

Add a contact to an automation from the contact record @

This article applies to:

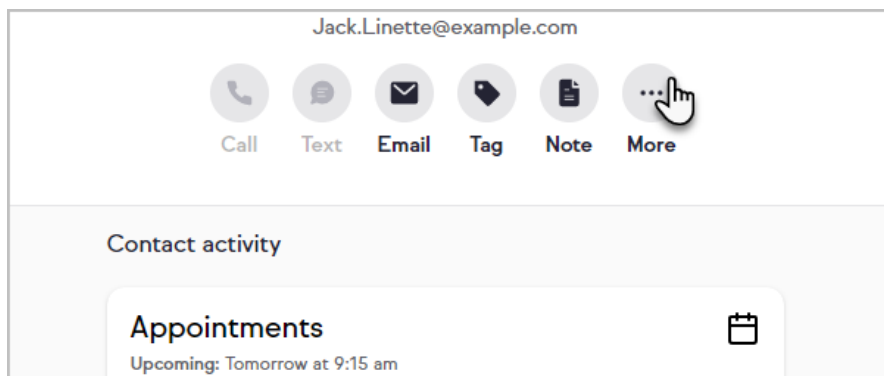
[Pro](#)

[Max](#)

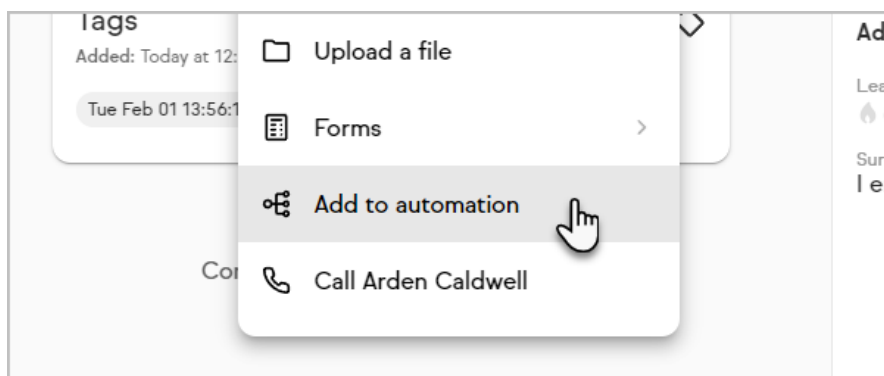
1. [Add a contact to an advanced automation](#)
2. [Add multiple contacts to an advanced automation](#)
3. [View advanced automation in the contact history](#)

Add a contact to an advanced automation

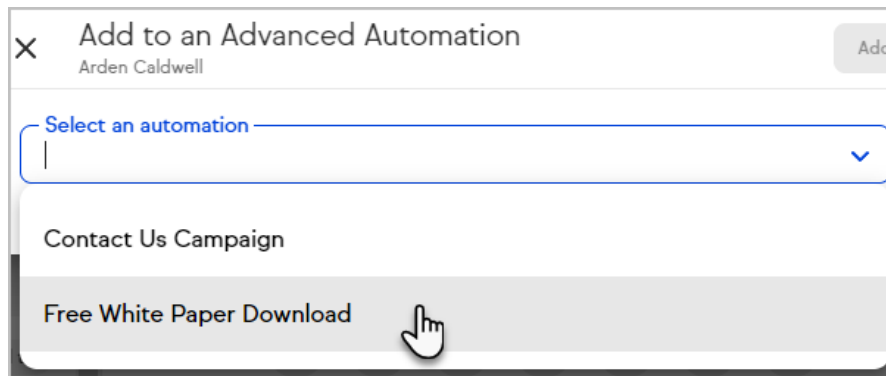
1. Navigate to a contact record and click **More**



2. Click **Add to automation**



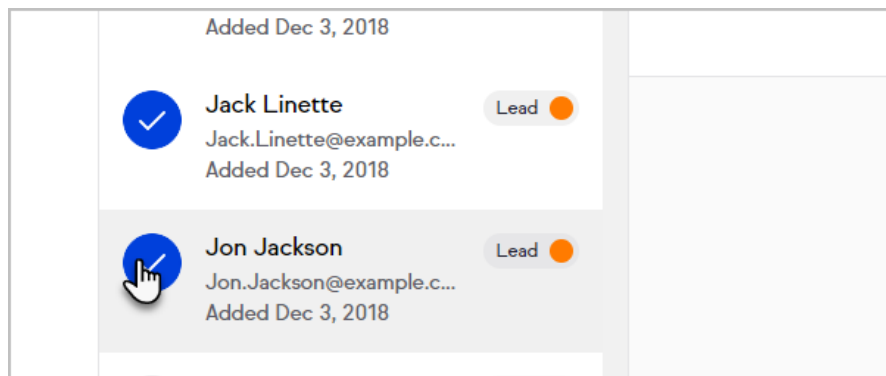
3. Select an automation



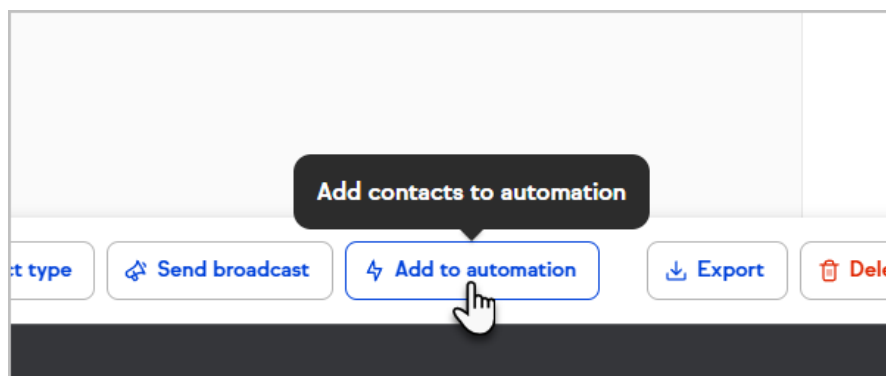
4. Click **Add**

Add multiple contacts to an advanced automation

1. Navigate to a contact list
2. Select multiple contacts from your list



3. Click **Add to automation**



4. Select an automation
5. Click **Add**

View advanced automation in the contact history

You can [view and manage](#) individual actions that are part of an advanced automation on the contact record.

Lead Client Other

Aspen Torff
Investigator
Amazing Auto
(608) 555-5555
aspen.torff@amazing.auto

Text Email Tag Note Task More

Contact Activity

Tasks
Due: Today, 5:00 pm
Call Aspen with a list of items we tagged at the scene of the burglary
+1 more task

Automations
Last added: Aug 23, 2:32 pm

Easy
New lead follow up Appointment reminder

Advanced
Lost customer re-engagement

Automations
Aspen Torff

Easy automations

Next step **Active**
Create a task
Follow up with [Contact first name]
[Contact last name]
New lead follow up

Next step **Active**
Send an email
Hey, [Contact first name] I missed you at the meeting.
Appointment reminder

Advanced automations

Sequence **Active**
Title of sequence
Added: Oct 25 2022, 8:00 am
Lost customer re-engagement

Action Completed
Untitled email
Oct 17 2022, 12:00 pm
Lost customer re-engagement

Action **Upcoming**
Subject line goes here...
Sending: Oct 17 2022, 12:00 pm
Lost customer re-engagement