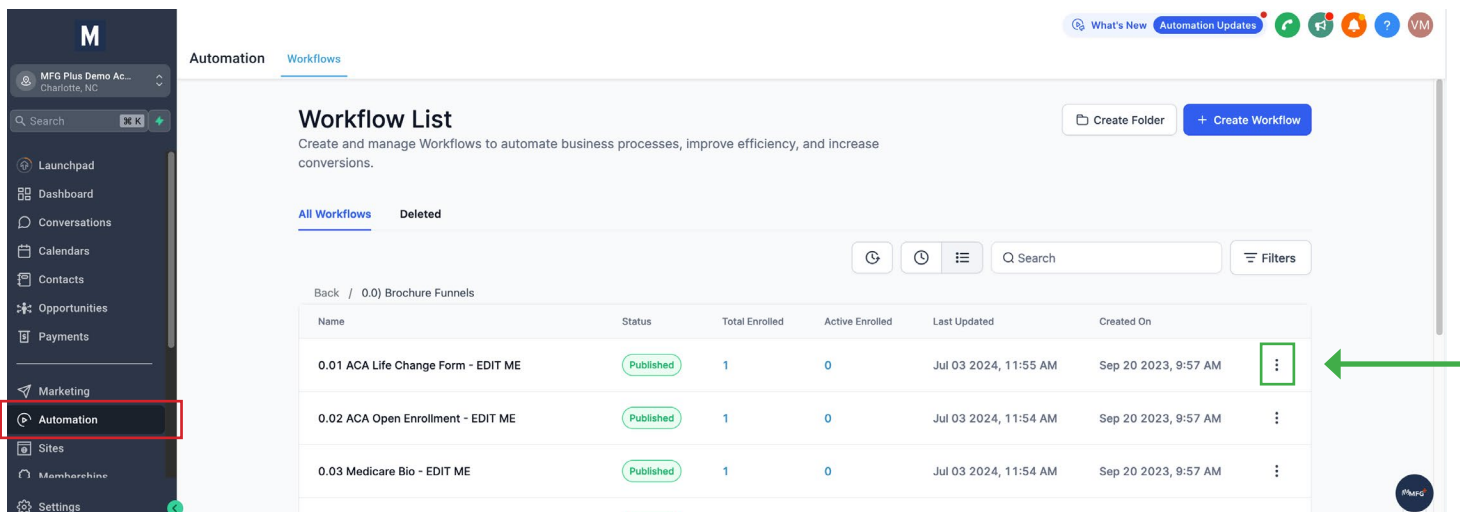
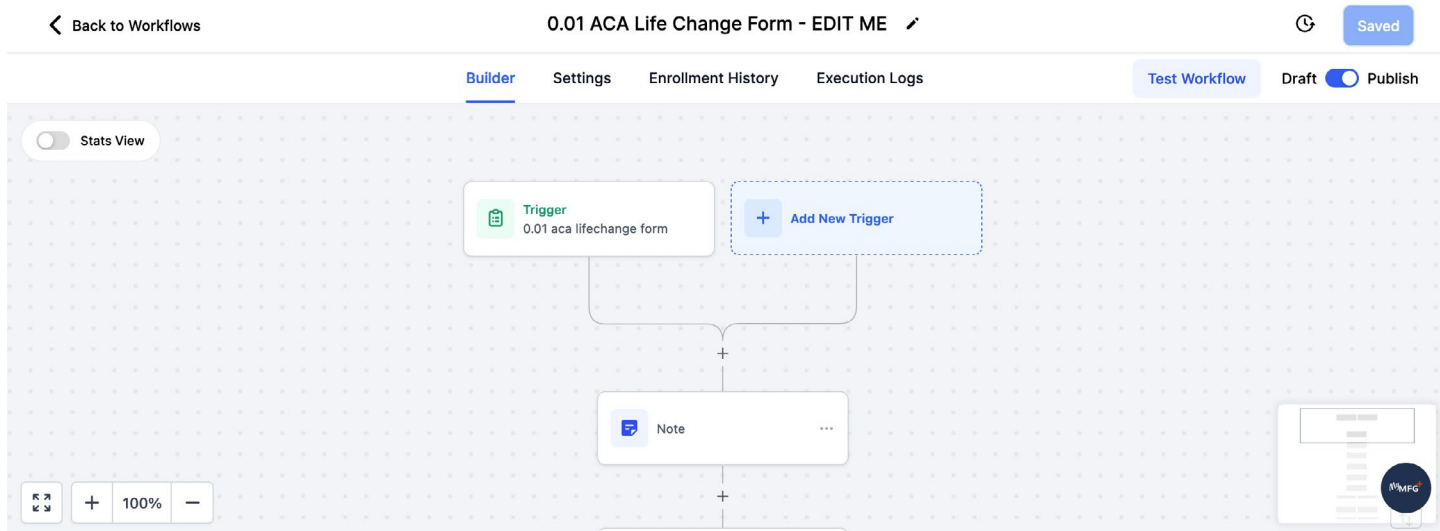


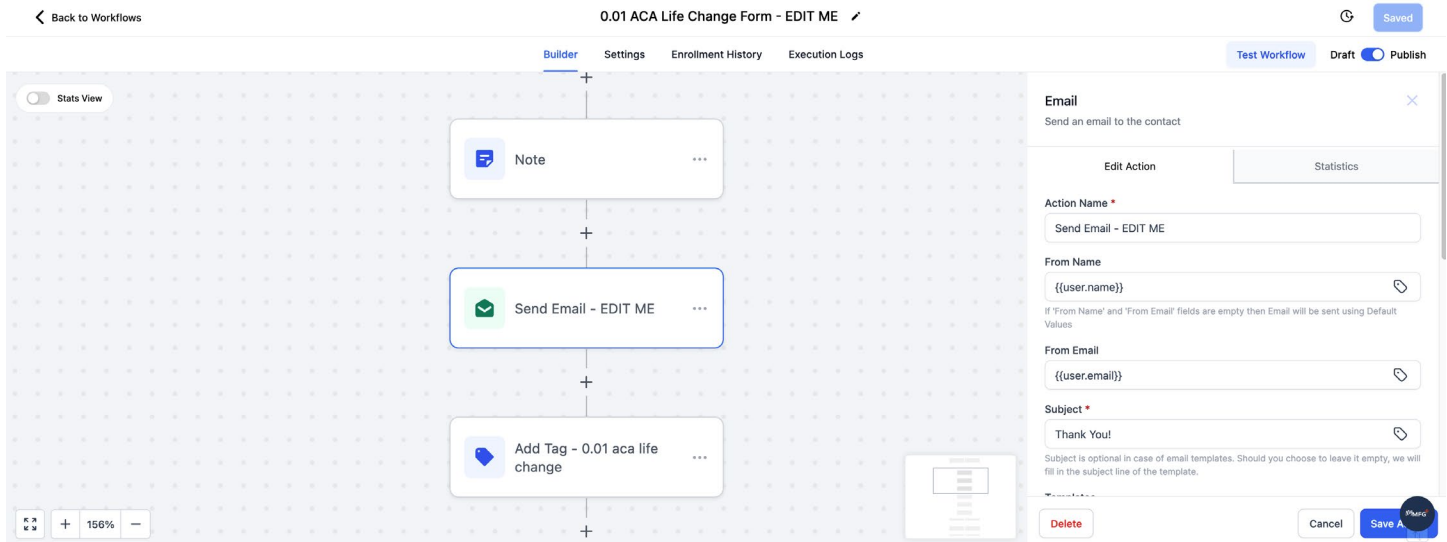
# How to Edit and Turn On Automations



1. Navigate to the **Automation** tab (highlighted above in red) and locate the automation that you wish to edit or turn on. For the sake of this tutorial, we will be working with the ACA Life Change Form automation.
2. To see if an automation is on, check if it says **Published** to the right of the name. To turn on an automation that's off (which will say **Draft**), click on the three dots to the right of the name (highlighted above in green). Next, click the **Publish** option.
3. To edit an automation, double click on the name of the automation you wish to edit.
4. This will take you to the editing window, pictured above. To change the title of the automation, click on the name displayed in the middle and edit the text as you please.



5. To edit a step in the automation, click once on the block you want to edit. These blocks are **triggers** or **actions**. **Triggers** are exclusively used at the beginning of an automation, and define what is used to make the automation start. **Actions** are used to define each step of an automation.
6. Clicking on an action or trigger will pull up a detailed menu on the right side of the screen. The menu will change depending on what kind of trigger or action you're editing.
7. On the next page is an example screen of an action being edited. The action is a **Send Email** action, so the menu allows you to edit the sender name, sender email, receiver email, subject, email content, and if there's any attachments.



8. As seen in the image, in some fields you will have the option to use **Custom Values**. Note the small tag icon in the right side of the **From Name** fields. Custom Values allow you to select a variable that will be filled in by a contact's information. For example, in the **From Name** field, you can see that it says **{{user.name}}**. This is a custom value. Any time you see the use of double braces on either side of text, this denotes that a custom value is being used. Do not remove them.

**Do you want to know how to read a custom value?** Let's do a breakdown of the value **{{user.name}}**:

**{{}}** Denotes the beginning and end of the value.

**Text before the period** (in this case "user") denotes where the information is coming from. The most common are **user** and **contact**. "user" is the owner of the current contact that's going through the automation. "contact" means the information is pulled from the contact in the automation's details.

**Text after the period** (in this case "name") is the specific field that the value is pulling from.

So the value **{{user.name}}** is pulling the **name** of **the current contact's owner**.

The value **{{contact.email}}** would be pulling the **email** of **the current contact**.

The value **{{user.calendar\_link}}** would be pulling the **calendar link** of **the current contact's owner**.

9. To add more custom values, click on the tag icon. This pulls up a searchable and categorized list of all available custom values, as seen to the right. You can use the pre-set values as well as the values of any custom fields that you may have created.

10. When you're done editing an action, don't forget to click **Save Action** in the bottom right, or all your progress will be lost. When you're done editing the whole automation, click **Save** in the top right. You can also publish or draft the automation using the toggle below the save button.

11. For more information on automations, check out the Triggers and Actions Guide.

