Build and manage workflows

Mailvio Automation is meant to make email marketing easy. With a workflow in place, you can systematize your sending by setting up certain activities like adding tags, setting conditions and sending to people that engaged with your email.

Here's how you create a workflow:

Step 1: Log in to Mailvio.

Step 2: Go to Automations tab and click on Create Automation button.

Step 3: Select if you want a pre-built automation or to customize your own.

Step 4: Rename your automation.

Quick guide:

1. Activate - Toggle that turns the automation on/off

2. Options - Allow deleted subscribers in the workflow,

3. Save - Save changes to the automation

4. Save and exit - Save the changes and exits the automation page

5. Option to Zoom in and out

Step 6: Set a trigger by clicking on Define a Workflow Trigger and selecting a trigger from the Initial Trigger list. Take note, multiple triggers can be added.

Step 7: Click on the icon to add a new step. Choose from the listed options and don't forget to hit save. Feel free to add steps in between actions by clicking on the icon.

Step 8: Activate workflow by toggling Activate on. Choose if you want to add new or existing contacts to the workflow.

Step 9: Once activated, you will have the option to Add Contacts and Pause the workflow.

Step 10: Once you exit the workflow builder, you'll find the newly created workflow under Automations.

Congratulations! You have successfully created a workflow. If you have further questions, please reach out to us here.

Unique solution ID: #1019
Author: Mailvio Support
Last update: 2026-10-13 01:47

© 2026 Mailvio <support@mailvio.com> | 2026-11-28 04:05
URL: https://support.mailvio.com/content/4/20/en/build-and-manage-workflows.html