How to use the Workflow Builder

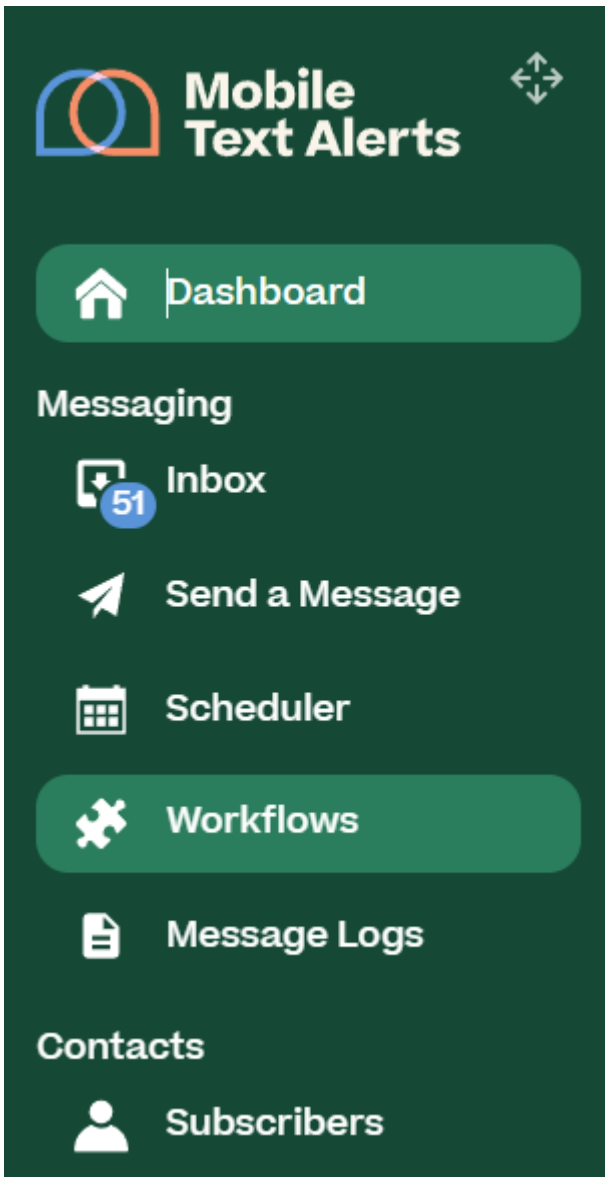
Alexis - 2025-06-26 - Comments (0) - How To Create Workflows

With the Mobile Text Alerts Workflow Builder, you're able to set up SMS automations and campaigns fully customized to your needs.

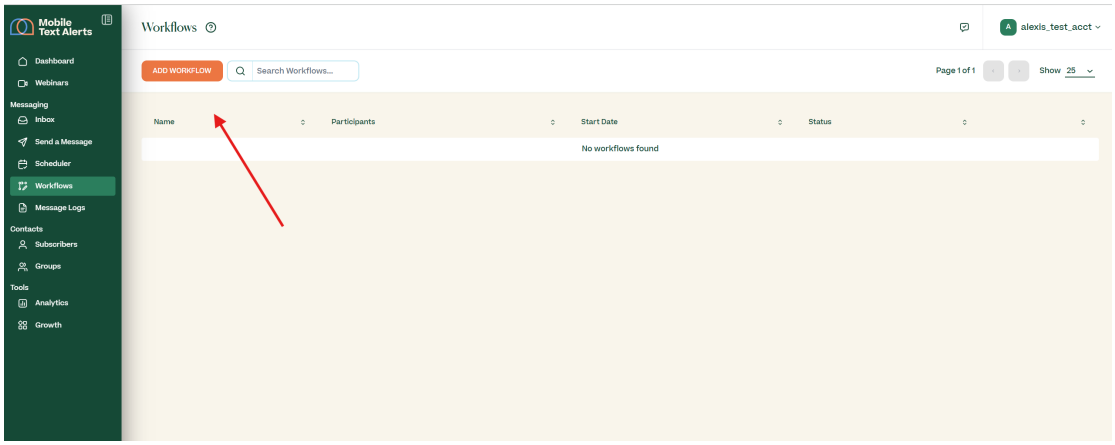
Here's how it works.

1. Add a workflow

First, go to the "Workflows" tab.

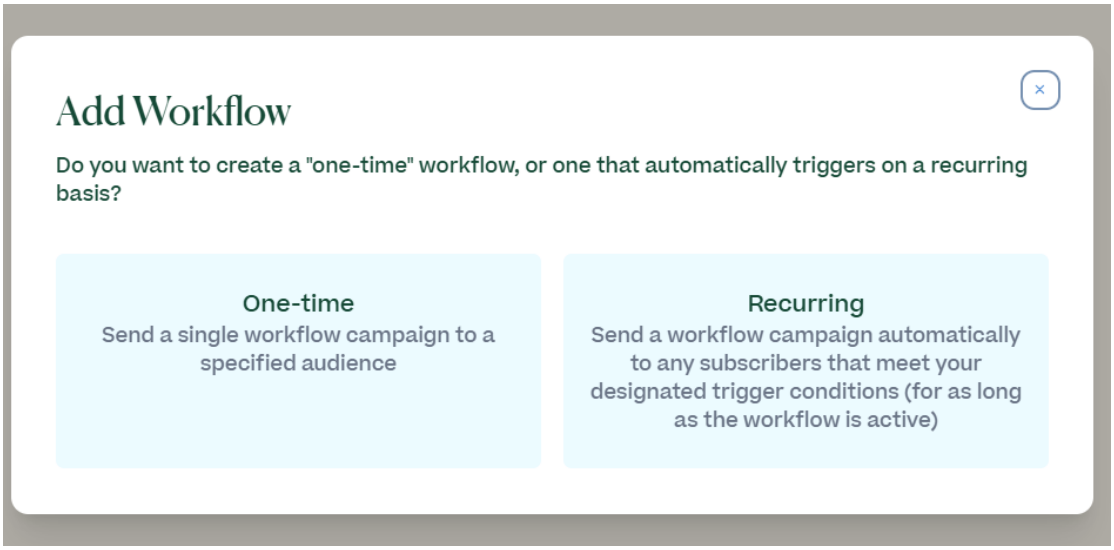


Next, click "Add Workflow."



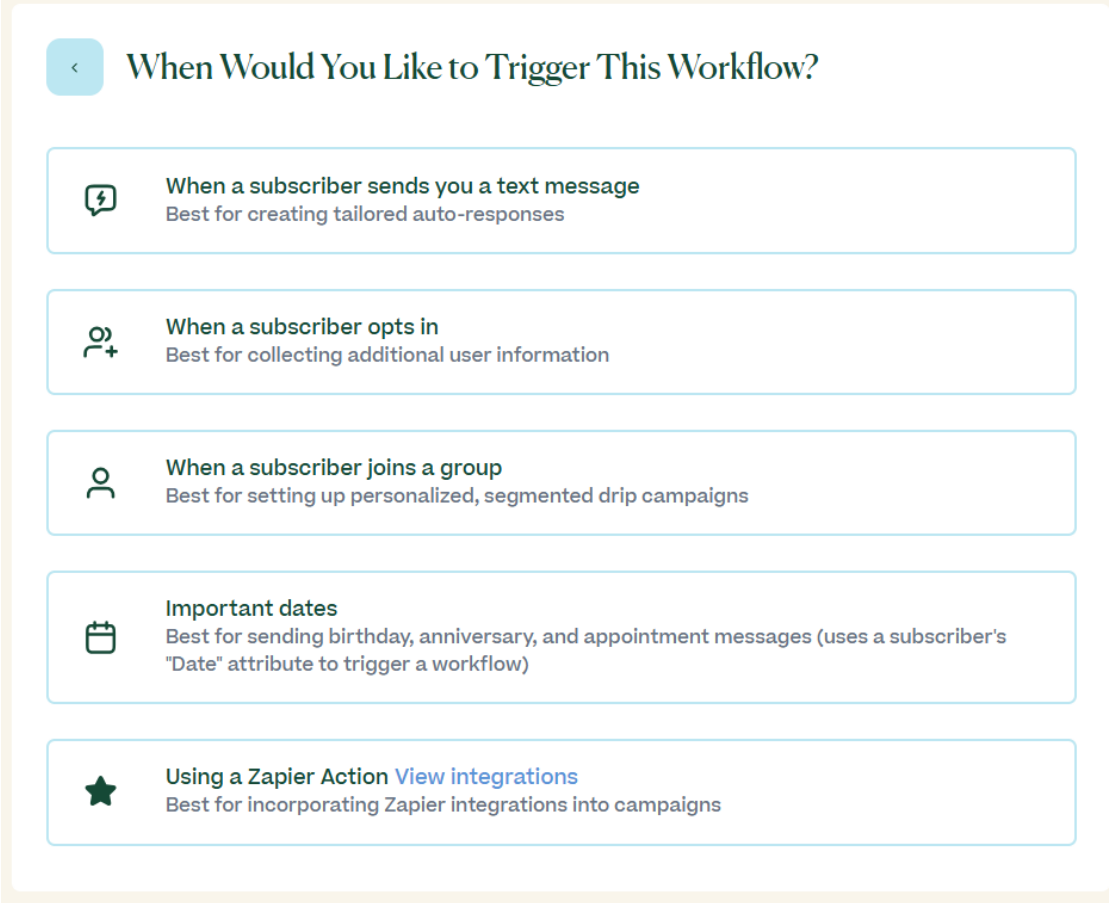
You then need to select whether you'd like this workflow to be a single use flow,

or whether you'd like it to be a permanent ("recurring") flow on your account.



2. Select your trigger

The next thing you need to do is select what you'd like to be the event that triggers the workflow to begin for your subscribers.



Your trigger options are:

- **When a subscriber sends you a text message**: this trigger allows you to designate specific words for your subscribers to text in to your account's phone number. If your subscriber texts in one of these words, they will be automatically added to your workflow.

- **When a subscriber opts in:** this trigger allows you to designate particular opt-in methods (for example, sign-up page or text-to-join keywords). When subscribers opt in to your text message system via one of the designated opt-in methods, they will be automatically added to your workflow.

- **When a subscriber joins a group:** this trigger allows you to designate specific groups on your account. When a subscriber is added to one of those groups, they will be automatically added to your workflow.

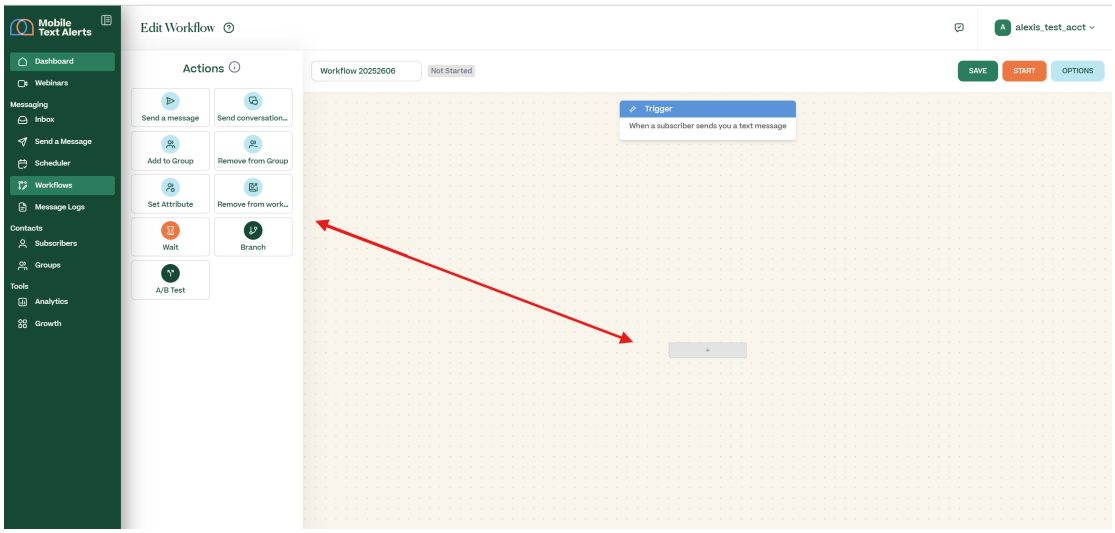
- **Important dates:** this trigger allows you to designate a "date" data point for your subscribers (if you have any data points related to date), as well as a particular time. The workflow will be automatically triggered for individual subscribers on the date and time specified.

- **Using a Zapier action:** this trigger allows you to start your workflow automatically for subscribers whenever a Zapier action is triggered. (You'll need to set up a zap within Zapier using "Enter Workflow" as an action for Mobile Text Alerts within the zap.)

3. Implement your actions

You'll then be taken to the Workflow Builder canvas.

From here you need to drag "actions" into the canvas as desired.



Your action options are:

- **Send a message:** sends a simple message
- **Send conversational message:** sends a message and creates new message branches based on the subscriber's response
    - You can designate the specific responses that you'd like to be the triggers for new branches in your workflow
    - A branch will also be created for if the the subscriber gives no reply within 2 days
- **Add to group:** adds the subscriber to a specific group or groups
- **Remove from group:** removes the subscriber from a specific group or groups
- **Wait:** delays moving the subscriber on to the next step until a specified event happens or until a specified time period passes
    - You can set it to wait until the subscriber sends a message or clicks a link in your most recent message in the workflow
    - You can set it to wait for a particular period of time (in minutes, days, or hours)
    - If you select both "For Event" and "Period of Time," you're able to set it to wait for an event OR for a period of time
- **Branch:** creates two different branches in your workflow based on

conditions that you specify

    - You can trigger the different branches based on subscriber attributes, events in the subscriber's journey, or groups the subscriber is or is not a part of

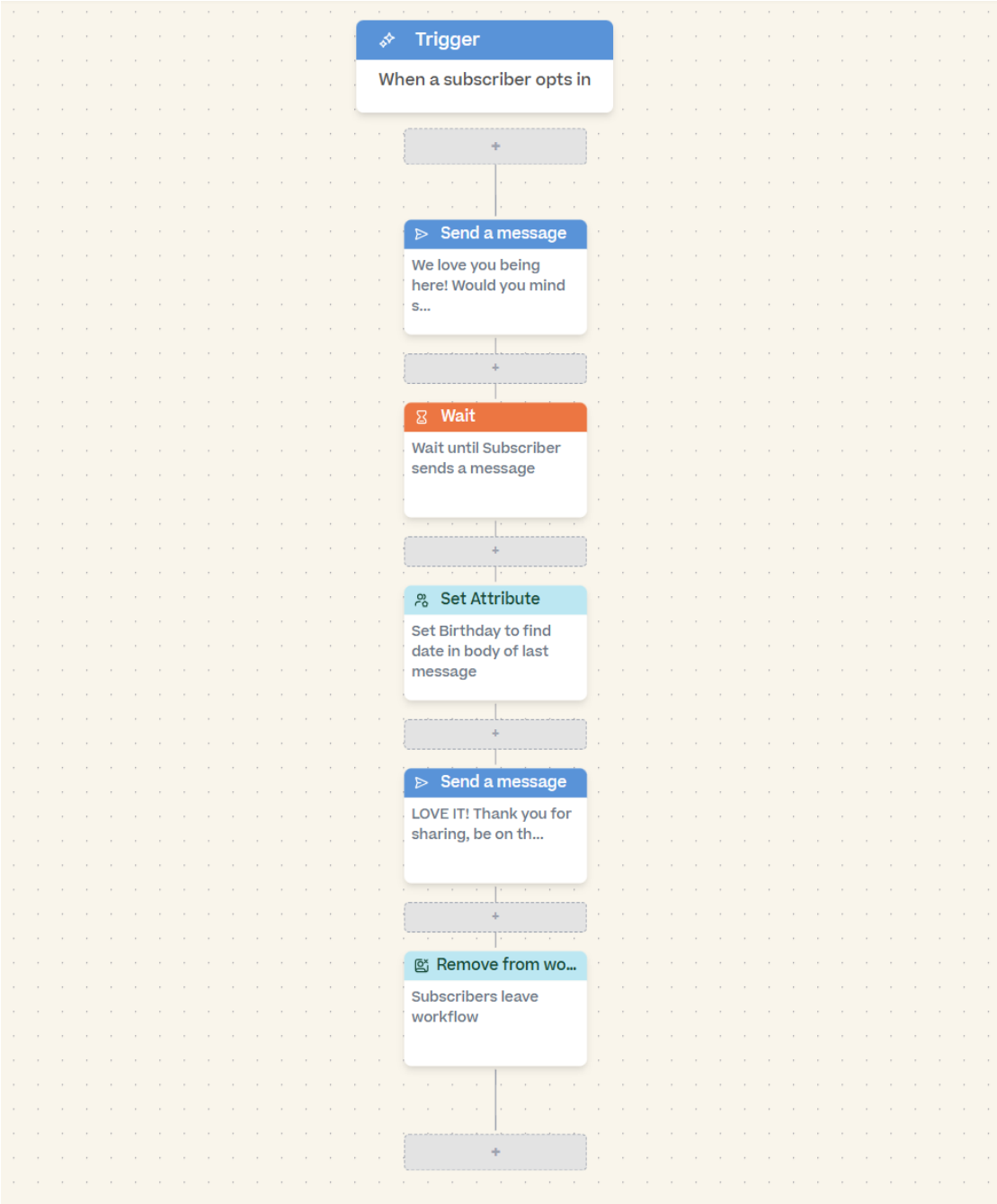
    - Subscribers will then start going down two different paths on the workflow

- **A/B test:** sends a designated percentage of traffic down two separate branches so that you can compare the results

Click the actions within the workflow to make changes to those actions.

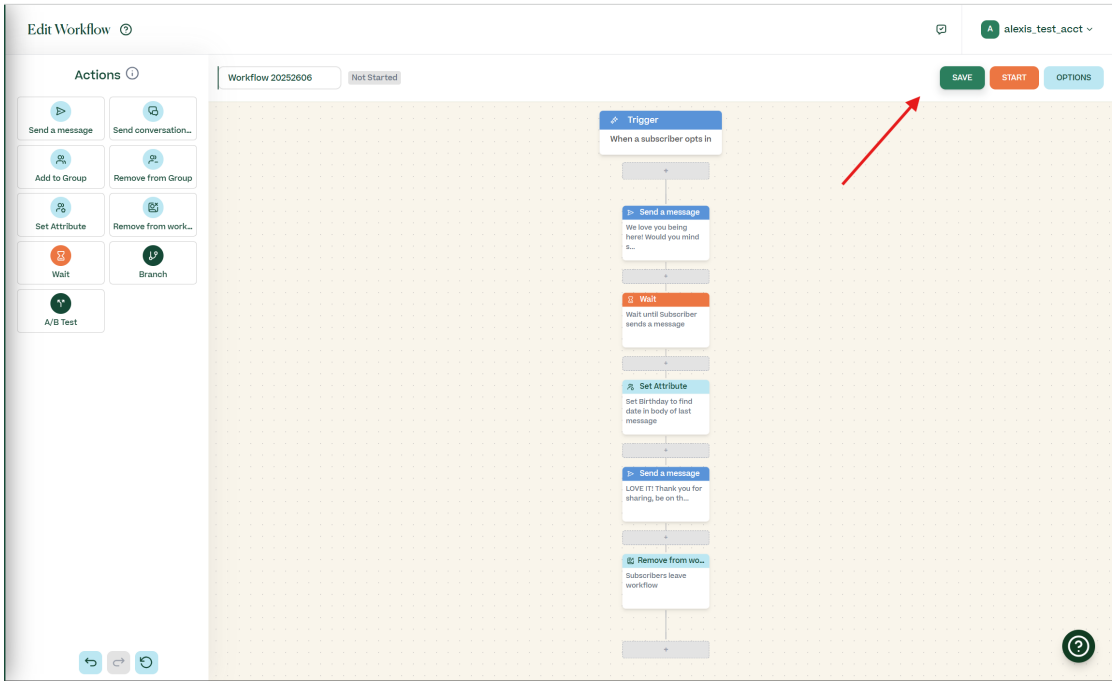
You can mix and match these actions in your workflow however you'd like.

Example:

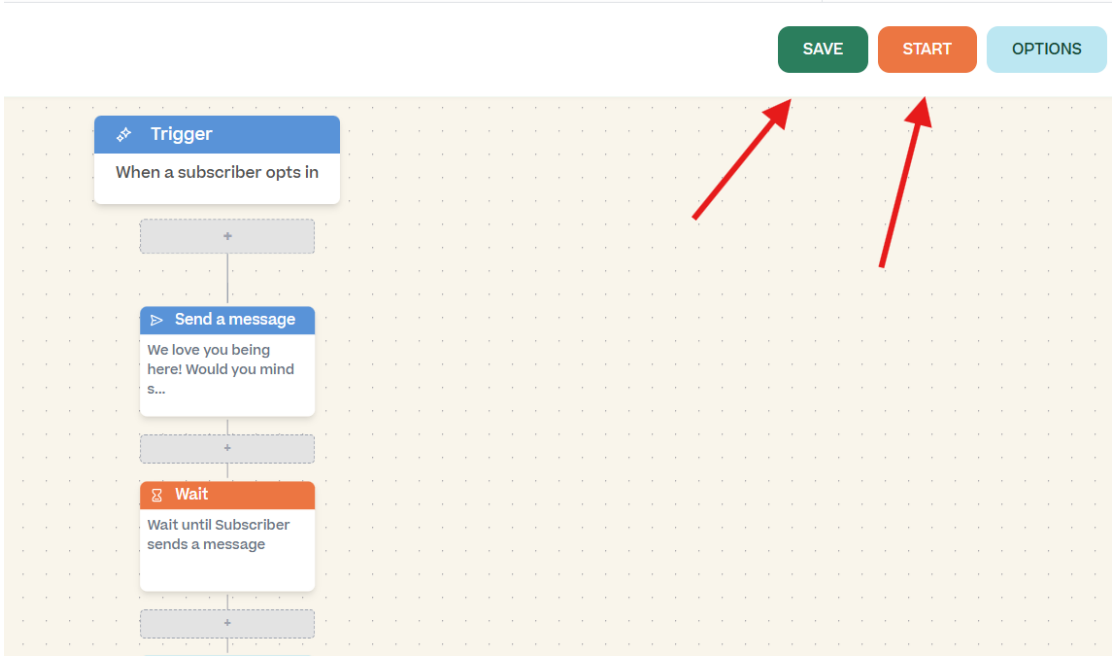


4. Save and start your workflow

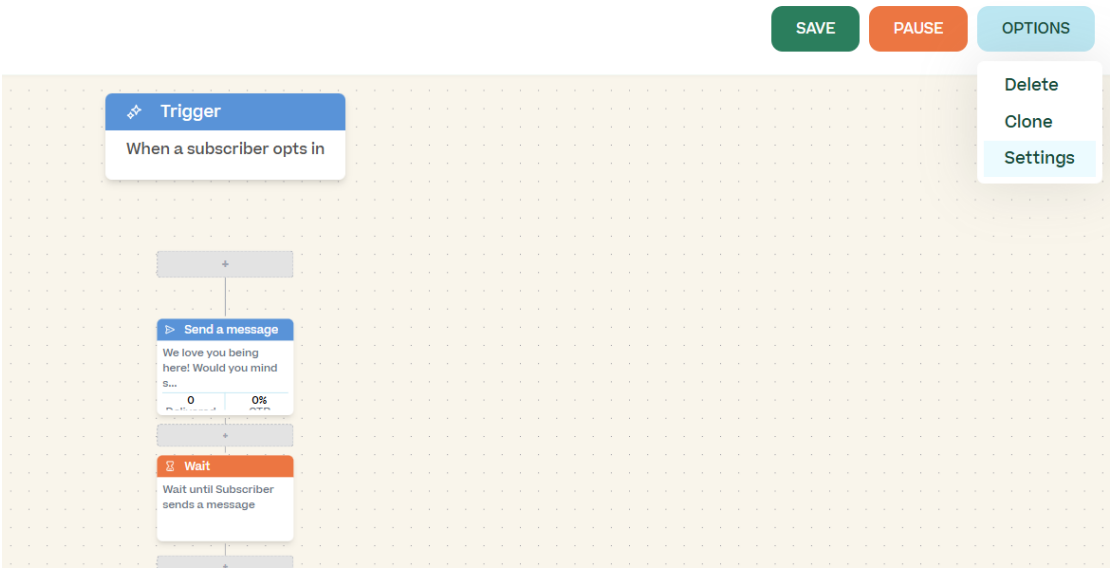
When you're done making edits to the workflow, you can save your changes.



Then you can click "Start" to make the workflow live.



From the "Options" button, you can also click to pause, delete, or clone the workflow. Clicking "Settings" will allow you to designate whether you'd like your subscribers to be able to re-enter the workflow if they meet the trigger conditions again.



You can manage your workflow from the "Workflows" tab.