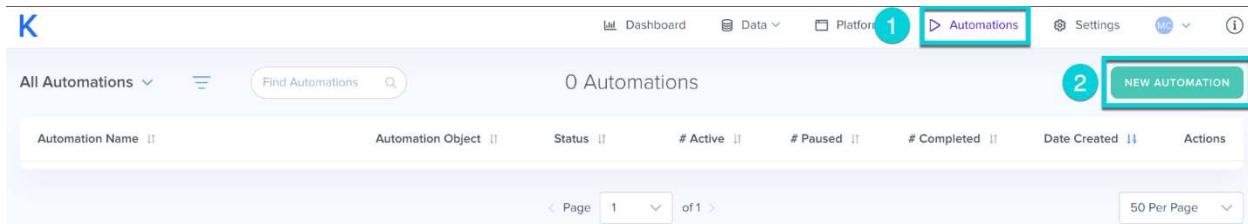


Add New Automation

To add an Automation, follow these steps:

1. Click **Automations** from top menu bar

2. Click **New Automation**



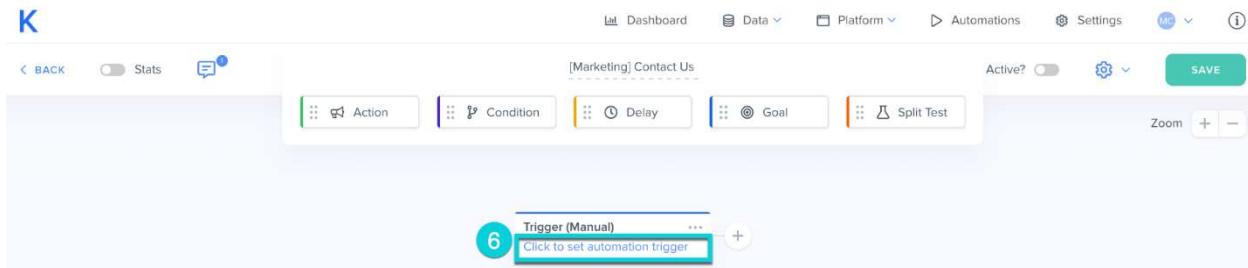
3. Enter the **Automation Name**

4. Choose **Automation Object** (for most automations, you will choose **Contacts**)

5. Click **Save**

A screenshot of a 'Add Automation' dialog box. The title 'Add Automation' is at the top right with a close button. On the left, a vertical grey sidebar has three numbered circles: '3' above the automation name field, '4' above the object selection field, and '5' next to the 'SAVE' button. The automation name field contains '[Marketing] Contact Us' and is highlighted with a red box. The 'Choose Automation Object' dropdown menu is open, showing 'Contacts' and a dropdown arrow, also highlighted with a red box. The 'SAVE' button is at the bottom right, also highlighted with a red box.

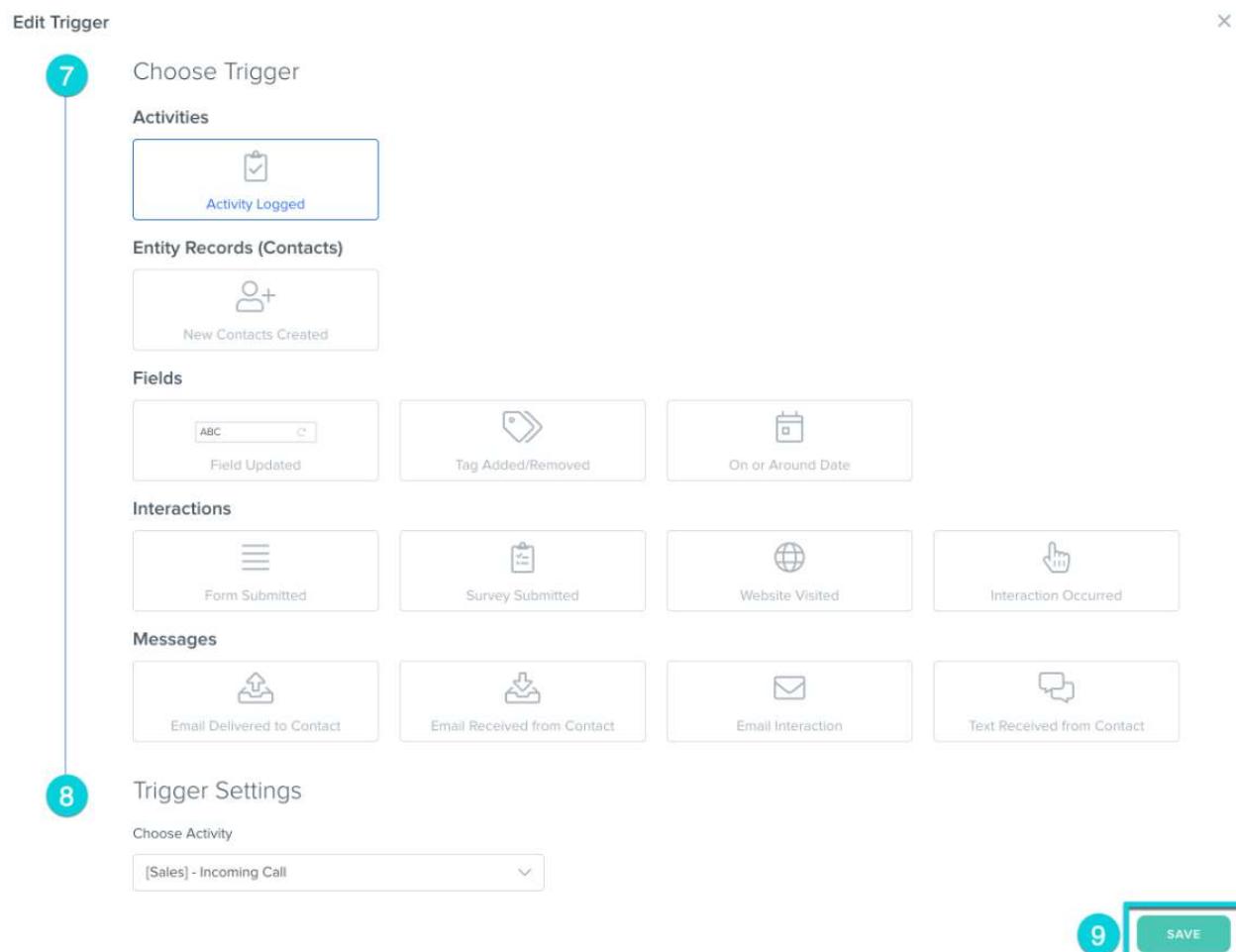
6. In the **Trigger** step, select **Click to set automation trigger**



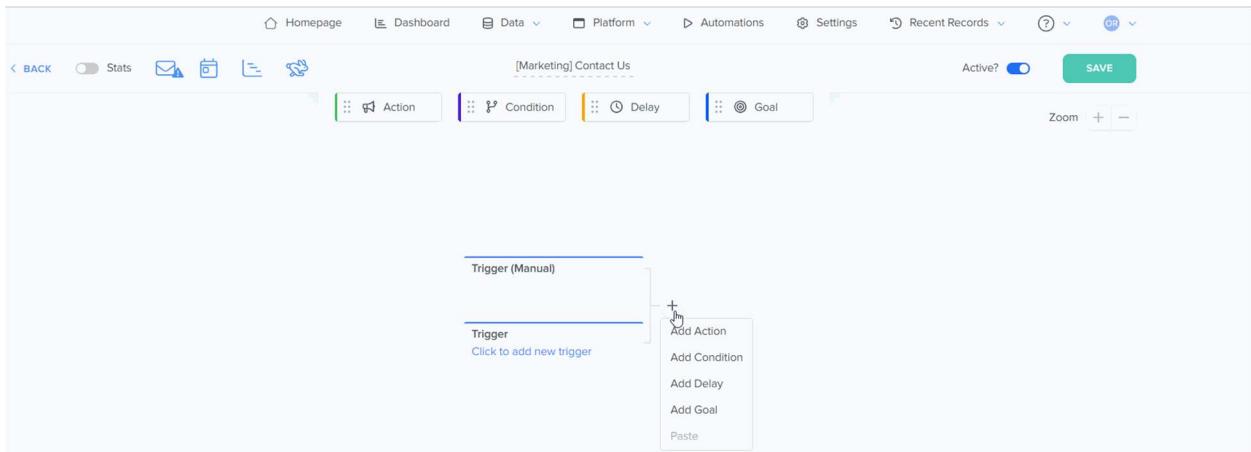
7. Choose the Trigger you would like to pair with the automation

8. Complete the **Trigger Settings** (the available options will differ based on the trigger you have chosen)

9. Click **Save**



10. Build out your Automation by clicking the "+" or clicking and dragging [Actions](#), [Conditions](#), [Delays](#), [Goals](#)



11. When the automation is complete, click **Save**

12. Once you are ready for your automation to run, update the **Active?** Toggle

Note: Until you activate your automation, it will be saved, but will not run

