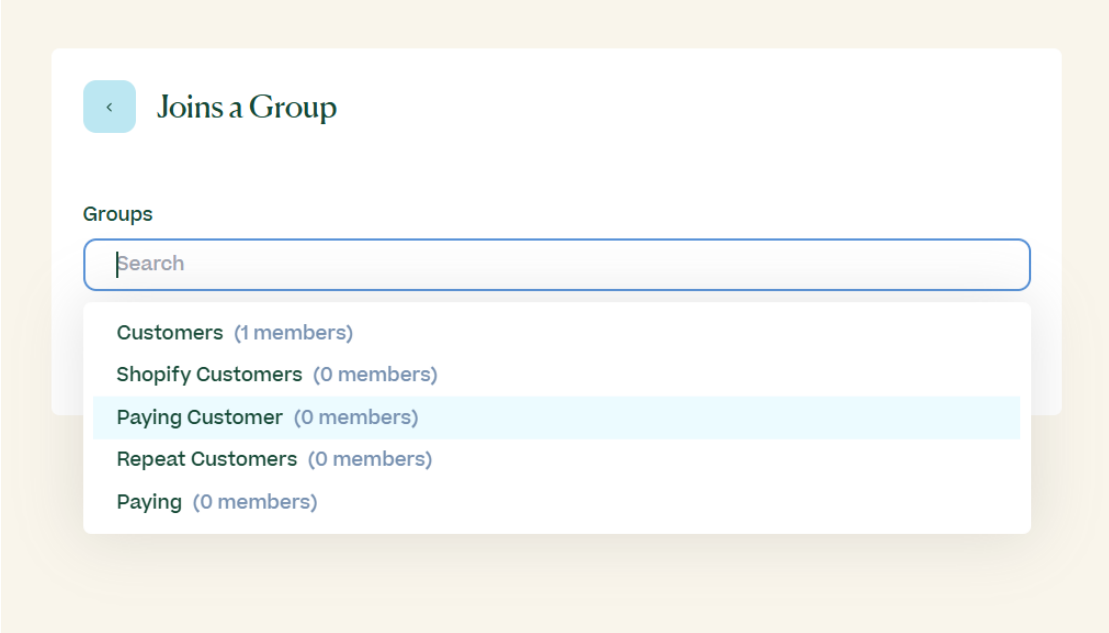


Depending on your preference, you could then select “When a subscriber opts in” or “When a subscriber joins a group” as the trigger for the workflow.

If you want to collect information from everyone who first opts into your SMS list, select "When a subscribers opts in." If you prefer to collect information from people when they join a particular group in your SMS list, select "When a subscriber joins a group."



You can then select which specific opt-in method(s) or group that you'd like to trigger the data collection that you're looking for.



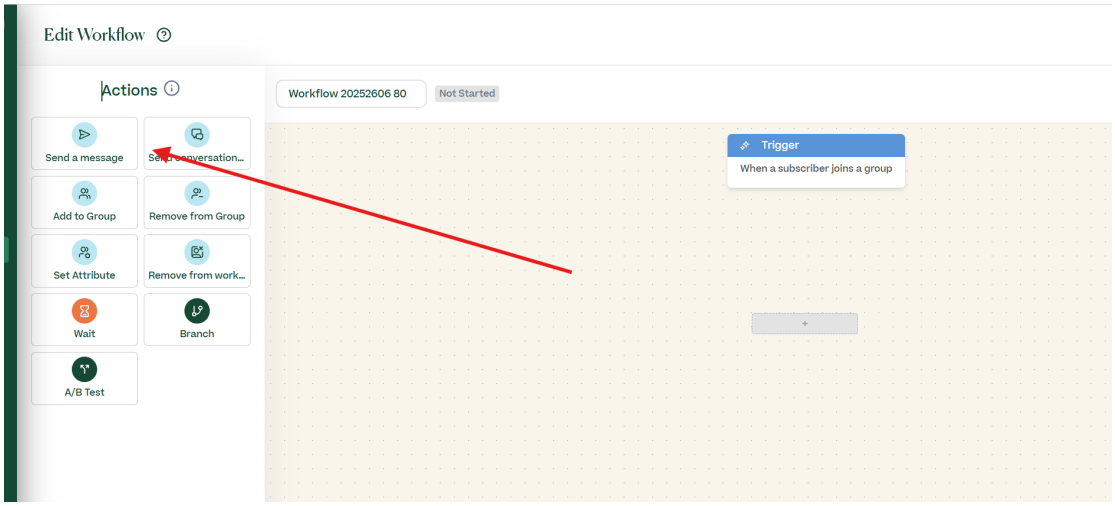
Step 2: Add messages to your workflow

Your next step is to add in the messages with the questions that you'd like to ask subscribers in order to collect their data.

For example, you could ask questions such as...

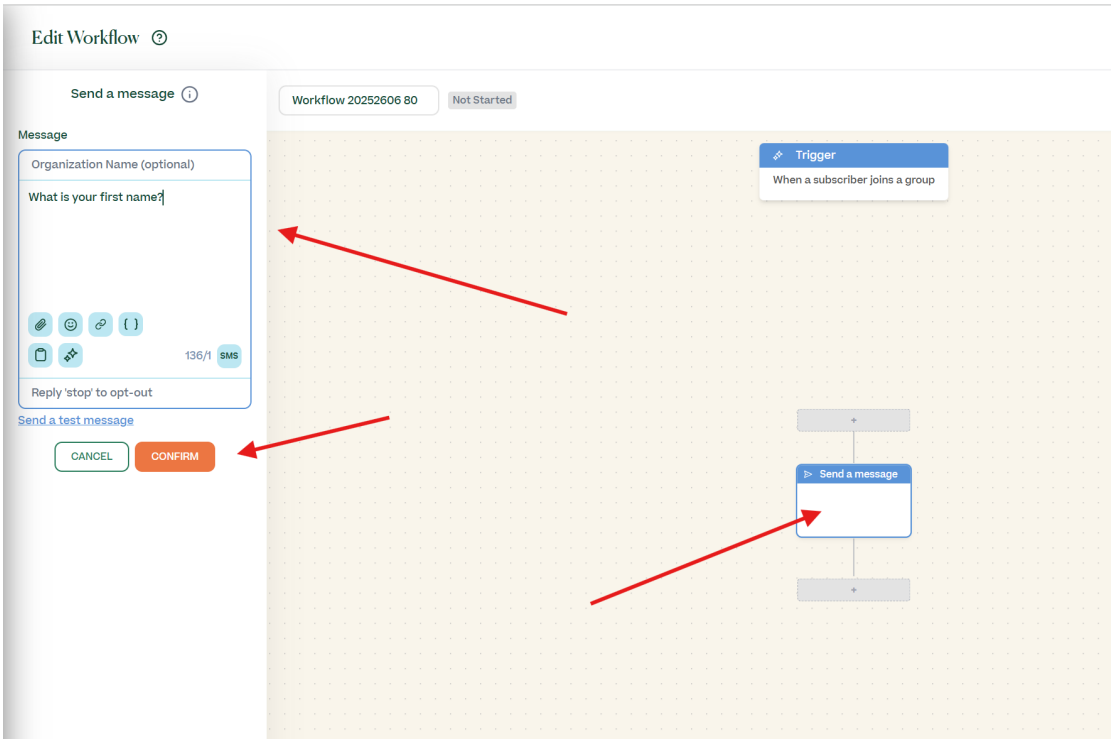
- What is your first name?
- What is your email address?

Drag the "Send a Message" action into the workflow editor.



Click within the "Send a Message" action that you just dragged into the editor and type in the message content in the message box that appears.

Click "Confirm" to save your message.



Repeat this process for every question that you'd like to ask your subscribers.

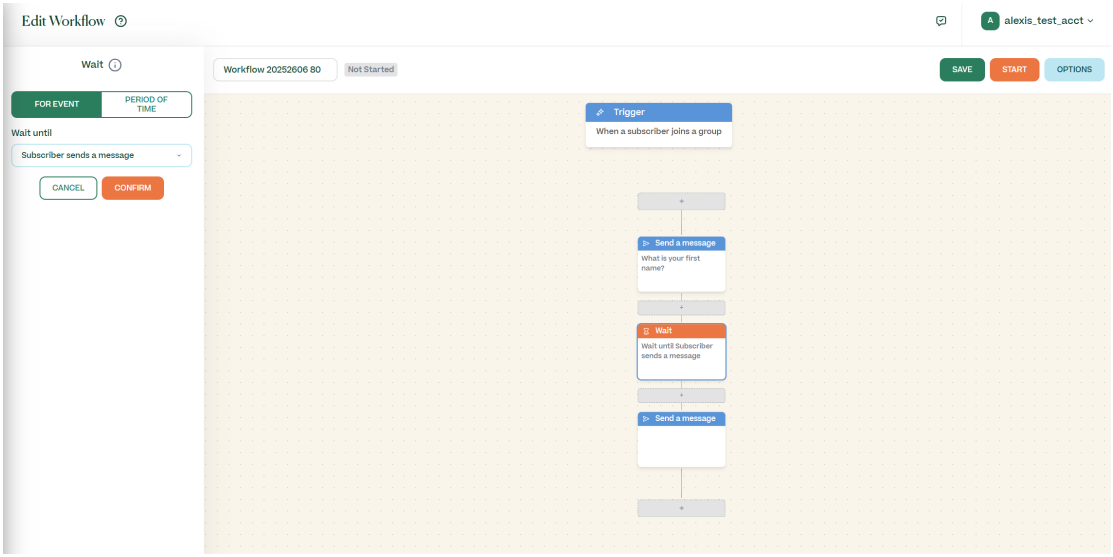
Step 2: Add "wait" actions to your workflow

Now that you have your questions built out into your workflow, you need to add in "wait" actions.

These actions allow you to implement a pause so that you can wait until the recipient sends a response to your message before a new message is sent.

Drag a "wait" action after each "send message" action in your workflow.

Next, click on each "wait" action within the workflow and confirm "subscriber sends a message" as the "wait until" event. This means that your subscriber won't move to the next part of the workflow until they send a message in response to the message they received from you.



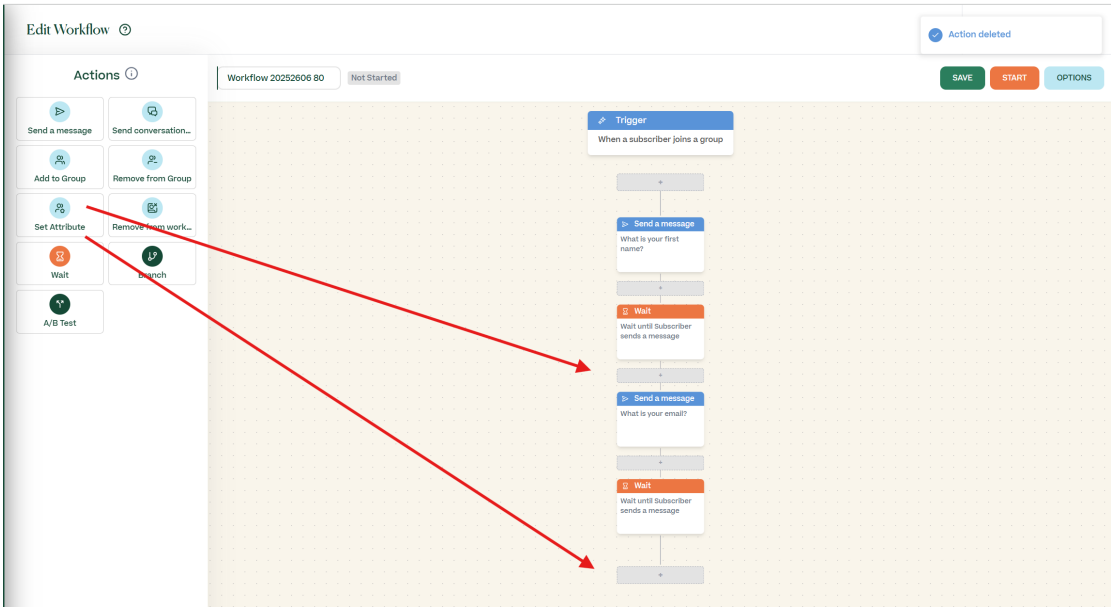
Step 3: Add “set attribute” actions to your workflow

The next step is to add in “set attribute” actions.

These actions make it so that whatever content your subscriber includes in their message when they reply to your question will get saved as the data for a particular attribute in their subscriber profile.

For example, if they reply with the word “John,” this can get saved as their “First Name” in your database.

Drag a “set attribute” action after each “wait” action in your workflow.

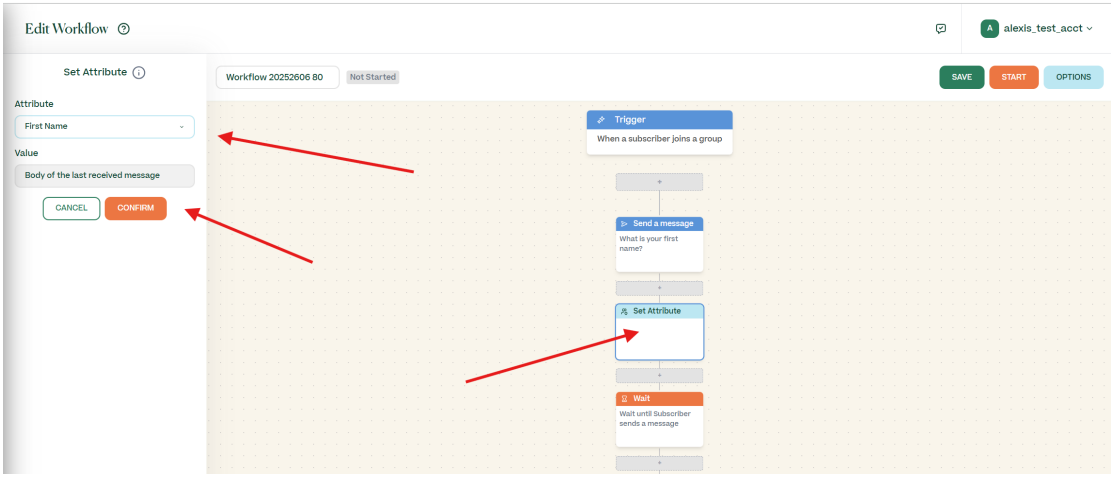


Click on each “set attribute” action within your workflow to designate the appropriate data point (“attribute”) that you’d like to get updated when your recipients reply to your message.

For example, if you have a message that asks “What is your first name?” you can have the “set attribute” action after that be assigned to the “First Name” attribute.

Then when people respond to the question, their first name will be updated in your system.

Click “Confirm” to save any changes you make to the “set attribute” action.



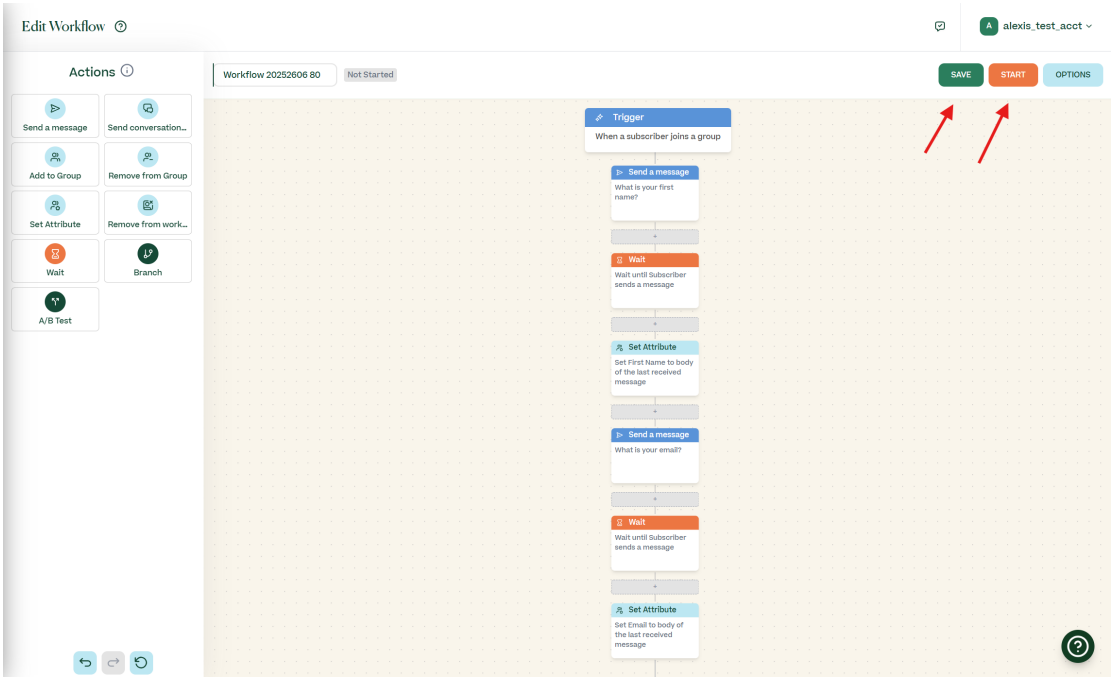
Repeat this process with each “set attribute” action you have set up in your workflow.

Step 4: Save and start your workflow

When you’re finished adding in all of your messages, “wait” actions, and “set attribute” actions, you’re ready to save and start your workflow.

Click the “Save” button to save all the work you’ve done.

When you’re ready to make your workflow live, click “Start.”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Actions
Send a message
Send conversation...
Add to Group
Remove from Group
Set Attribute
Remove from work...
Wait
Branch
A/B Test
Workflow 20252606 80
Not Started
SAVE
START
OPTIONS
Trigger
When a subscriber joins a group
Send a message
What is your first name?
Wait
Wait until Subscriber sends a message
Set Attribute
Set First Name to body of the last received message
Send a message
What is your email?
Wait
Wait until Subscriber sends a message
Set Attribute
Set Email to body of the last received message