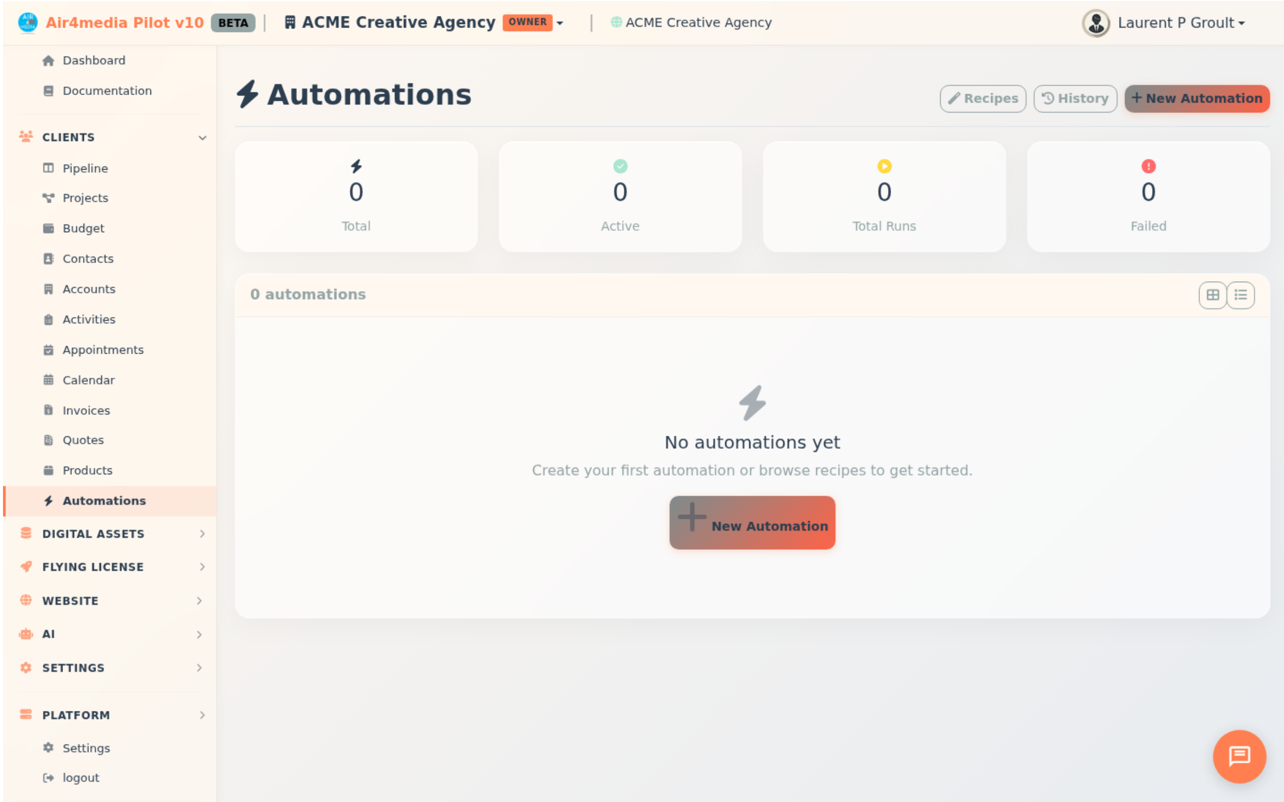

Automations

Set up rules that run automatically when something happens in your account — no technical knowledge required. Automations save time by handling repetitive tasks like sending follow-up emails, creating tasks, or tagging contacts the moment a trigger fires.

Key Features

- **Visual Step Builder**: Add actions one by one to build exactly what happens when an automation runs
- **Wide Range of Triggers**: Start automations from events across Contacts, Invoices, Quotes, Contracts, Projects, Bookings, Forms, and more — or trigger one manually
- **Powerful Actions**: Send emails or SMS, create tasks, add/remove tags, change statuses, log activities, call external webhooks, or pause with a timed delay
- **Dashboard Stats**: See at a glance how many automations are active, how many total runs have occurred, and how many failed — click any stat card to filter the list instantly
- **Pre-Built Recipes**: Activate ready-made automations for common workflows in one click
- **Run History**: Review every execution with step-by-step logs showing what succeeded or failed
- **Toggle On/Off**: Pause any automation without deleting it

How to Use

Create an Automation

1. Click **New Automation**
2. Enter a name and optional description (e.g., "Invoice Paid — Thank You Email")
3. Select a **Trigger** — the event that starts the automation (e.g., "Invoice Paid", "Contact Status Changed")
4. Fill in any trigger conditions that appear (e.g., a specific status value or tag name)
5. In the right panel, click **Add Step** and choose an action type
6. Configure each step — pick an email template, enter a task title, set a delay duration, etc.
7. Use **Available Variables** (shown as clickable chips) to personalize content — for example, insert `{{contact_name}}` or `{{invoice_number}}` into email subjects
8. Check **Active** to enable the automation, then click **Save**

Use a Recipe

1. Click **Browse Recipes**
2. Preview available templates — for example, "New Lead Nurture", "Invoice Reminder", or "Booking Confirmation"
3. Click **Use Recipe** to load it into the editor
4. Adjust any steps to fit your workflow and save

Monitor Runs

1. Click **View History** on any automation to see its past executions
2. Each row shows the status (Completed, Partial, or Failed), the date, and how many steps ran
3. Expand any row to see exactly which steps succeeded or failed and why

Enable or Disable

- Click the toggle on any automation card or list row to turn it on or off instantly
- A green badge means active; grey means paused

Tips

- Test a new automation before it runs live by clicking **Run Now** on its card
- Use the **Wait / Delay** step to space out follow-up emails or tasks over days
- The **Failed** stat card is a quick way to spot broken automations — click it to filter to only

those with errors

- Switch between **Card** and **List** view using the toolbar icons — your preference is saved automatically
- Recipes are a fast way to get started — edit them freely after loading