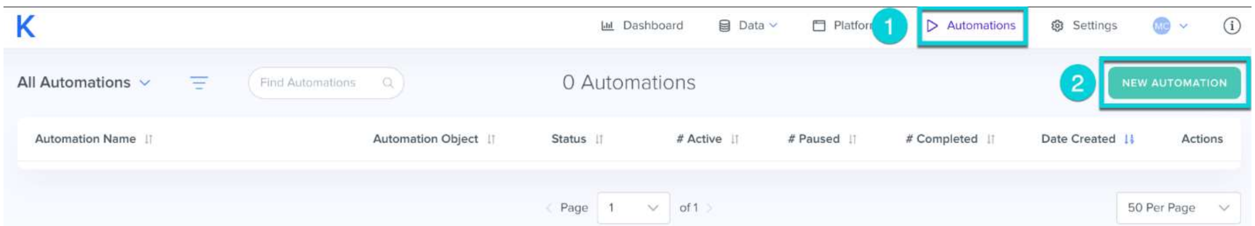
Add New Automation

To add an Automation, follow these steps:

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

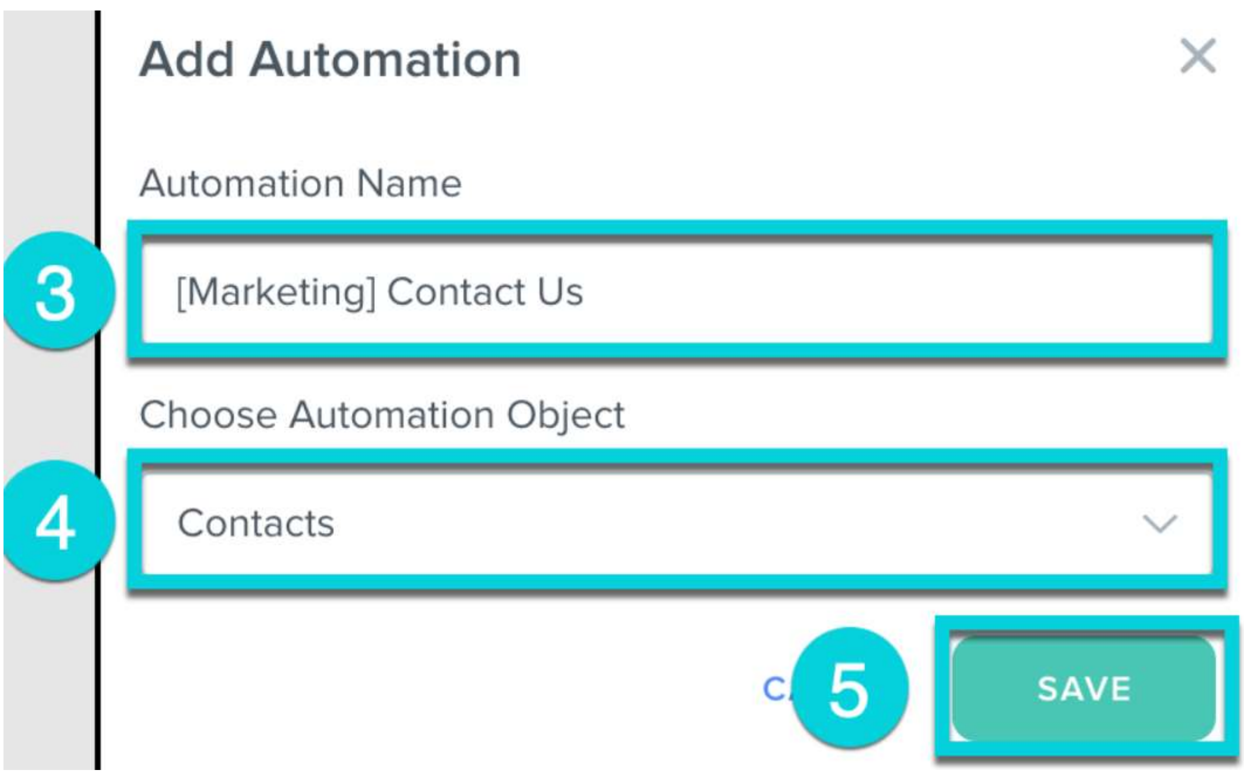
2. Click **New Automation**



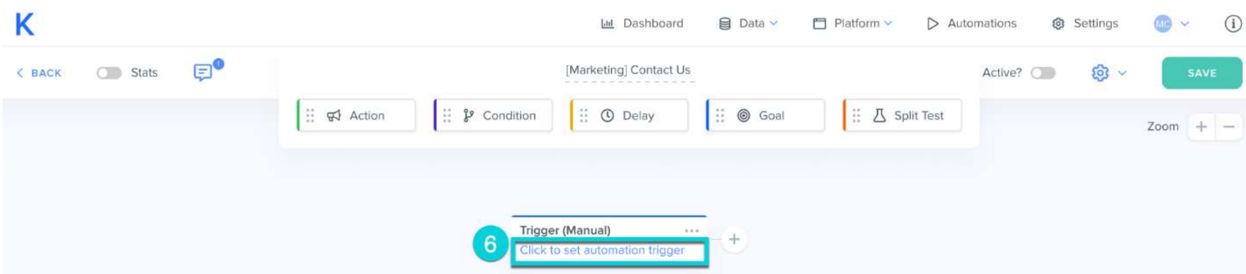
3. Enter the **Automation Name**

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

5. Click **Save**



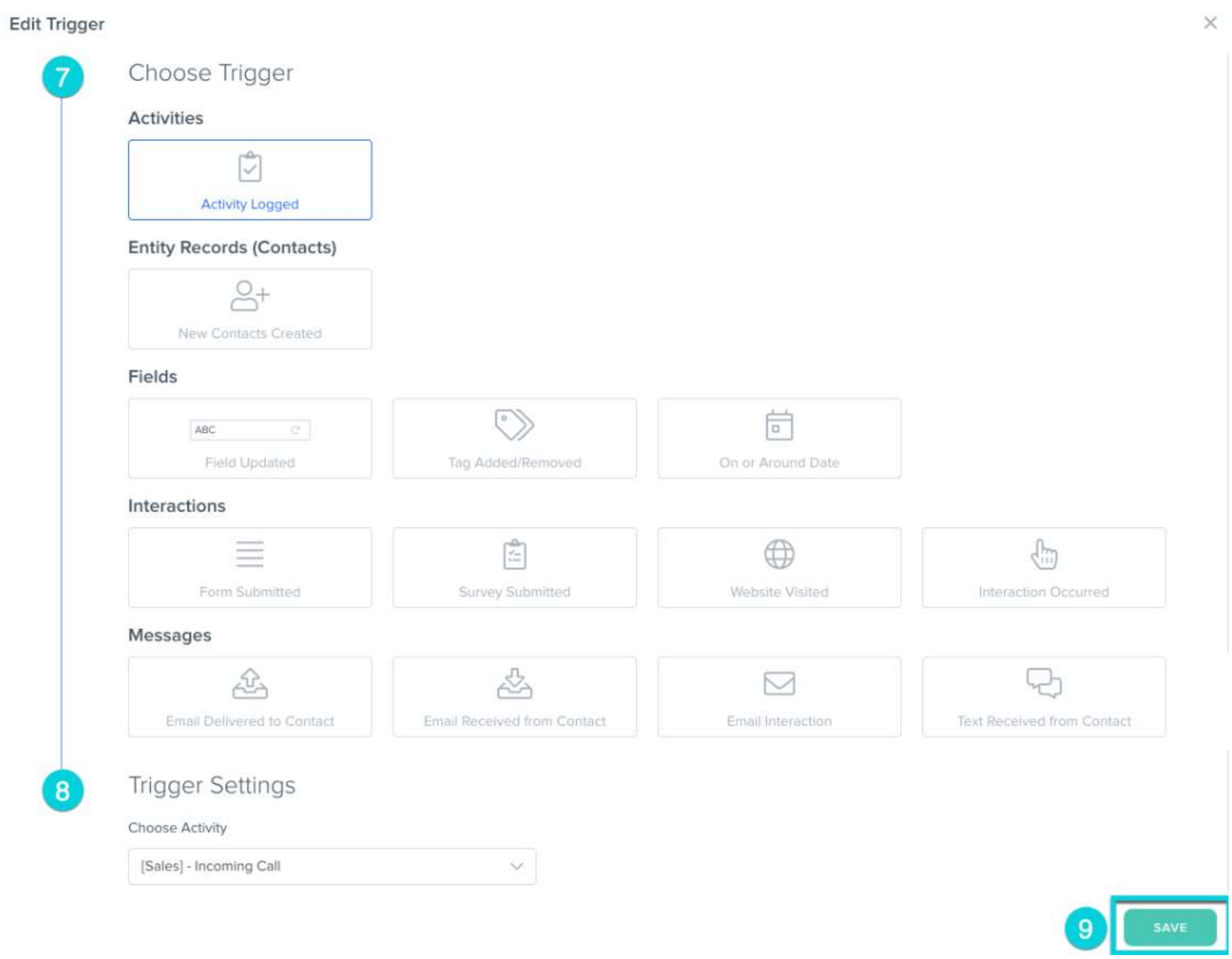
6. In the Trigger step, select **Click to set automation trigger**



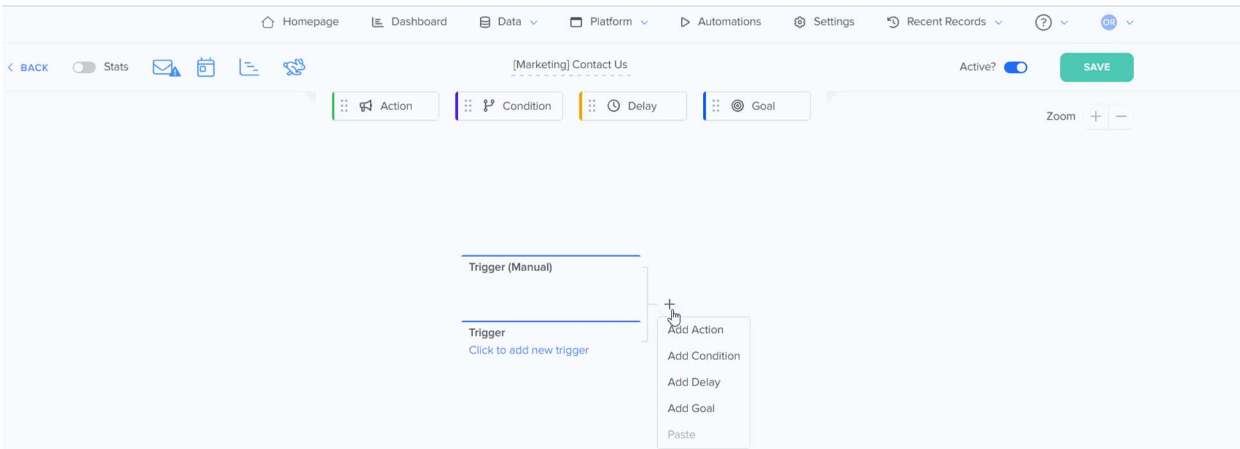
7. Choose the Trigger you would like to pair with the automation

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