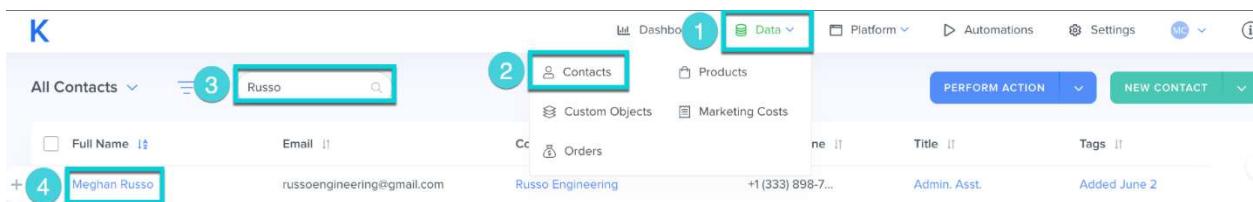


Pause Automations

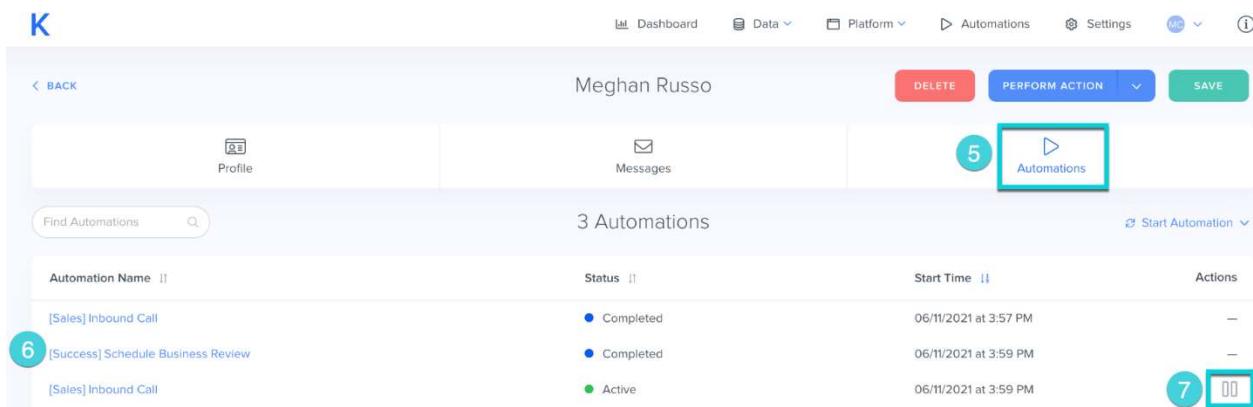
Here are the simple steps to pause an automation:

1. Navigate to Data tab from the top menu
2. Select Contacts
3. Search for the contact you would like to pause the automation for
4. Click on the contact's name



A screenshot of the Data tab in a CRM system. The top navigation bar shows 'Dashboard', 'Data' (highlighted with a teal box), 'Platform', 'Automations', 'Settings', and other options. Below the navigation is a search bar with 'Russo' typed in. A teal box highlights the 'Data' tab. A teal box highlights the 'Contacts' button. A teal box highlights the search bar with 'Russo'. A teal box highlights the contact 'Meghan Russo' in the list.

5. Locate the Automations tab and click on it
6. Find the automation you would like to pause
7. Click Pause in the action column



A screenshot of the Contact details page for 'Meghan Russo'. The top navigation bar shows 'Dashboard', 'Data', 'Platform', 'Automations' (highlighted with a teal box), 'Settings', and other options. Below the navigation is a contact card with 'Meghan Russo' and a teal box highlighting the 'Automations' tab. A teal box highlights the 'Automations' tab. A teal box highlights the automation list with '3 Automations'. A teal box highlights the pause icon in the action column of the automation table.

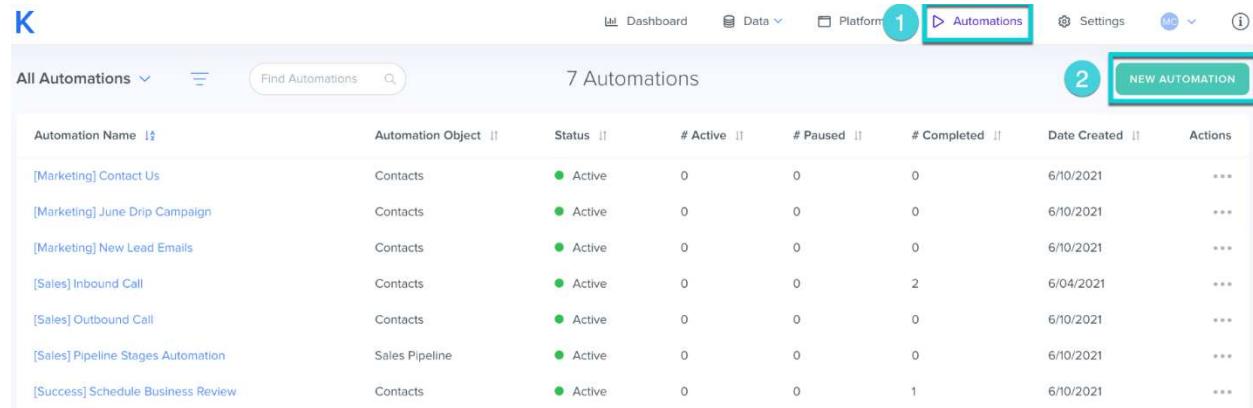
Hint: If you would like to cancel the automation, the contact will restart the automation from the beginning

Cancel Automations

To cancel an automation for a group of contacts, follow the steps below:

1. Navigate to Automations tab from the top menu bar

2. Select New Automation

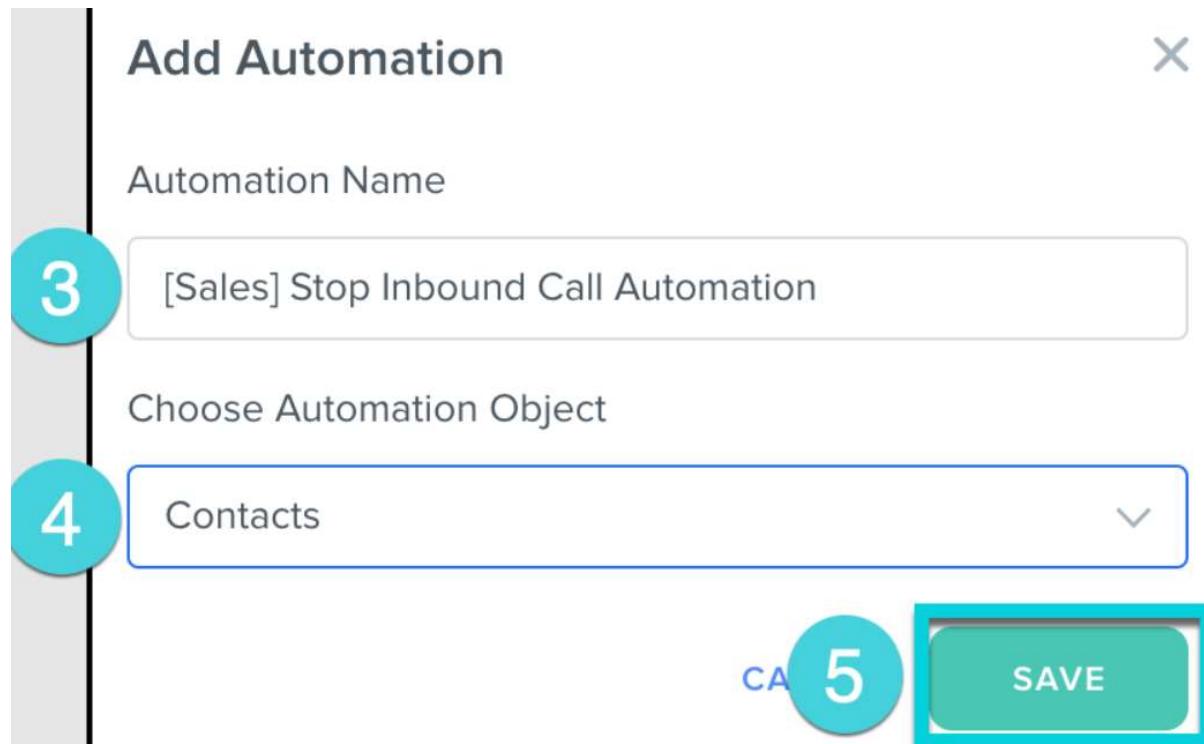


All Automations	Find Automations	7 Automations						Actions
Automation Name	Automation Object	Status	# Active	# Paused	# Completed	Date Created		
[Marketing] Contact Us	Contacts	● Active	0	0	0	6/10/2021	***	
[Marketing] June Drip Campaign	Contacts	● Active	0	0	0	6/10/2021	***	
[Marketing] New Lead Emails	Contacts	● Active	0	0	0	6/10/2021	***	
[Sales] Inbound Call	Contacts	● Active	0	0	2	6/04/2021	***	
[Sales] Outbound Call	Contacts	● Active	0	0	0	6/10/2021	***	
[Sales] Pipeline Stages Automation	Sales Pipeline	● Active	0	0	0	6/10/2021	***	
[Success] Schedule Business Review	Contacts	● Active	0	0	1	6/10/2021	***	

3. Name your Automation

4. Choose Automation Object

5. Click Save



Add Automation

Automation Name

3 [Sales] Stop Inbound Call Automation

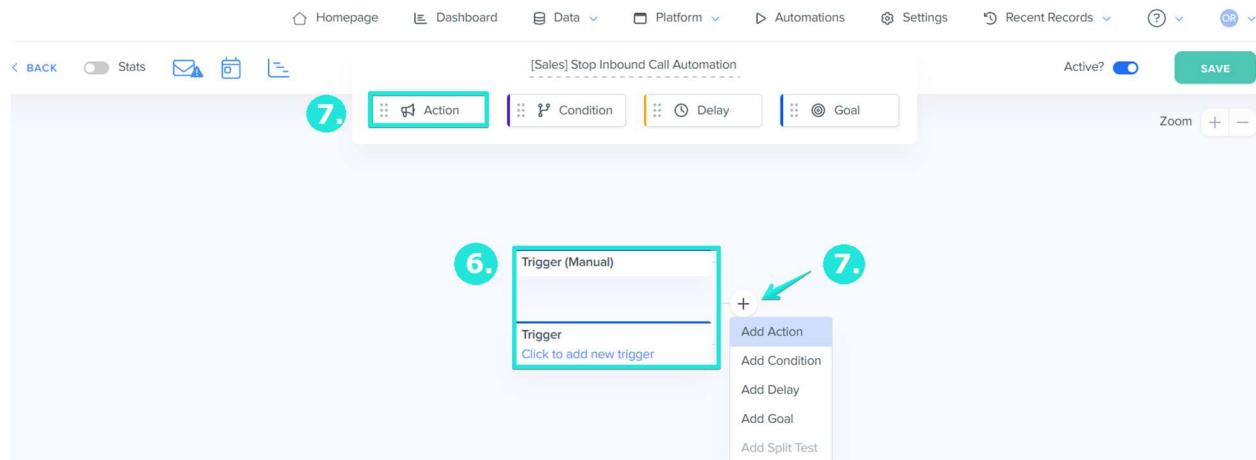
Choose Automation Object

4 Contacts

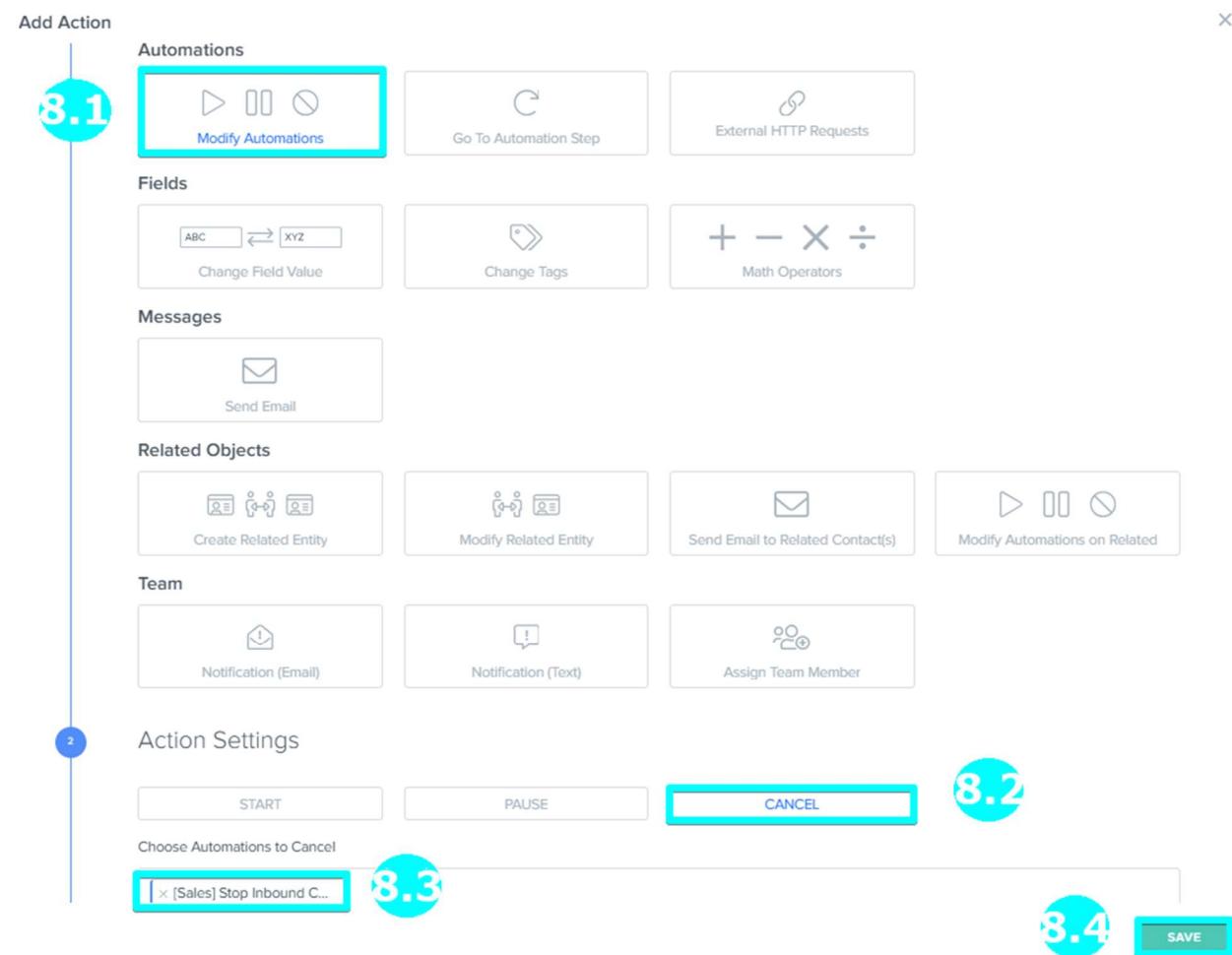
5 SAVE

6. Keep step 1 as Trigger (Manual)

7. Add an Action by drag & dropping the step, or by clicking the + button near the trigger

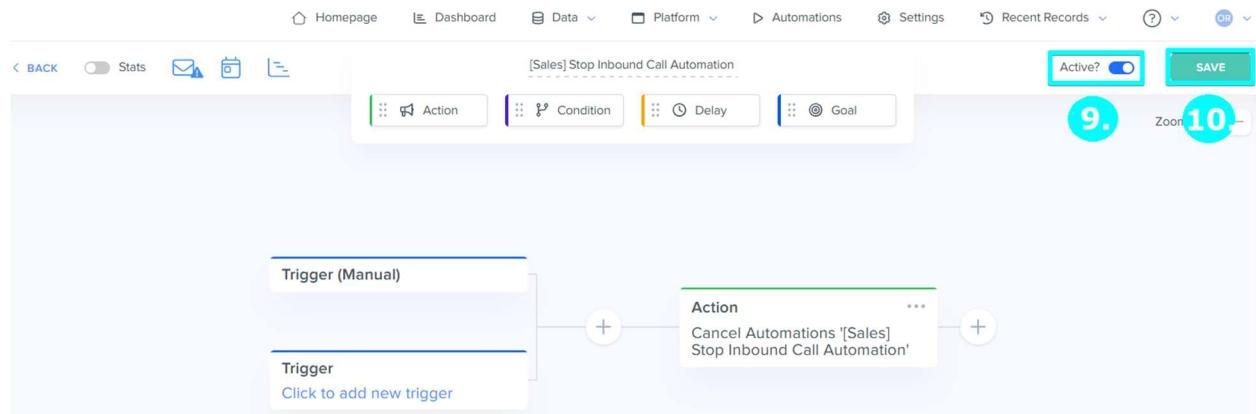


8. Make your action Cancel Automation



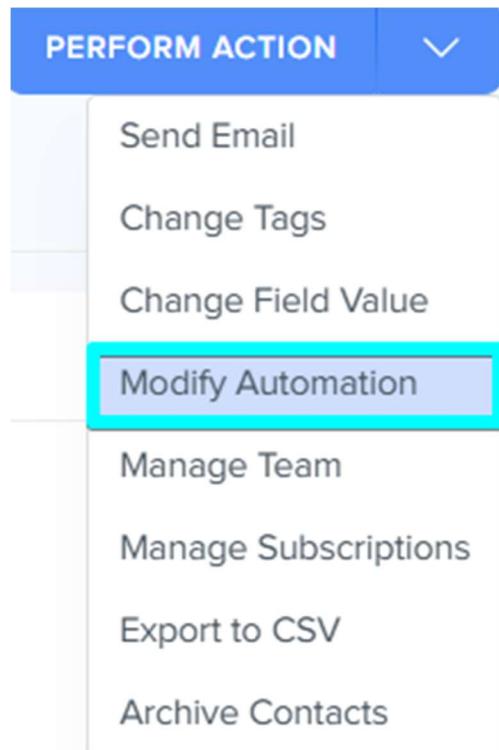
9. Activate the automation by moving the "Active" toggle on

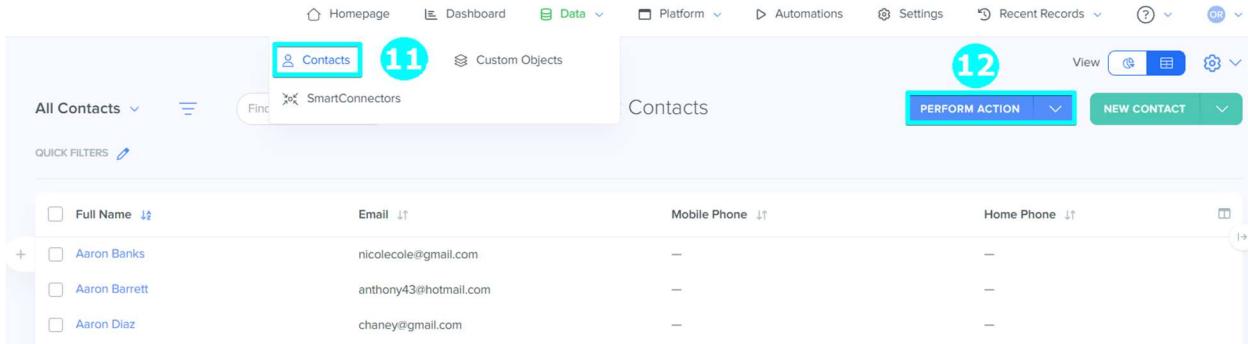
10. Save your automation



11. Go into your Contacts section of your account

12. Click Perform Action button & select Modify Automation option from the menu





Homepage Dashboard Data Platform Automations Settings Recent Records ? ON

Contacts 11 Custom Objects

All Contacts 11 SmartConnectors

Contacts

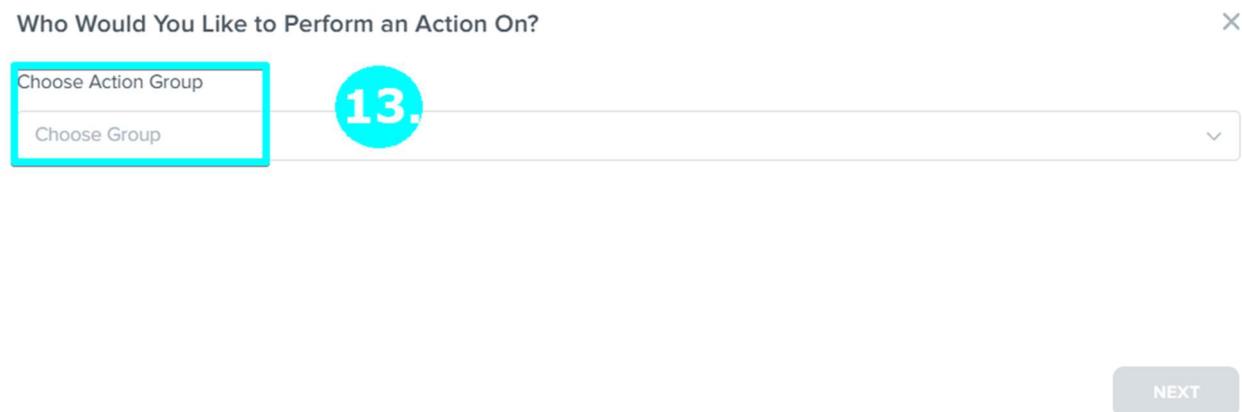
View grid list grid list

PERFORM ACTION NEW CONTACT

QUICK FILTERS

Full Name	Email	Mobile Phone	Home Phone
Aaron Banks	nicolecole@gmail.com	—	—
Aaron Barrett	anthony43@hotmail.com	—	—
Aaron Diaz	chaney@gmail.com	—	—

13. Select the group of contacts you'd like to cancel the automation for



Who Would You Like to Perform an Action On? X

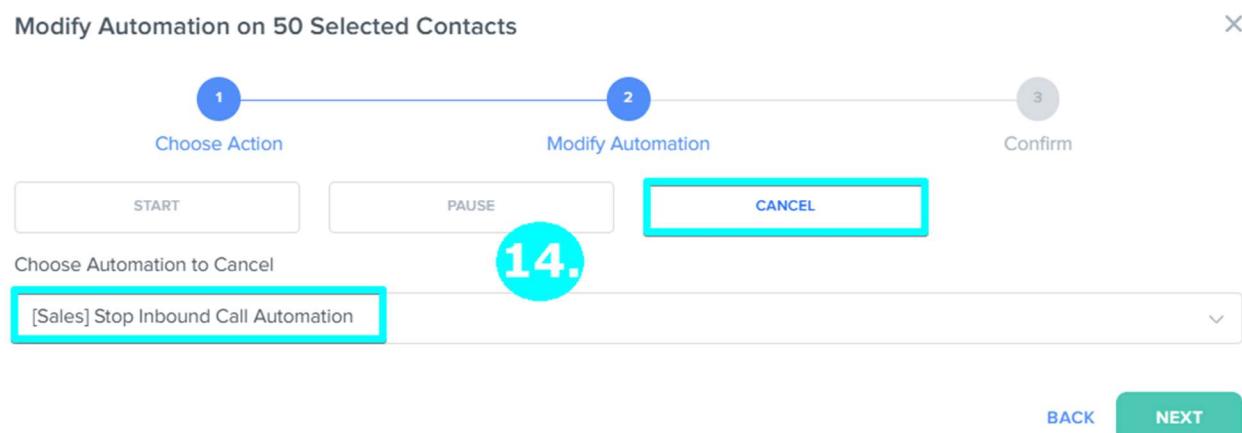
Choose Action Group

Choose Group

13.

NEXT

14. Finally, choose the automation you just created



Modify Automation on 50 Selected Contacts X

1 Choose Action 2 Modify Automation 3 Confirm

START PAUSE CANCEL

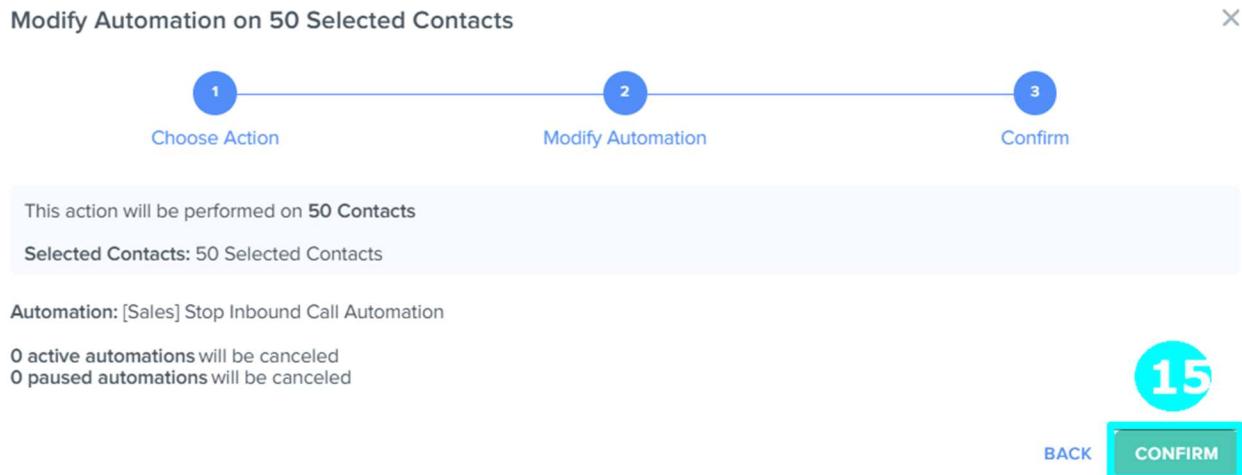
Choose Automation to Cancel

[Sales] Stop Inbound Call Automation

14.

BACK NEXT

15. Complete the process. Now all of those contacts will have the automation defined in the newly created automation cancelled



Hint:

Once it has been cancelled, it must be restarted from the beginning.