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Tip of the Week 96: How to Set Up Workflow Triggers Correctly

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Workflow triggers determine **when an automation should start**. Choosing the right trigger is important, but applying the correct filters is just as important. If filters aren't configured correctly, your workflow may trigger for the wrong contacts—or not trigger at all.

Creating a New Workflow

1. Go to **Automations**.
2. Open the **Workflows** tab.
3. Click **Create Workflow** to build a new workflow, or open an existing workflow to edit it.
4. Click **Add New Trigger**.

Finding the Right Trigger

There are many available workflow triggers. Instead of scrolling through the full list, use the search bar to quickly find what you need.

For example, you can search for:

- **Opportunity** to view opportunity-related triggers.
- **Task** to find task automation triggers.
- **Appointment** for appointment-based workflows.
- **Form** for form submission triggers.

Searching makes it much easier to locate the correct trigger for your automation.

Always Configure Trigger Filters

Selecting the trigger is only the first step. Most triggers include **filters**, and these determine exactly when the workflow should run.

If filters are left blank or configured incorrectly, your workflow may:

- Trigger for the wrong contacts.
- Trigger for every event (i.e. form submission) instead of a specific one.
- Fail to trigger when expected.

Always review the available filters before saving your trigger.

Example #1: Appointment Status Trigger

If you're using the **Appointment Status** trigger, you'll see several filter options.

Common filters include:

- **Event Type**
- **Appointment Status**
- **Calendar**

For example, if your workflow should only run when an appointment is **Confirmed** on your **Athlete Check** calendar, make sure all of those filters are selected.

Note: If your calendar uses recurring appointments, be aware that recurring events behave differently from normal appointments. If the Event Type filter doesn't match the appointment type, the workflow may not trigger as expected.

Example#2: Form Submitted Trigger

Another common workflow trigger is **Form Submitted**.

If you simply add the trigger and save it **without selecting a specific form**, the workflow will run whenever **any form** is submitted.

Gym Lead Machine will display a warning indicating that **no filters have been applied**, helping you identify this before publishing.

Instead, select the specific form you want the workflow to monitor.

For example:

- Website Form
- Pricing Form
- Lead Magnet Form

Once selected, the chosen form will appear as a filter on the trigger.

Best Practices

Before publishing any workflow:

- Choose the correct trigger.
- Review every available filter.
- Confirm the workflow only runs for the intended event.
- Test the workflow to verify it behaves as expected.

Taking a few extra moments to configure your trigger correctly can prevent unexpected automation behaviour later.

Need Help?

If you're unsure which trigger or filters to use, the support team is happy to help you choose the right setup for your workflow. Just send an email to hello@usekilo.com.

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