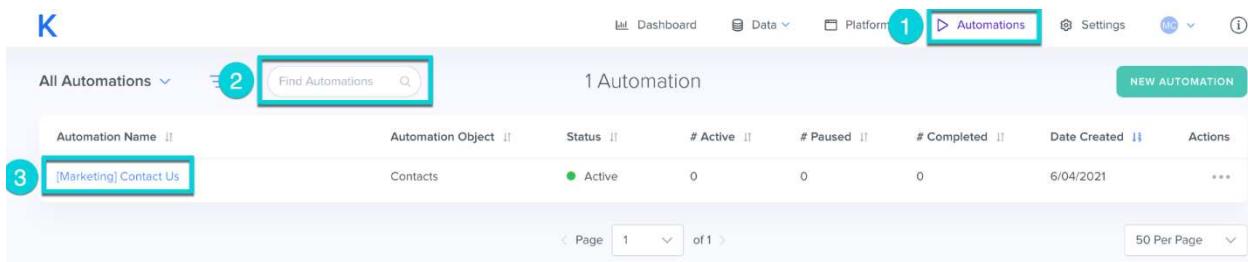


Edit Existing Automation

To edit an Automation, follow these steps:

1. Navigate to Automations tab from the top menu bar
2. Search for the Automation you would like to edit
3. Click on the Automation Name



The screenshot shows a CRM application's Automations list. At the top, there are navigation links: Dashboard, Data, Platform, Automations (which is highlighted with a teal circle and labeled '1'), Settings, and Help. Below the navigation is a search bar with the placeholder 'Find Automations' and a magnifying glass icon. The main area displays a table with one automation entry. The table columns are: Automation Name, Automation Object, Status, # Active, # Paused, # Completed, Date Created, and Actions. The single row shows 'Marketing Contact Us' as the Automation Name, 'Contacts' as the Automation Object, 'Active' as the Status, and 0 for all other metrics. The Date Created is 6/04/2021. The Actions column contains a three-dot menu icon. At the bottom of the table are pagination controls ('Page 1 of 1') and a '50 Per Page' dropdown.

4. Make the necessary changes:

- 4.1 Follow the steps to [edit the existing step](#)
- 4.2 Follow the steps to [reorder existing steps](#)
- 4.3 Follow the steps to [delete the existing step](#)
- 4.4 Follow the steps to [add a new automation step](#)

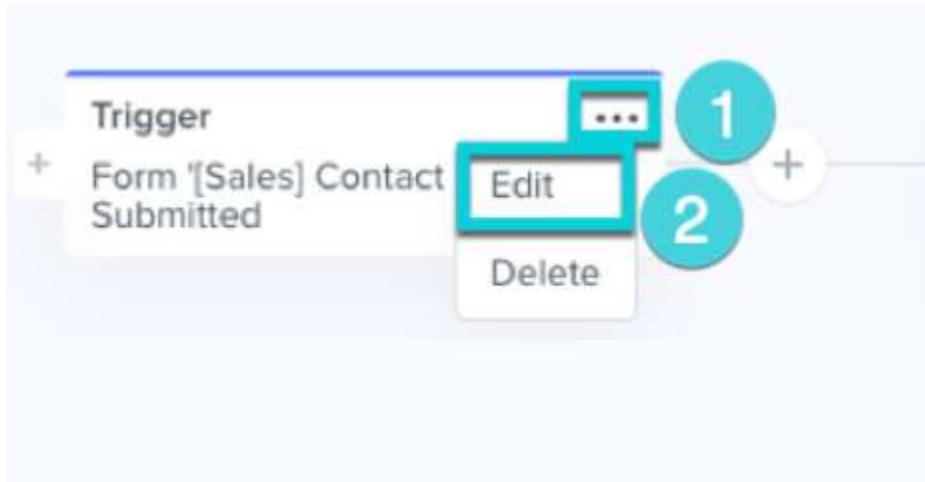
5. Click Save, once the changes are complete

Hint: Adding a step to an Automation only applies to future contacts on that Automation, except in these scenarios:

- Contacts currently on a [delay](#) step will start the new steps if the new step is placed after the delay
- Contacts currently waiting on a [goal](#) step will start new steps if the new step is placed after the goal

Edit an Existing Automation Step

1. Click the "..." icon next to the step you would like to change
2. Click Edit

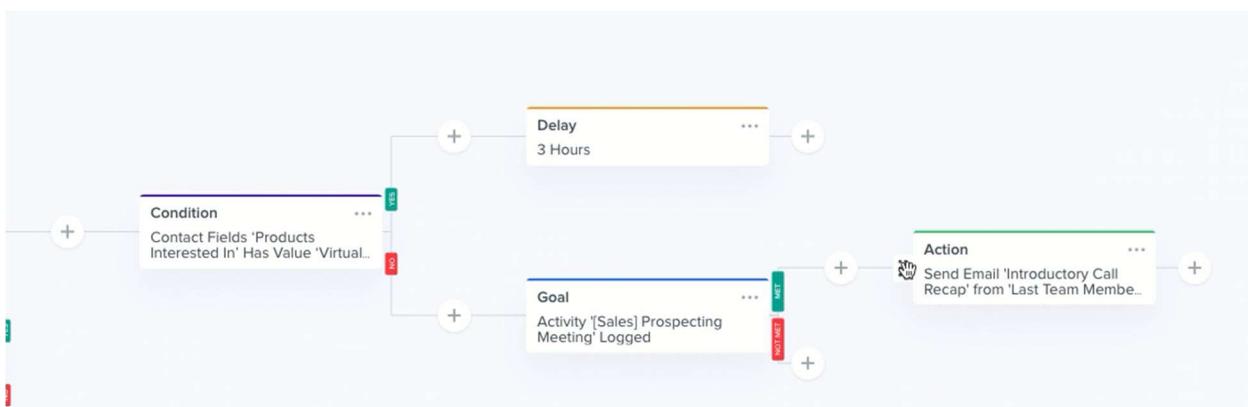


3. Make the necessary changes

4. Click Save

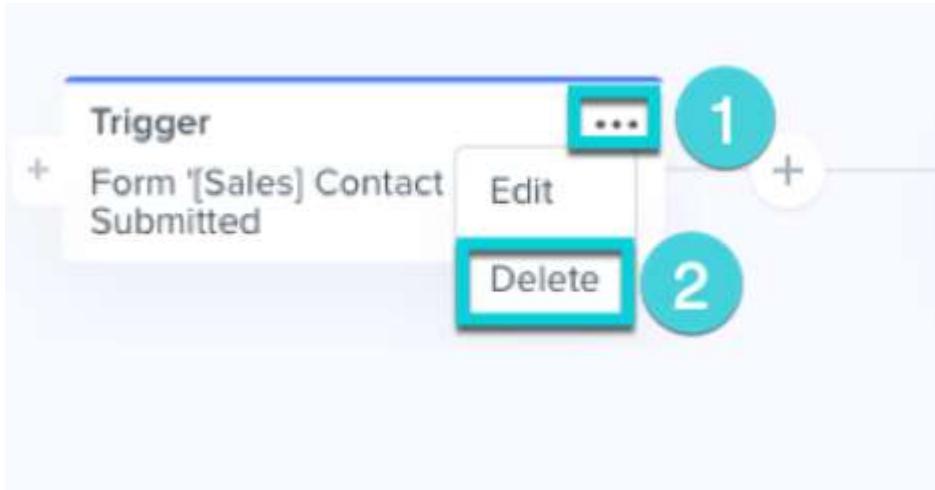
Reorder Existing Automation Steps

1. Hover over the left-hand side on the step you would like to move
2. Select the reorder icon
3. Drag and drop the step to the new location in the automation



Delete an Existing Automation Step

1. Click the "..." icon next to the step you would like to edit
2. Click Delete



Add an Automation Step to an Existing Automation

Add an automation step by clicking the + icon or by drag & dropping [Actions](#), [Conditions](#), [Delays](#), and/or [Goals](#)

