Pipeline automation »

This article applies to:

Pro Max

Pipeline automation provides the ability to automate key steps in your pipeline process. You can keep your leads moving through your sales process by configuring automation that triggers when a new lead enters or exits a stage.

Pro-Tip! Automations created with a **Deal enters stage** trigger, will not only trigger when moving a deal manually from one stage to another, but also whenever a deal is created it's considered to be 'Entering' the selected starting stage, and therefore the automation will trigger.

- 1. Add automation to a stage
- 2. Delete automation from a stage

Add automation to a stage

The automation for your Pipeline is powered by Keap's Easy Automations. For more information on how to create powerful automations with just a view clicks, refer to our Easy Automations help article.

- 1. From the left navigation menu, click Pipeline
- 2. Click Automate stage in the relevant stage

\$60	Eric Thompson \$850	
	Potential deal with Eric	+ Add a deal
utomate stage	Sarah Richardson \$1,125 Smith Richardson - speaking e	
	+ Add a deal 4 Automate stage	

3. Build your automation in the side panel or, to build your automation in a larger view, click **Go to automations**



 Choose a "When" event to start your automation You can choose from "Deal enters stage", "Deal exists stage" or "Deal is closed"

			Pipeline	
s	• Ū	In review	Deal enters stage	Deal exits stage
]		Deal is closed	
4 Autor	mate stage	+ Add a deal 4 Auto		

5. Configure the trigger and click **Next**

X Choose a stage	⊘ Saved Next
When a deal enters: Choose stage* Qualifying	~

6. Review your automation trigger and click **Next** to choose what to automate

\leftarrow Build automation	Next
When \rightarrow Then	⊘ Saved
A deal enters (Qualifying)	^
Qualifying Pipeline: Default	r i

7. Select what should be automated



8. Continue configuring your automation and click **Preview**



9. Review your automation and click **Publish**



10. A pipeline stage with automation configured has a lightning bolt icon

2 団	Qualifying Total: \$3,975	3 存団	Demo Total: \$6,000
\$2,200	Jon's project	\$2,000	Tessa Randall Very lucrative o
\$60	Eric Thompson Potential deal with Eric	\$850	+ Add a deal

Delete automation from a stage

1. Click Edit automation



2. Open the menu for the automation you want to delete

× My automations	च ⊕
Filters Stage: Qualifying	
Active Pipeline: Default - Qualifying	€

3. Click Delete

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4. Confirm by clicking **Delete automation**

