Setting Up Alerts in Your Routing Form

Adding alerts to your Routing Form can help keep your team informed when important interactions occur. For instance, if a visitor reaches a specific part of the form or answers a key question that suggests they are a strong lead, you can trigger an internal email to notify the relevant team members. This allows your sales or other teams to take timely action, even if the visitor doesn't complete the form or book directly.

Internal email alerts are fully team-facing, meaning visitors won't know about these notifications or receive any emails related to them. The alerts are strictly for internal updates.

Why Use Alerts in Your Routing Form?

Adding alerts ensures that:

- Your team is notified of high-priority developments immediately.
- No important leads slip through the cracks.
- Team members can take proactive steps based on key visitor interactions.

How to Add Alerts in Your Routing Form

Follow the steps below to add alerts in your Routing Form:

Navigating to the Flow Builder

1. Click on **Routing Forms** in the left-hand navigation menu.
2. Select the form you want to set up alerts for.

Setting up the Alert

1. Add the **Email alert** action from the **Add Interaction** pane on the right.
2. Provide the **Subject** line for the email that will be sent (**Optional**).
3. Provide a **Description** to be included in the email (**Optional**).
4. Select who should get the alert from the **Recipients** dropdown menu.
5. Click on **Save**.