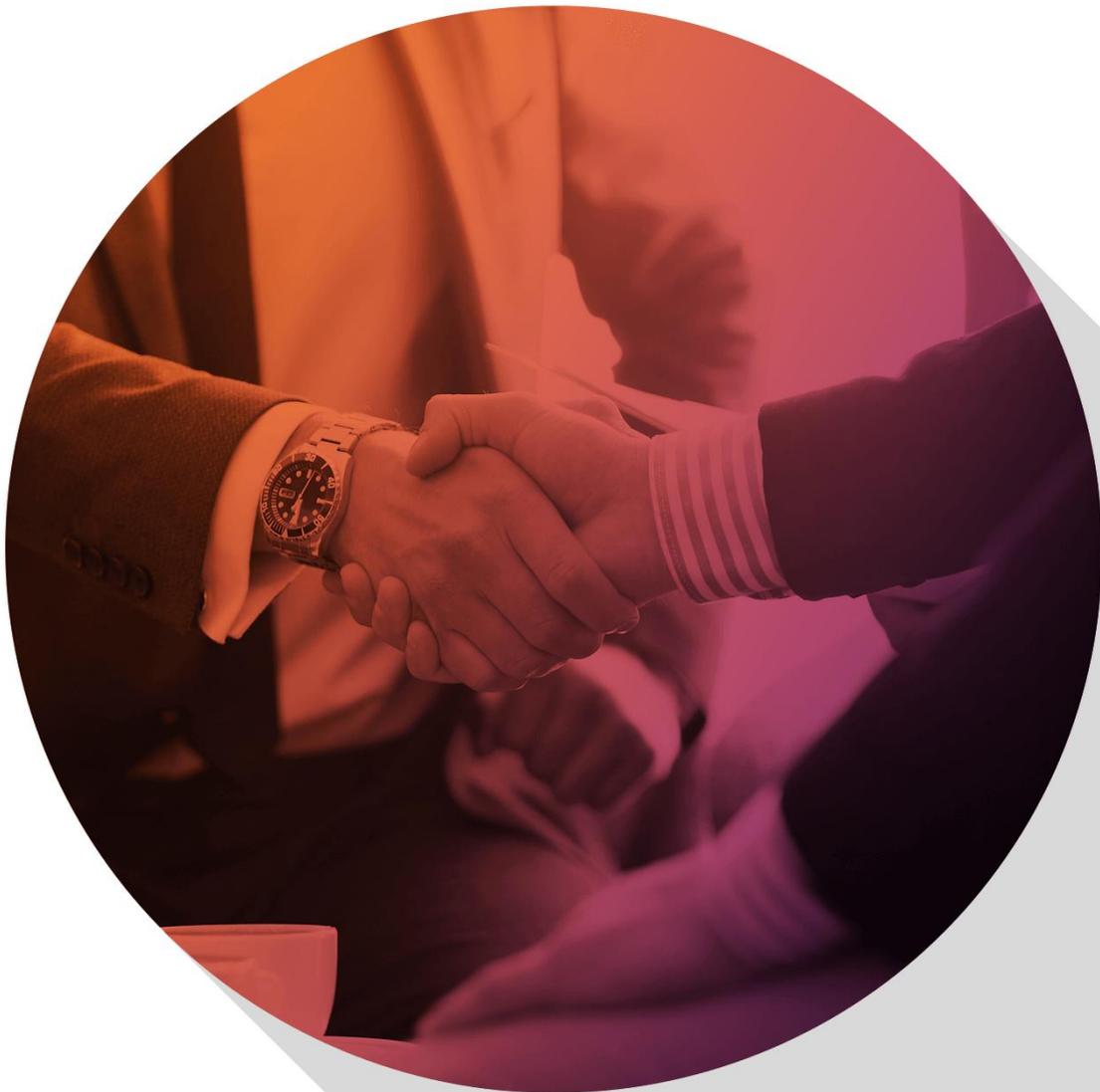


How to...

WELCOME AUTOMATION

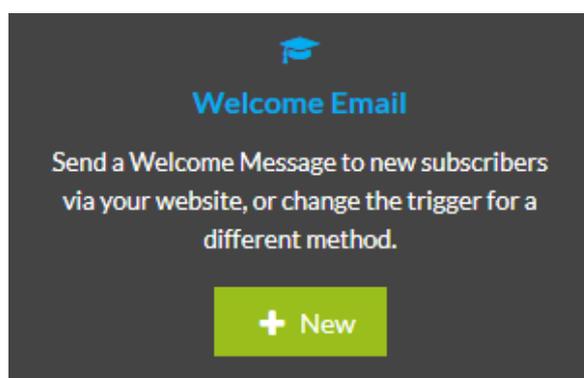


How to... Welcome Automation

Make your own masterpiece for a really positive Subscriber onboarding experience.

1. Choose Preset

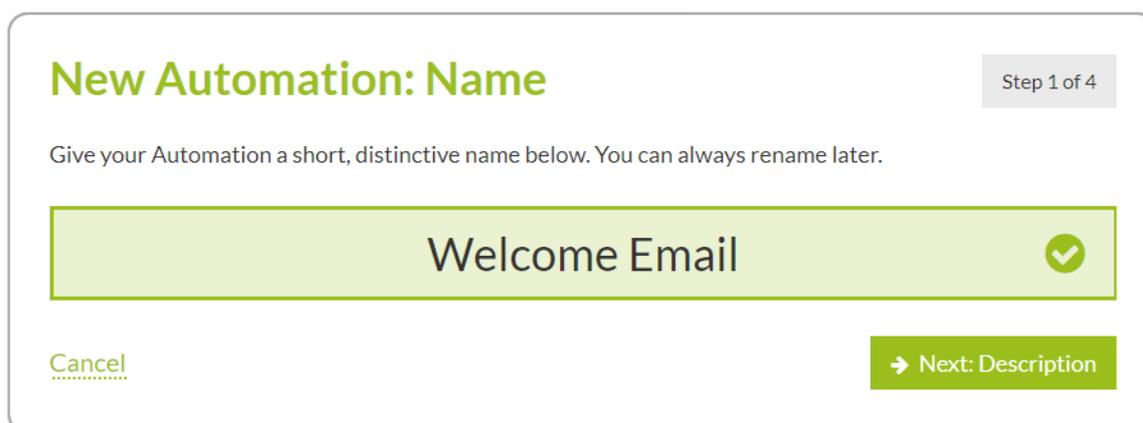
From the Automation Library screen, use the search box to search for “Welcome”. Choose one of the several available Preset options. This guide assumes you’ve chosen the “Welcome Email” in the Education sector, but they’re all quite similar - no matter which Preset you choose, you’ll be guided through the process.



Click the **New** button

2. Fill in the details

Type a new name for your Automation or leave the default one in there



Click **Next: Description**

Type a description if you would find it useful. Again you can leave the default text here, but this and the name can be helpful to remember what your Automation does at a glance. You can edit this information at any time.

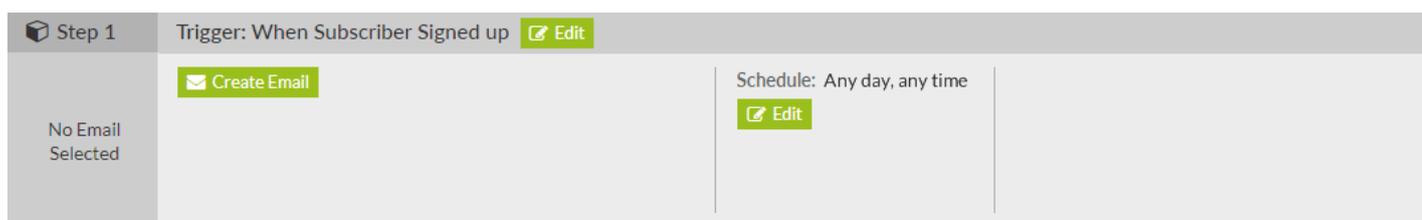
Click Next

Choose an Audience for your Automation. This can be a Group, Segment or All Subscribers, depending how focused you need to be. Choose carefully, **this cannot be changed**. See our [How to... Automation Audience](#) guide for more information.

Click Next

3. Steps and Triggers

In your Workflow you'll see a single Step with the option for up to 4 more. For a simple Welcome Email, you only need to fill in details for one Step and that's all we'll cover in this guide, but to make more simply click "Add Step" and repeat the process for setting a Trigger, creating an Email and Scheduling if applicable.



Step 1	Trigger: When Subscriber Signed up Edit
No Email Selected	Create Email Schedule: Any day, any time Edit

The Trigger for our Step will already be set to "When Subscriber Signed up". This assumes you have a form in place on a webpage (or intend to make one!) – see our [How to... Account Signup Form](#) guide for details on creating a form.

With this Trigger Type, the email you create on this Step will be sent to a Subscriber either:

- When they submit the form on your webpage (if you do not have the Double Opt-in setting switched on in your account)
- or
- When they submit the form on your webpage and then, having received a Double Opt-in email, have clicked to confirm they wish to be subscribed to your account.

See our [Settings guide](#) for more information about the default NewZapp Double Opt-in setting.

You can leave this Trigger as is, or if you click the "Edit" button next to it, you can change its Type or Properties using this modal which will open:

Edit Trigger: Subscriber Signed up

Choose Trigger
Trigger Properties

When a Subscriber is added to your Audience (👤 Website Signups)

Choose Source

Manually Added
Imported
Opted-in
Signed Up
Via API

Delay

Run hour(s) after

[Cancel](#)
Save

For example, in the Properties tab, you could change the Source from “Signed Up” to “Imported” – say if you don’t have a form and want Subscribers to be sent a welcome email after you import them into the specified Group in your account.

Once you’ve edited a Trigger to your satisfaction, click the **Save** button to close the modal and save your changes

4. Create Emails

Click the **Create Email** button towards the left of the Step. This takes you through Email Details, Pick Template and Add Content – just as if you were creating a “normal” non-automation Email in Create & Send.

If you get stuck on anything during this process, you can find out more in our [How to... Email Details](#) and [How to... Blocks](#) guides.

After you’ve created your Email, click the **Finish & return to Steps** button top right. You’ll now see a thumbnail image of your email on the left of the Step, and the email details.

Step 1 	Trigger: When Subscriber Signed up Edit Email: Thanks Edit Send Proof Delete Email Subject: Thanks for signing up From Name: Adventure Time From Address: hello@adventuretime.net	Schedule: Any day, 10:25-15:42 Edit	Step statistics: View Report <table style="width: 100%; text-align: center;"> <tr> <td>4512</td> <td>65%</td> <td>32%</td> <td>1%</td> </tr> <tr> <td>Sent</td> <td>Opened</td> <td>Clicked</td> <td>Bounced</td> </tr> </table>	4512	65%	32%	1%	Sent	Opened	Clicked	Bounced
4512	65%	32%	1%								
Sent	Opened	Clicked	Bounced								

There's also a **Send Proof** button for you to send yourself a copy to check. This won't affect your Automation stats, and won't appear in the Automation Report or in your reports in Track.

You've now got enough settings in your Automation to set it running, but hold your horses; do you want to Schedule the emails that the Automation step sends out?

5. Schedule and Go!

If so, click the **Edit** button in the Step's Schedule section, and change the days and times that the Step's Email is allowed to be sent. See our [How to Schedule a Step guide](#) for more information

Edit Schedule

Limit times and/or days when your email will be sent, regardless of when trigger conditions are met.

Day

Any day

Only on selected day(s):

MON TUE WED THU FRI SAT SUN

Time

Any time

Between and

[Cancel](#) [Save](#)

When you're happy with your Steps (or in this case, single Step), click the **Start Automation** button in the top right to set everything in motion. Or if you're not quite ready to light the blue touch paper and want to save your work, click the **Close** button next to **Start Automation**. Everything will be saved but the Automation will still be paused.

For more information on getting the most from your NewZapp account, visit our [Knowledge Base](#) or contact us on support@newzapp.co.uk.