

How to Delay Workflow Steps

Using the Delay Step in workflows

Sometimes it's beneficial to add a delay between workflow steps. This helps stagger actions and creates a more natural experience for recipients—especially when sending communications or triggering follow-up steps.

The **Delay Step** allows you to define when the next step in the workflow will execute. This can be based on a set interval, a specific date and time, or a relative point in time (like "tomorrow").

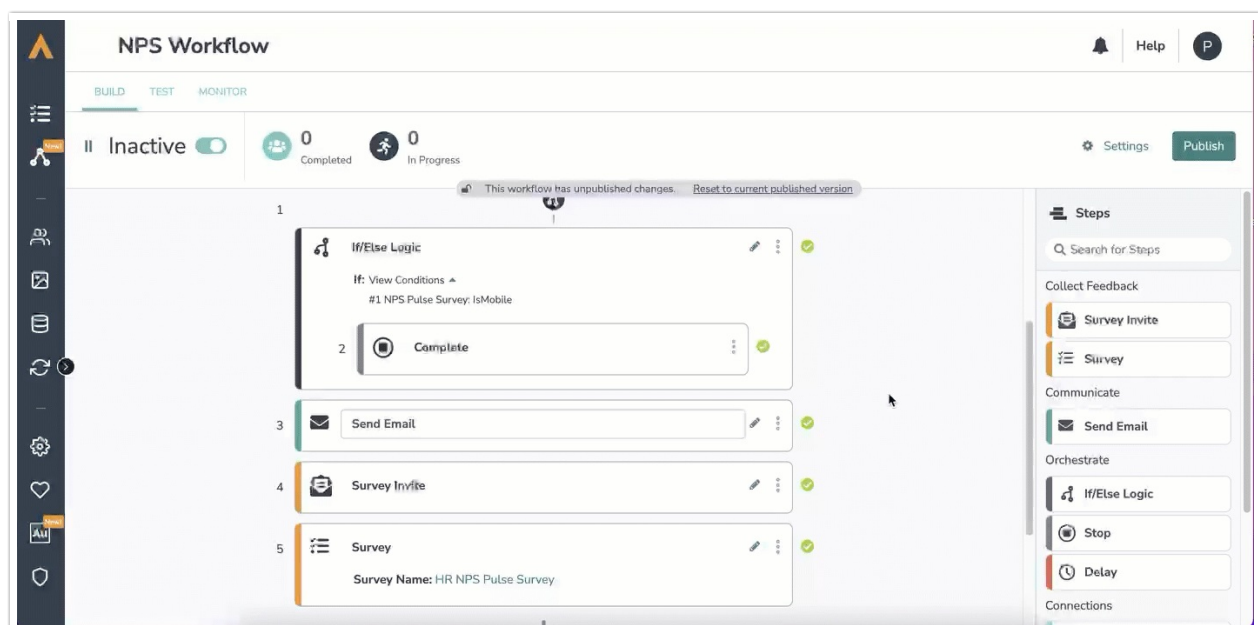
Delay Step requirements

Keep the following rules in mind when using a Delay Step:

- A Delay Step **cannot** be placed before a **Survey Listener** or **Share Link** initiator.
- A Delay Step **cannot** be the **last step** in a workflow.
- You **cannot** place two Delay Steps back-to-back.
- **Units of time** must be positive whole integers (e.g., 1, 2, 3). No decimals are allowed.
- **Minimum delay** is 1 minute; **maximum delay** is 1 year.

How to add and configure a Delay Step

1. **Drag** a Delay Step from the step list (on the right side of the screen) onto your workflow timeline.



2. Click the pencil icon to edit the Delay Step.

3. Choose how you'd like to define the delay:

- **Interval** (e.g., 3 days, 1 week)
- **Absolute timestamp** (e.g., December 10, 2025 at 8:00 AM)
- **Relative time** (e.g., “tomorrow” or “now”)

4. You can also use **merge codes** to dynamically set the delay time based on previous responses or system values.

5. When using **relative time**, the system accepts inputs like “now”, “tomorrow”, or specific timestamps.

Note: Workflow steps set to send "X days after" the last step are not guaranteed to send at the exact time of the previous step. After the delay period ends, the next step will be added to a processing queue.

Testing workflows with Delay Steps

When running a test, you have control over whether the Delay Step is applied:

- In the **Test tab**, toggle **Yes** or **No** to include or skip the delay.
- If set to **Yes**, the test run uses a default delay of **1 minute**.
- If set to **No**, the Delay Step is skipped entirely during the test run.

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