



How to build an automation inside
ActiveCampaign

Step: 01

Welcome!

In this Guide, we will learn how to build an automation inside ActiveCampaign

The screenshot displays the ActiveCampaign dashboard interface. On the left is a dark sidebar with navigation options: Getting Started (highlighted), Contacts, Campaigns, Automations, Deals, Conversations, Lists, Forms, Reports, Apps, Settings, and Demo. The main content area has a header with the text "Welcome to ActiveCampaign, Demo. Let's get started" and a "View Our Learn Resources" button. A "Welcome!" modal is open, containing a progress bar for "2/8 completed" and a list of tasks:

- ✓ Create a List: We've added a list to your account to help you get started.
- ✗ Import your contacts: Import
- ✗ Integrate apps: Connect
- ✗ Build an Automation: Build
- ✗ Create a Form: Create
- ✗ Create a Campaign: Create
- ✓ Create a Deal
- ✗ Set up site tracking: Set Up

A "Help" button is located in the bottom right corner of the dashboard.

Step: 02

Click on "Automations"

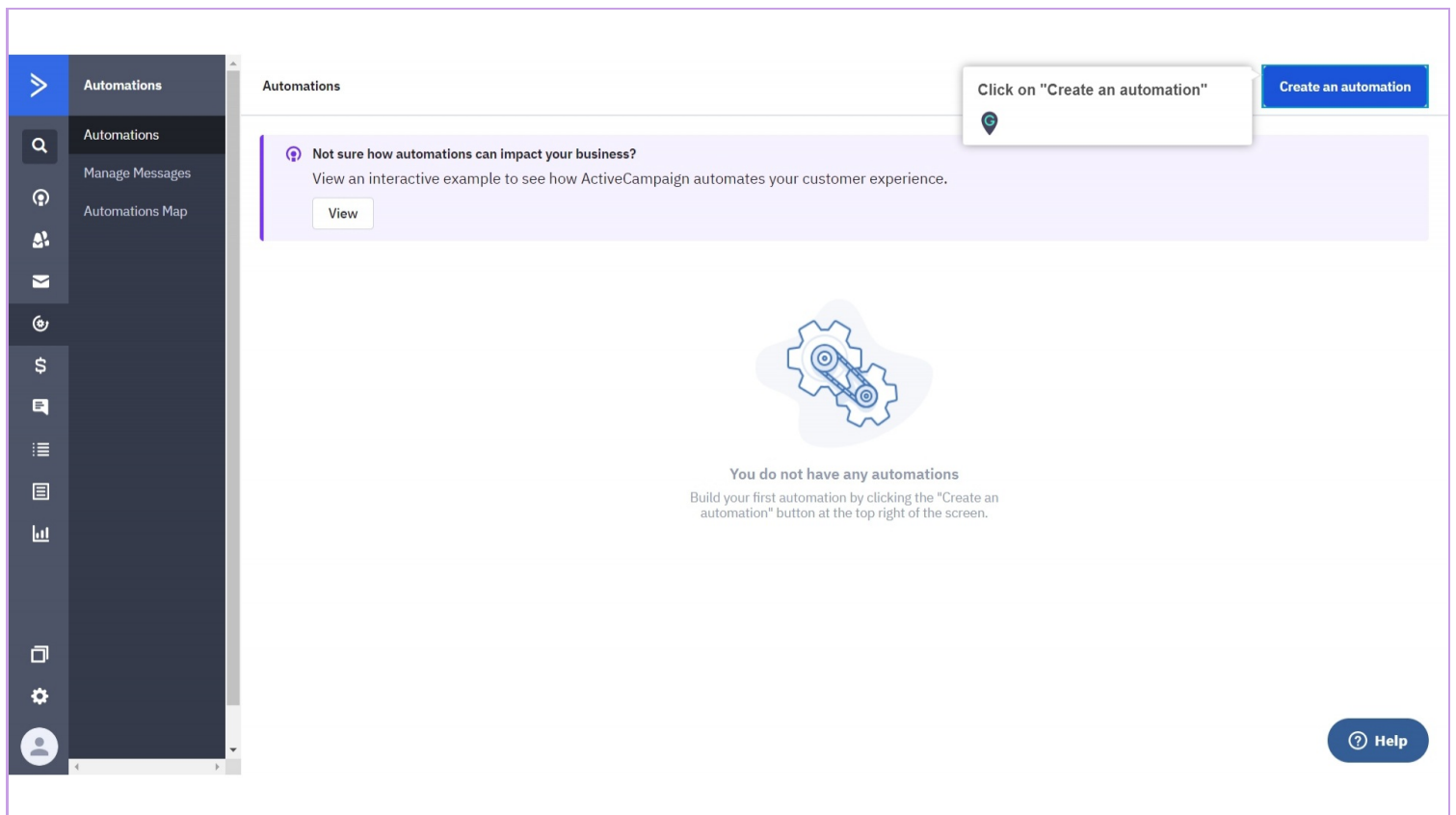
The screenshot displays the ActiveCampaign dashboard interface. On the left, a dark sidebar contains a navigation menu with the following items: Getting Started, Contacts, Campaigns, Automations (highlighted with a blue bar and a right-pointing arrow), Deals, Conversations, Lists, Forms, Reports, Apps, and Settings. A search bar is located at the top of the sidebar. The main content area features a header with the text "Welcome to ActiveCampaign, Demo. Let's get started!" and a "View Our Learn Resources" button. A modal window titled "2/8 complete" is open, listing several onboarding tasks with progress indicators and action buttons:

- ✓ Create a List: We've added a list to your account to help you get started.
- Import your contacts: Import
- Integrate apps: Connect
- Build an Automation: Build
- Create a Form: Create
- Create a Campaign: Create
- ✓ Create a Deal
- Set up site tracking: Set Up

A callout box with a location pin icon and the text "Click on 'Automations'" points to the "Automations" menu item in the sidebar. A "Help" button is visible in the bottom right corner of the dashboard.

Step: 03

Click on "Create an automation"

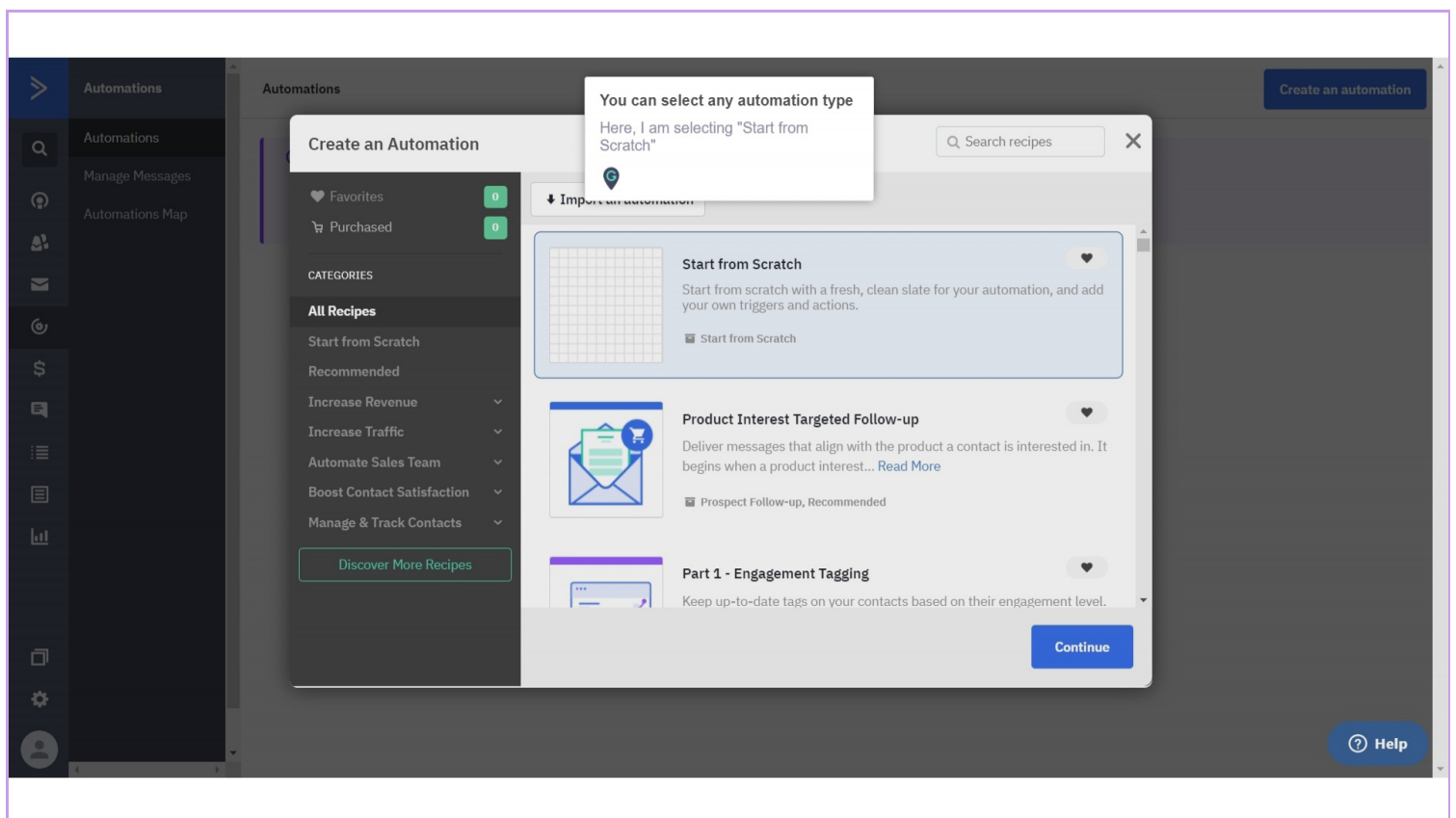


The screenshot shows the ActiveCampaign interface for the 'Automations' section. On the left is a dark sidebar with navigation icons and labels: 'Automations', 'Automations', 'Manage Messages', and 'Automations Map'. The main content area is titled 'Automations' and features a blue 'Create an automation' button in the top right corner. A white callout box with a red location pin icon points to this button, containing the text 'Click on "Create an automation"'. Below the button is a purple banner with a question mark icon and the text: 'Not sure how automations can impact your business? View an interactive example to see how ActiveCampaign automates your customer experience.' with a 'View' button. In the center of the page is a large graphic of interlocking gears. Below the gears, the text reads: 'You do not have any automations' followed by 'Build your first automation by clicking the "Create an automation" button at the top right of the screen.' A 'Help' button is located in the bottom right corner of the interface.

Step: 04

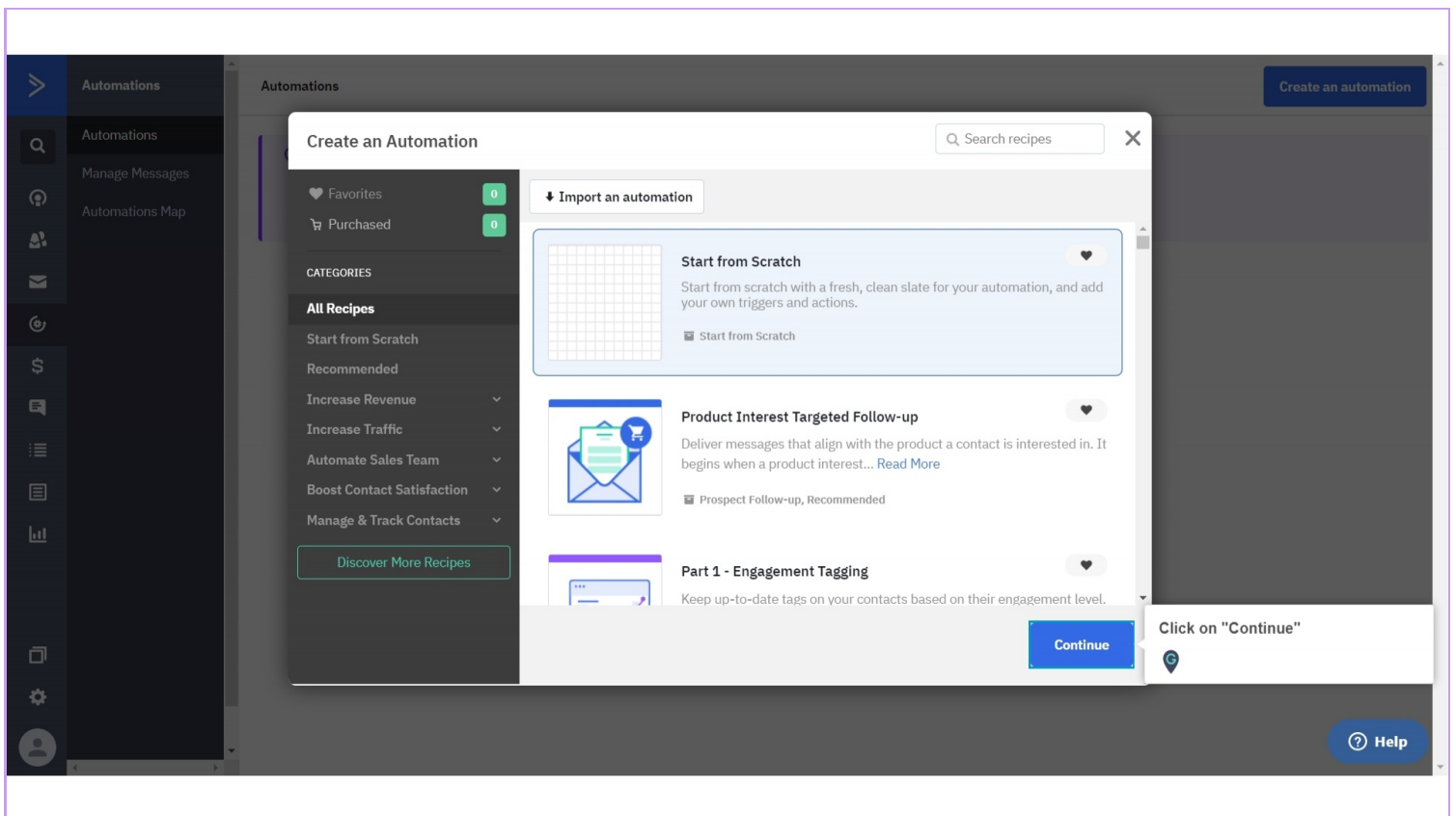
You can select any automation type

Here, I am selecting "Start from Scratch"



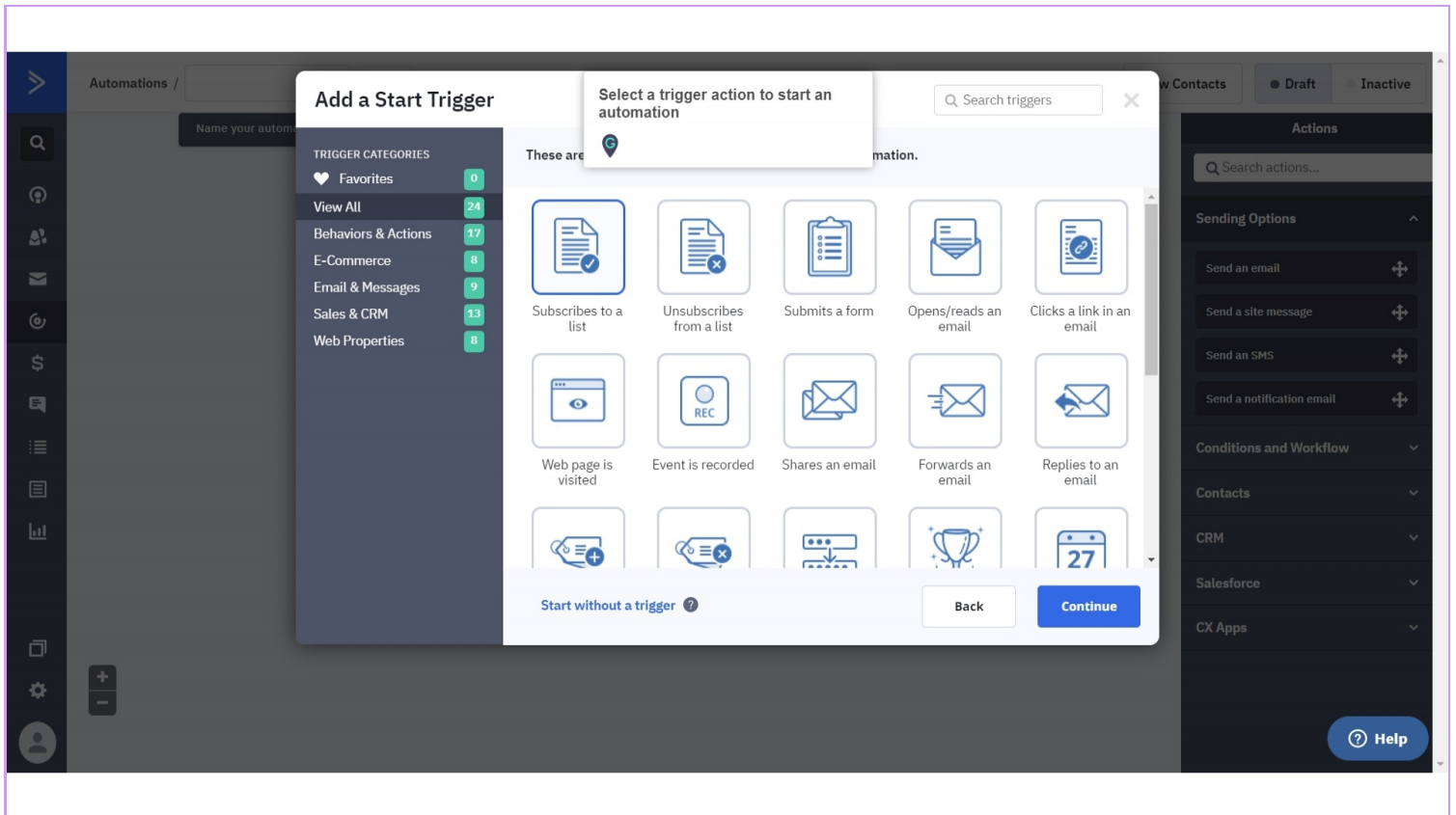
Step: 05

Click on "Continue"



Step: 06

Select a trigger action to start an automation



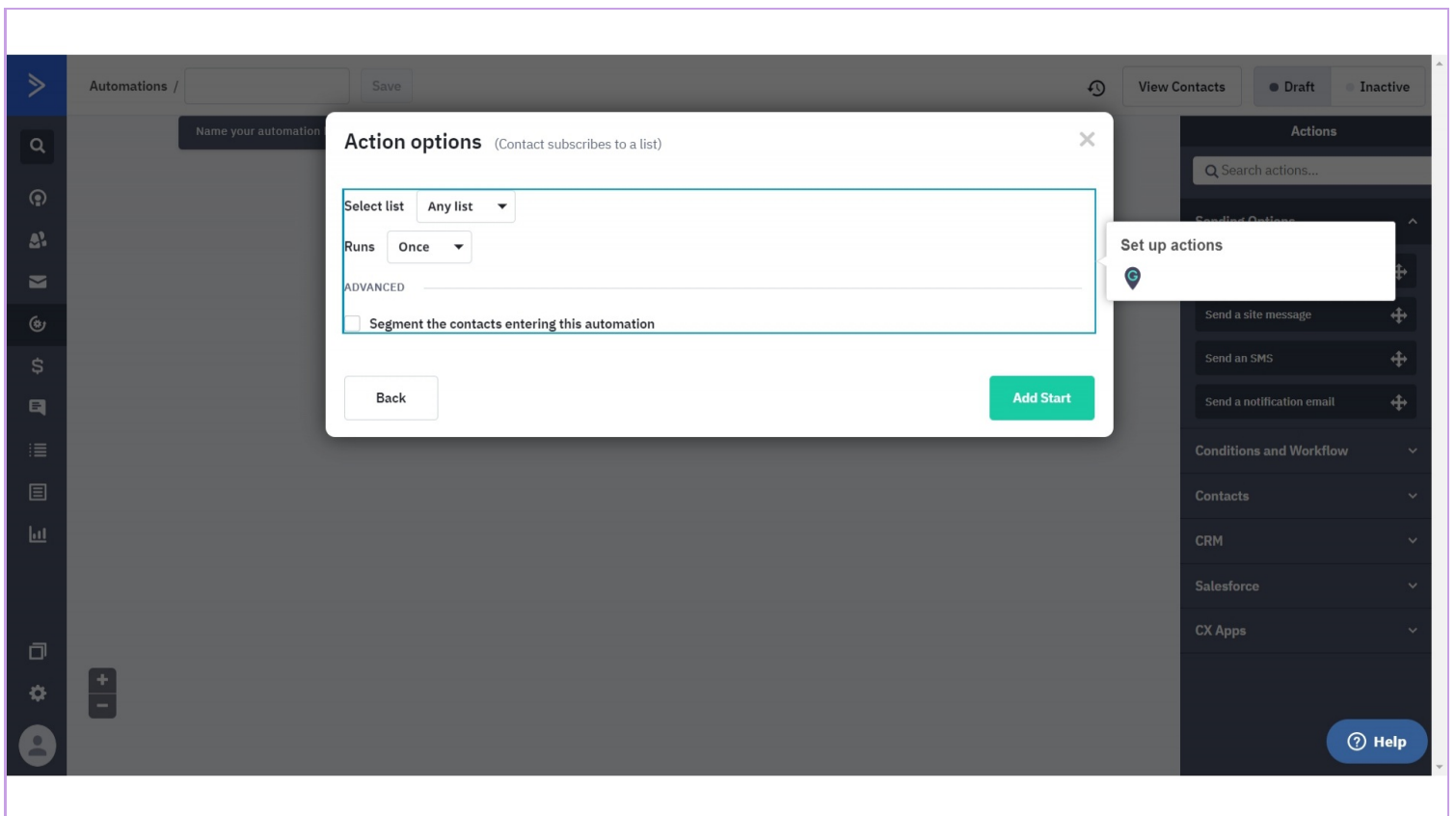
Step: 07

Click on "Continue"

The screenshot displays the 'Add a Start Trigger' dialog in an automation software interface. The dialog is titled 'Add a Start Trigger' and features a search bar at the top right. On the left side, there is a sidebar with 'TRIGGER CATEGORIES' including Favorites (0), View All (24), Behaviors & Actions (17), E-Commerce (8), Email & Messages (9), Sales & CRM (13), and Web Properties (8). The main area of the dialog is titled 'These are all the trigger actions available to start an automation.' and contains a grid of 15 trigger options, each with an icon and a label: 'Subscribes to a list', 'Unsubscribes from a list', 'Submits a form', 'Opens/reads an email', 'Clicks a link in an email', 'Web page is visited', 'Event is recorded', 'Shares an email', 'Forwards an email', 'Replies to an email', 'Starts a video call', 'Event is recorded', 'Shares an email', 'Forwards an email', 'Replies to an email', and 'Event is recorded'. At the bottom of the dialog, there are three buttons: 'Start without a trigger', 'Back', and 'Continue'. A callout box with a red dot points to the 'Continue' button, containing the text 'Click on "Continue"'. The background shows a partial view of the automation workflow editor with a sidebar on the left and an 'Actions' panel on the right.

Step: 08

Set up actions



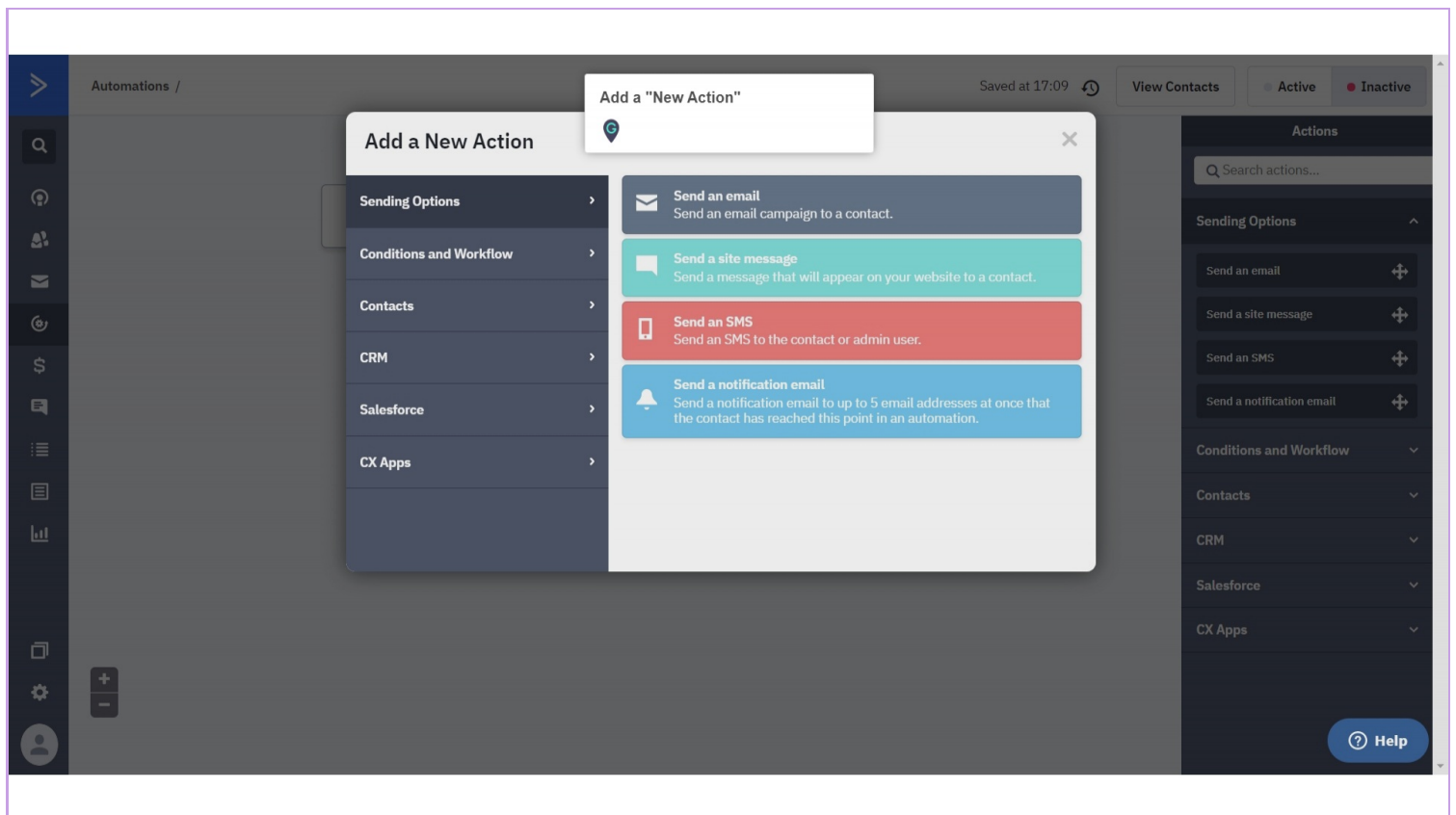
Step: 09

Click on "Add Start"

The screenshot displays the 'Action options' configuration window for an automation. The window is titled 'Action options (Contact subscribes to a list)'. It features a 'Select list' dropdown set to 'Master Contact List' and a 'Runs' dropdown set to 'Multiple Times'. Under the 'ADVANCED' section, the checkbox 'Segment the contacts entering this automation' is checked. A condition is defined as 'Current day of the week (Asia/Calcutta) Is Sunday'. Below this condition is a button labeled 'Add a New Segment Group'. At the bottom of the dialog are 'Back' and 'Add Start' buttons. A tooltip points to the 'Add Start' button with the text 'Click on "Add Start"'. The background shows a sidebar with navigation icons and a main panel with 'View Contacts', 'Draft', and 'Inactive' buttons, and an 'Actions' list including 'Send an email', 'Send a site message', 'Send an SMS', and 'Send a notification email'.

Step: 10

Add a "New Action"



Step: 11

Automation is ready!

You can give it a name, add more actions to it and make this automation active

The screenshot displays an automation builder interface. At the top, there's a header with 'Automations /' followed by a search bar and a 'Save' button. On the right, it shows 'Saved at 17:13', a 'View Contacts' button, and status indicators for 'Active' and 'Inactive'. A central pop-up box titled 'Automation is ready!' contains the text: 'You can give it a name, add more actions to it and make this automation active'. Below this, the workflow is visualized with two trigger boxes: 'Contact subscribes to list Master Contact List and current day of the week (Asia/Calcutta) is Sunday' and 'Contact's current day of the week (Contact's Timezone) is Sunday'. A dashed box labeled 'Add a new trigger' is positioned to the right. These triggers lead to a central junction with a plus sign, which then connects to a green action box: '\$ Add deal "My data source1" for contact'. Below the action box is another plus sign for adding more actions. On the right side, there's a sidebar titled 'Actions' with a search bar and several categories: 'Sending Options' (with sub-items: Send an email, Send a site message, Send an SMS, Send a notification email), 'Conditions and Workflow', 'Contacts', 'CRM', 'Salesforce', and 'CX Apps'. A 'Help' button is located at the bottom right of the sidebar. The left side of the interface features a vertical navigation menu with various icons.

Thank You!

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