Easy Automations

This article applies to:

Automating your repetitive tasks just got as simple as “when” and “then”. For example, when someone fills out your public form, then Keap can send them a welcome email. Or assign you a task. Or both. Or... Well, let's just say there's a lot more.

Access Easy Automations by clicking the Automations item in the menu

Automation when and stop conditions

Easy Automations are started by “when” conditions being fulfilled. Contacts can be removed from an Easy Automation when they meet a stop condition. You can choose one of the following to trigger or stop your automation:

- A public form or internal form receives a submission
- A new appointment is scheduled
- An appointment is cancelled
- A tag is added to a contact
- A product is purchased (either a specific product or any product)

Automation then conditions

Once your automation is started, you can configure one or multiple events to happen. You can choose any of the following events:

- Send an email to the contact who triggered the automation
- Send a notification (desktop, mobile*, and/or email) to all your users, the contact's owner, or a specific user
- Add a tag to the contact who triggered the automation
- Remove a tag from the contact who triggered the automation
- Create a task for the contact who triggered the automation that can be assigned to the contact owner or a specific user
- Create a Pipeline deal (Pro only)

*Mobile notifications require the Keap user to have installed the Keap Mobile app.
Use a template to create an automation

Quickly implement automation into your business with our templates. Each template includes a pre-written email that can be edited.

1. Click the + plus button on the desired template

   ![Automation Templates]

2. Edit the automation as desired (refer to the other sections of this article for assistance)

3. Click Preview when you're done configuring your automation

   ![Preview]

4. Click Publish to finalize and launch your automation

   ![Publish]

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Create an automation

Build the automation your business needs without any confusion.

1. Click the + plus button
2. Click **When** to configure what will start the automation

3. Search for an option or select one from the list

4. Depending on the "when" you chose, you may need to select which tag, appointment, or product will trigger your automation

5. Click the "when" item to see configuration options
6. Each "when" will include an **edit button** to reconfigure it, a **trash bin button** to delete it, an option to go to the chosen page or settings (in this example, **Go to booking link**), and a **Done button** to collapse the card.

7. Click **Next** once your "when" is configured

8. Select what should happen first when your automation is run

9. Configure the "then"
10. Click **Next**

11. Choose to have the "then" happen immediately or to delay it
   
   **Note:** To trigger an event at a specific time, select **Delayed** and check the **At a specific time** box

12. Click **Done**

13. Click the "then" card to edit it or click the **plus button** to add additional "then" events (return to step 8 if adding additional events)

14. Click **Preview** once you have finished creating your automation
15. Review your automation

16. Click Publish

17. Click *Rename automation* to give your automation a memorable name
18. Enter a name and click Update

19. Your automation will be listed under My automations

Stop automation when an action is completed

Your Easy Automations have an option to stop running for individual contacts when a specific action is completed either by the contact or by a Keap user. In order to set your stop condition, your Easy Automation must contain at least one delayed "then" automation.

1. Set a "then" condition to be delayed
2. Click the **Stop** card in your Easy Automation preview

3. Select what should stop your automation

4. Configure the stop condition as needed

5. Click **Preview**

6. Review and publish your automation

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**View and remove contacts in an automation**

1. Select a published automation

2. Click **View** next to the number of active contacts in your automation
3. Select any or all contacts to remove from the automation
4. Click Remove from automation
5. Click Yes, remove to confirm

Edit an automation

Make changes to your automations as your business evolves.

**Note:** Editing whether a "then" occurs immediately or after a delay requires an automation to be deactivated which will remove all contacts from the automation.

1. Select your automation

2. Click the When or Then card

3. Click the item to expand it
4. Each item will include an edit button to reconfigure it, a trash bin button to delete it, an option to go to the chosen page or settings (in this example, Manage tags), and a Done button to collapse the card. “Then” items will include options to have the event occur immediately or to delay them.

5. Click Preview once you’ve made all the desired edits

6. Click Publish edits

7. Click Rename automation to update the name of your automation
Rename an automation

1. Click the menu button next to your automation

2. Click Rename

3. Update the automation's name and click Update
Deactivate an automation

Deactivating an automation will stop it from adding new contacts to the automation and will stop events from being triggered for any contacts who previously satisfied your "when" condition. All contacts will be removed from the automation when it is deactivated. You can reactivate an automation by editing and publishing it.

1. Select your automation

2. Open the menu

3. Click Deactivate

4. Click Yes, deactivate
Delete an automation

Deleting an automation will remove it from your app and stop events from being triggered for any contacts who previously satisfied your "when" condition. All contacts will be removed from the automation when it is deleted.

1. Click the menu button next to your automation

2. Click **Delete**

3. Click **Yes, delete**
FAQs

What is Easy Automation?
An easy-to-use, step by step method into automating workflows end-to-end to help small business owners save time and make more sales, automatically.

Which edition(s) of Keap have to Easy Automation?
All Keap editions (Lite, Pro, Max) have access to Easy Automation.

Can the advanced email builder be used in Easy Automation?
No, Easy Automation exclusively uses Keap's simple email builder.

What happens if a contact takes an action that triggers an automation a second time? For example, filling out a public form twice?
The contact will enter the automation again unless they are currently in the automation and waiting for a timer to trigger additional automation.

What time zones does Easy Automation reference?
Easy Automation is based on the user’s time zone settings for their Keap app.

Does Easy Automation support integrations?
Easy Automation supports tag-based integrations.

What timers are available in Easy Automation?
Easy Automation includes an option to delay "Thens" for a set number of minutes, hours, days, weeks, or months. To trigger a "Then" at a specific time, select the Delayed option, then check the At a specific time box.

Can I see if a contact is in an Easy Automation?
You can see the individual actions triggered by an Easy Automation (e.g. email
sent, tag added) on a contact’s activity feed or by viewing the list of contacts in the automation.

Will an Easy Automation be triggered for existing contacts that already had a tag or other trigger associated with the contact?
No, Easy Automation will only take action on contacts that meet the “When” criteria after the Easy Automation is published.

I encountered an error when attempting to publish my automation. What should I do?
Easy Automations will prevent you from creating a loop of activities that are all set to happen immediately. If you encounter this error, add delays between the events of your automation.