To create an automation on VBOT, visit your automation tab from the left, and on this view you can create an automation which is blank or choose from the library that we've assembled for you.

Now note that these templates will need to be configured once you choose from any of these, including the messages, the logic, and of course the trigger criteria.

You can always continue editing what you've started, which I'll do right now.

The first thing I always begin with is the proper naming for the automation, things that you'll remember down the road so you're not wondering what this is about.

You're going to end up building a lot of automation, so might as well label things properly.

Let's just call it testing for course.

On the left you see all your triggers.

Triggers are what begin the automations.

The automation needs a trigger to start.

They're square shaped and they're broken down by email, SMS, e-com, user behavior, time, triggers, external APIs, and you just have a note section so you can leave some ideas to yourself or to your team on what you're working on here.

This doesn't execute anything, it's just for visual cue.

Then you have actions.

These are the things that happen the moment you create a trigger.

What do you want to do if somebody opens an email? You're going to send one email the first five minutes in SMS, notify teams, and do all that stuff.

I'm going to be covering and unpacking every one of the triggers and actions in the following modules.

On the bottom right you have a zoom in and zoom out feature which lets you just have a better handle on the view.

It comes handy if you have very long automations.

You even have show statistics which lets you get a visual on how many people on a specific stage of this workflow.

The top right is where your housekeeping stuff.

You can always call up on support via chat.

You can access our self-help library right here.

You can save and exit or switch automations.

You can even go back in time for pre-saved automations as you're working because people make mistakes and they use this often to roll back in time.

I'll go ahead and choose one that the system pre-saved for me.

It's right here.

I'm going to zoom out a little bit and this view comes handy.

I want to explain a few things.

I have on the screen two different workflows.

This is when we say workflows or drips.

This is pretty much what it is.

Workflow number one, it's beginning when someone opens an email.

Workflow number two is when somebody joins or fills out a form.

The one on the bottom is branching out.

This one is going in two directions and when you get to the sync to third party it's branching out again.

Understand what branching means is you're getting to a point and you're just going into two different routes.

This one has delays, meaning I can delay in action for two days at 7 AM at this particular stage.

After that I'm continuing the flow.

I can of course build this indefinitely.

I can have this run for a week, a month, a year, and even a decade if I want to.

Another thing worth noting is that these arrows include filters on them.

If I double click them I can actually add some conditions which will force only users that match these conditions to go forward.

I can say only let people in where the VIP tag on their profile go through that route.

You can do it here, you can do it on arrows down the road, and you can even do it on the trigger which is the gate, the beginning of it all.

If you do it on the trigger obviously you're going to weed out any lease that do not match this criteria under the target segment.

The trigger criteria is just the basic setup.

I'm going to be covering them in the next module.

If I go to the shroud, if I don't have any filters on the trigger I might not match this tag name but I can just continue to go on the bottom route.

Something on the screen is configurable.

I can double click on email and I can choose what email to include or create one from scratch including allowing people to get that same email twice.

This prevents duplicates if you don't want or actually purposely if you want to send the same email to someone who follows the form over and over, this is how you can control that.

It's very easy to use.

The last thing here is how the logic flows.

The system always follows the arrow direction.

If I zoom in a little bit, I'll show you what I mean.

Right now it's beginning here but I can click on that arrowhead, link it to Notify Team.

That's what happens next.

From Notify Team I'm adding a tag.

From a tag I can go to also Notify Team again.

Obviously this is not too logical here just for sample but always follow the arrow and the system doesn't really care if you're going left to right, right to left, top bottom as long as you're just going by the arrow side.

So the system will always flow that way and the difference is a certain amount of minutes in between.

Also note some people like to keep things linear in one line and that's totally fine.

Because they like to branch out because either they have rules or they want to build some internal notifications separate from front facing notifications.

So if that's the way you like the logic to be built, this is your playground adopted for your own use.

The next module I'm going to unpack the triggers and all the different options available there.