Pipeline automation

This article applies to:

Pro
Max

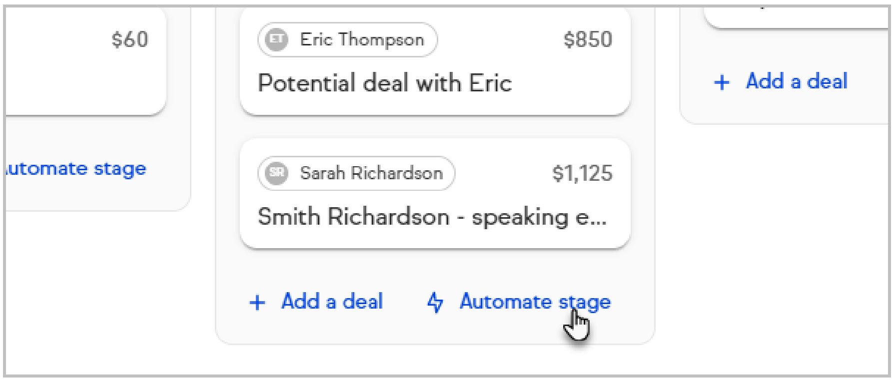
Pipeline automation provides the ability to automate key steps in your pipeline process. You can keep your leads moving through your sales process by configuring automation that triggers when a new lead enters or exits a stage.

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.

Add automation to a stage

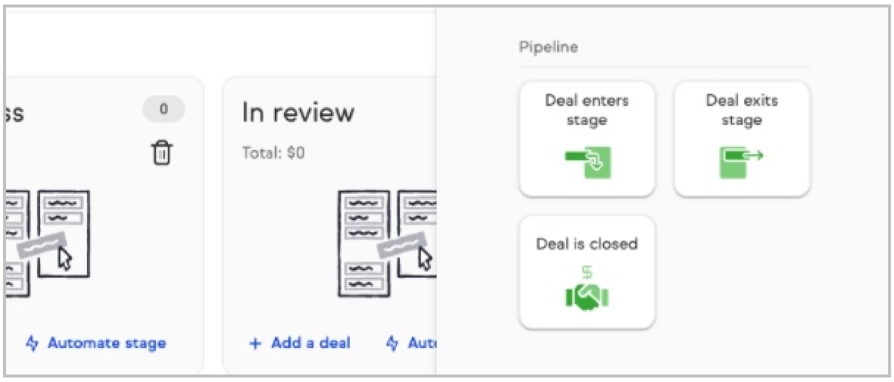
The automation for your Pipeline is powered by Keap's Easy Automations. For more information on how to create powerful automations with just a view clicks, refer to our Easy Automations help article.

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

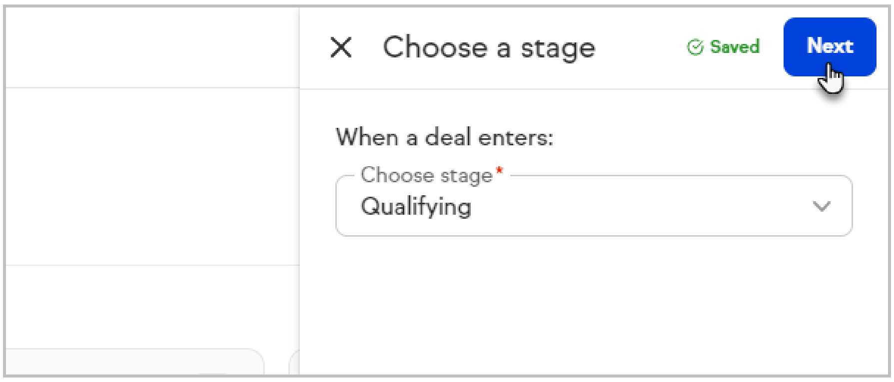


3. Build your automation in the side panel or, to build your automation in a larger view, click **Go to automations**

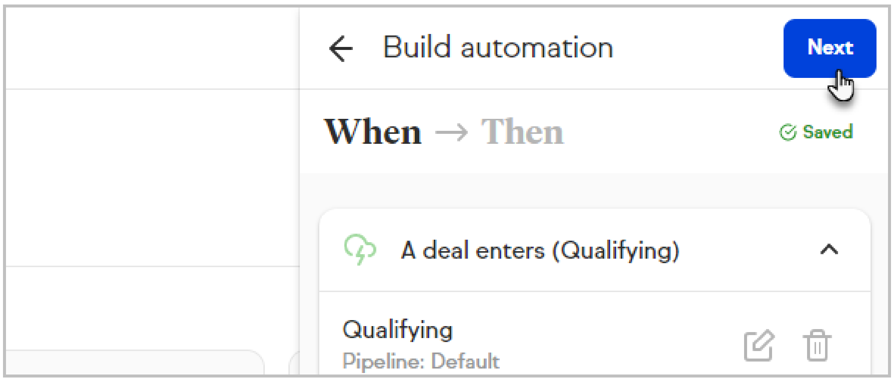
4. Choose a "When" event to start your automation
   You can choose from "Deal enters stage", "Deal exists stage" or "Deal is closed"



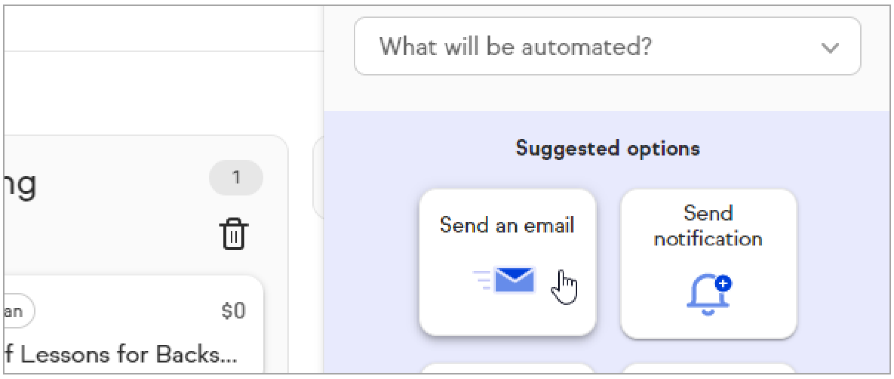
5. Configure the trigger and click **Next**



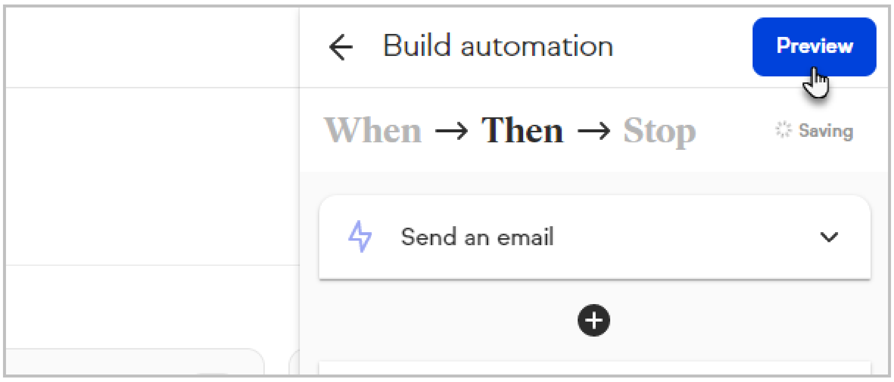
6. Review your automation trigger and click **Next** to choose what to automate



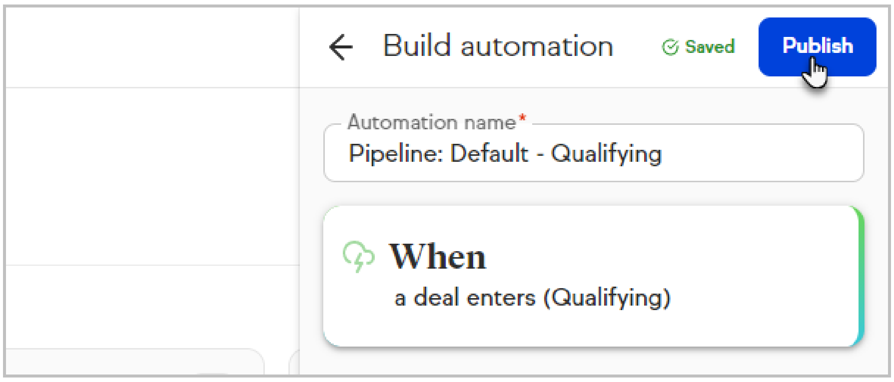
7. Select what should be automated



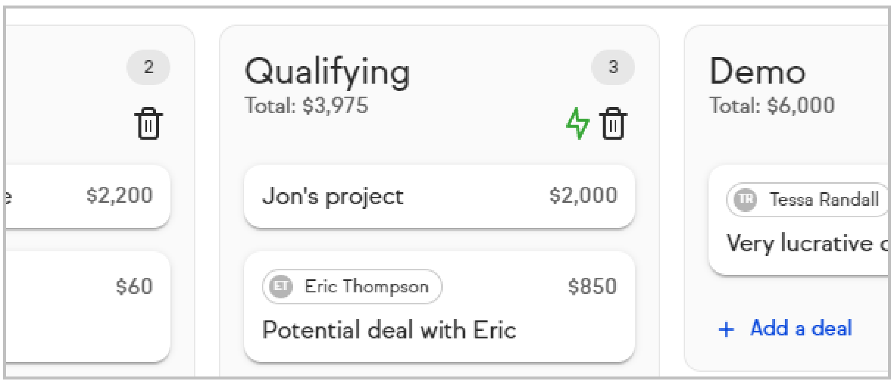
8. Continue configuring your automation and click **Preview**



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

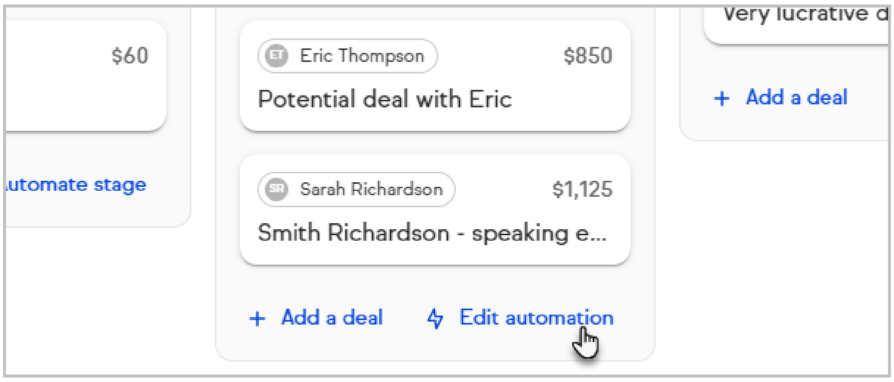


10. A pipeline stage with automation configured has a lightning bolt icon

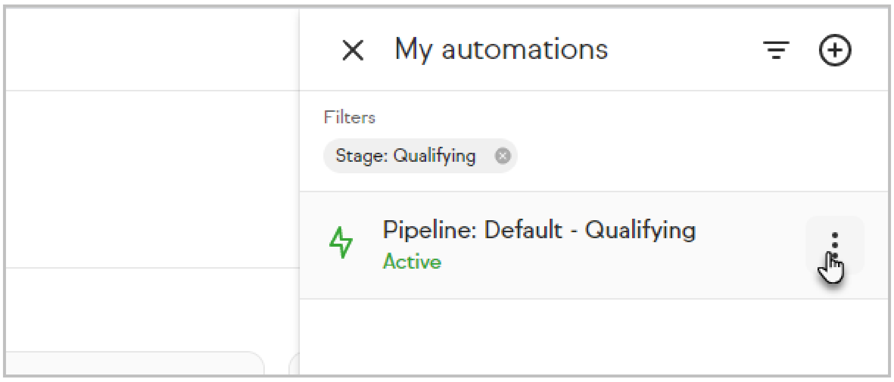


Delete automation from a stage

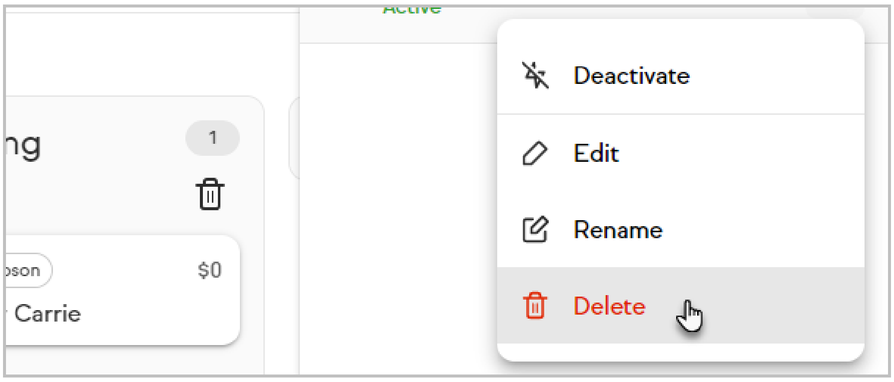
1. Click **Edit automation**



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



3. Click **Delete**



4. Confirm by clicking **Delete automation**