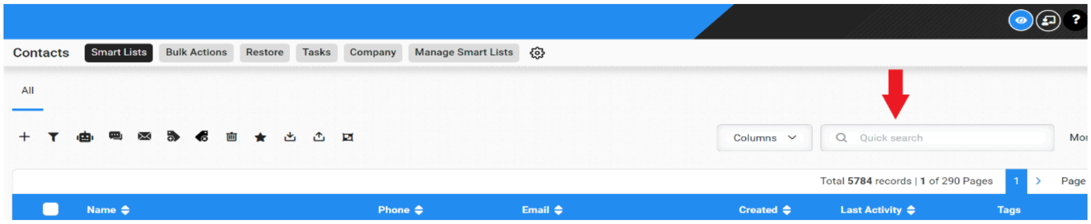
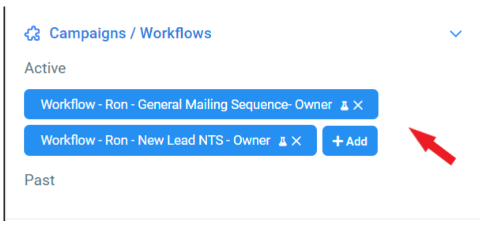
# How To Add A Lead To A Workflow

1. Click on Contacts in the side bar on the left side of the page. The Contacts page will open and you will see a list of contacts.
2. If you need to search for a contact, use the Quick Search box. When you see the contact show up, click on the black circle with their initials next to their name.




Otherwise, select the contact by clicking on the black circle with their initials next to their name. The contact card will then open up.

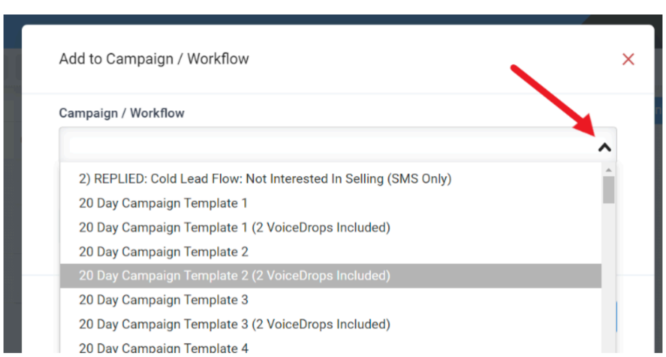
3. On the left side of the contact card, scroll down to the section where you see Tags and Campaigns / Workflows. (you may have to click the blue arrow on the left to open the section to see the tags as well as the active workflows)



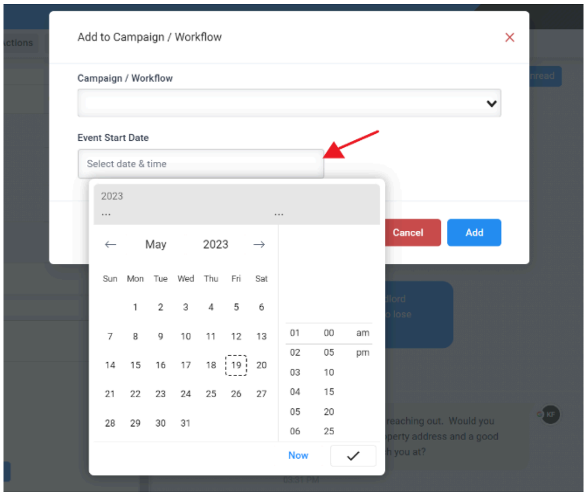

(**BEFORE** adding to a new **texting workflow**, make sure to scroll down a little farther to see if DND has been set for Text Messages. If it has, UN-SELECT that DND or a texting workflow will not work)

Click on the +Add in the blue box of the active workflow section. A new window will pop up.

4. Click on the drop down arrow in the Campaign / Workflow window and then scroll down to find the Workflow you want to add the contact to.



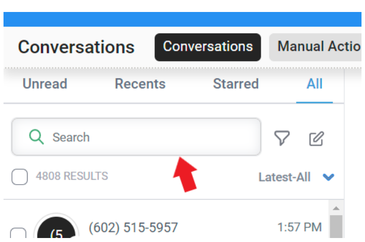
Then click in the Event Start Date box. A calendar box will pop up. Select the date and time you want the lead to launch in the selected workflow. **(Reminder:** Texting workflows are set to default 8am-5pm M-F Arizona time**)**. Then click the checkmark in the bottom right corner. OR if you want to launch the lead in the workflow immediately, select the date and then click the Now button next to the checkmark button at the bottom right.



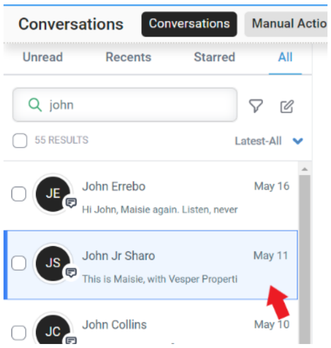

Then click the blue Add button at the bottom right. A confirmation window will pop up for you to either cancel or confirm.

# Alternative Way To Add A Lead To A Workflow

1. Click on Conversations in the side bar on the left side of the page.
2. If you need to search for a contact, use the Search box (make sure to have All selected above that search box)

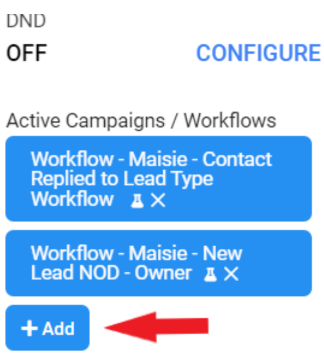



3. Click to highlight the contact's conversation so it will open up on the page



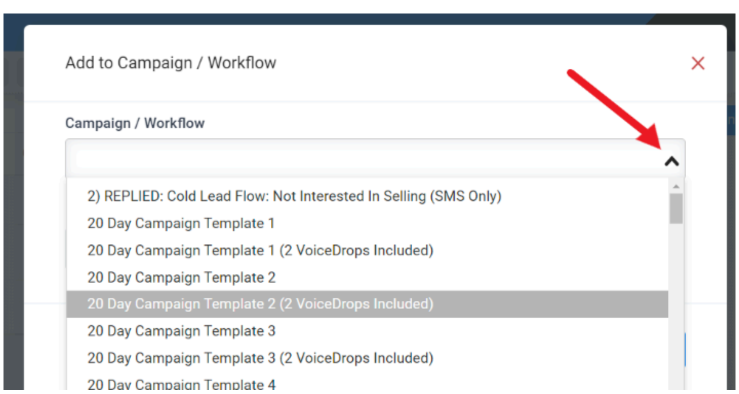

4. On the right side of the page scroll down until you see Active Campaigns / Workflows.

(**BEFORE** adding to a new **texting workflow**, make sure to look right above Active Campaigns / Workflows to see if DND is OFF. If it says ON or PARTIAL, click the blue CONFIGURE for the DND Preferences window to pop up. Make sure Text Messages is unmarked in order for a texting workflow to launch.)

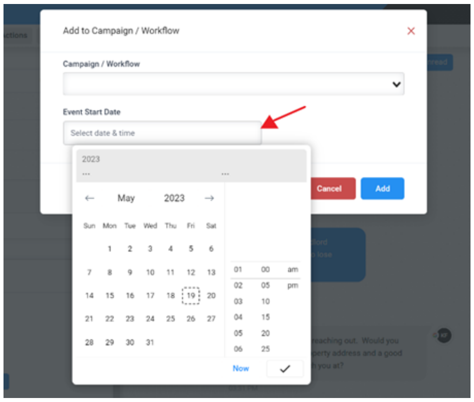



Click on the +Add blue box of the Workflow you want to remove the contact from. A new window will pop up.

5. Click on the drop down arrow in the Campaign / Workflow window and then scroll down to find the Workflow you want to add the contact to.



Then click in the Event Start Date box. A calendar box will pop up. Select the date and time you want the lead to launch in the selected workflow. (Reminder: Texting workflows are set to default 8am-5pm M-F). Then click the checkmark in the bottom right corner. OR if you want to launch the lead in the workflow immediately, select the date and then click the Now button next to the checkmark button at the bottom right.




Then click the blue Add button at the bottom right. A confirmation window will pop up for you to either cancel or confirm.