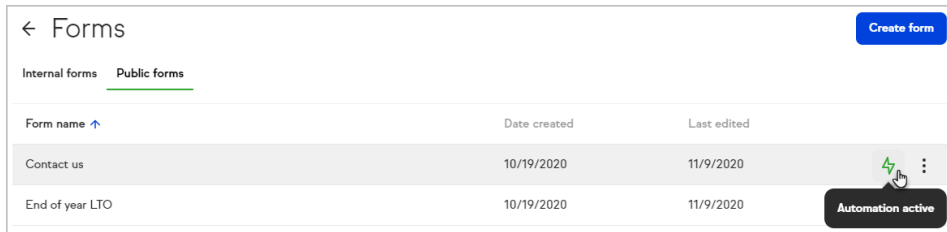


Forms automation


This article applies to:

You can automate your follow up as you create and manage your forms with access to your Easy Automations on the Forms page.

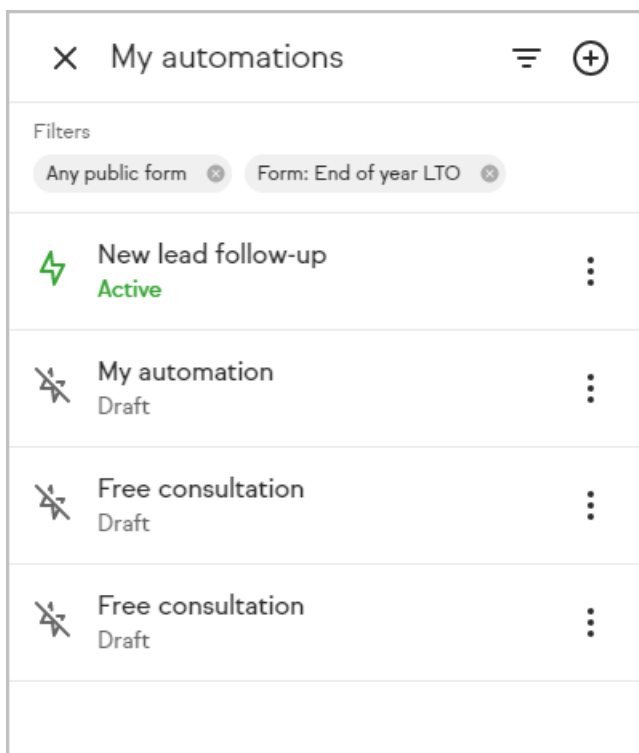
Any internal or public forms that are involved in an Easy Automation will have a lightning bolt icon next to them.



The screenshot shows the 'Forms' page with a 'Create form' button in the top right. Below the header, there are tabs for 'Internal forms' and 'Public forms'. A table lists forms with columns for 'Form name', 'Date created', and 'Last edited'. The 'Contact us' form is highlighted, and a lightning bolt icon is visible next to it. A tooltip 'Automation active' is shown over the lightning bolt icon.

| Form name  | Date created | Last edited |
|---|--------------|-------------|
| Contact us | 10/19/2020 | 11/9/2020 |
| End of year LTO | 10/19/2020 | 11/9/2020 |

Click that icon to see your related Easy Automations. You can create and edit your Easy Automations from this view.



The screenshot shows the 'My automations' page with a search bar and a list of automation rules. The first rule is 'New lead follow-up' which is 'Active' and has a lightning bolt icon. The other three rules are 'My automation', 'Free consultation', and 'Free consultation', all of which are 'Draft' and have a crossed-out lightning bolt icon.

| Automation Name | Status |
|--------------------|--------|
| New lead follow-up | Active |
| My automation | Draft |
| Free consultation | Draft |
| Free consultation | Draft |