

Every [marketing automation](#) process consists of a set of interconnected steps. Using steps, you can define automatic (conditional) or user-made branching decisions and various other actions throughout the flow of the process.

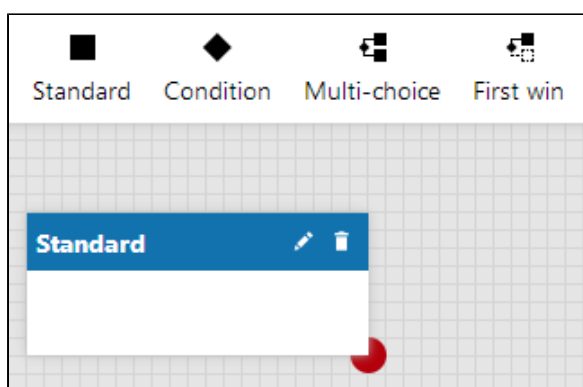
For example, you can designate a user to decide whether the contacts in a given process are prospective clients and should continue through the rest of the process. You can also make the process decide automatically based on each contact's previous behavior, such as purchases made on the website or newsletter subscriptions.

To design the steps of an automation process, edit the process in the **Marketing automation** application.

Placing steps into the designer

1. Click a step button on the designer toolbar and hold down the mouse button.
2. Drag the step onto the grid.
3. Release the mouse button.

The step appears in the grid.



 To learn more about using specific types of steps, see:

- [Defining automatic decisions](#)
- [Defining user choice steps](#)
- [Adding action steps](#)

Placing steps onto existing connections

To add a new step between two existing steps:

1. Click a step on the designer toolbar and hold down the mouse button.
2. Drag the step onto an existing connection between two steps.
 - The connection increases in thickness once it is in the correct position under your mouse pointer.
3. Release the mouse button.

The new step breaks the existing connection and automatically creates two new connections with the original steps.

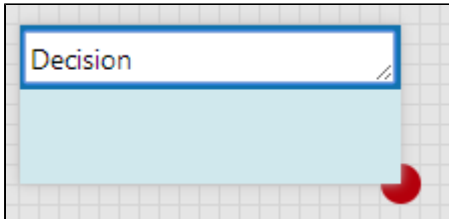


Note: You cannot split connections when moving existing steps, only when adding new steps from the designer toolbar.

Labeling steps in the designer

To change the names of steps in the process designer:

1. Double-click the step's name in the grid.
2. Type in a new name.
3. Press **Enter** to save the new name.




Deleting steps



Note: You cannot delete steps that are currently active (have a contact in them). Before you can delete such steps, you need to [remove the given contacts from the process or move them into a different step](#).

To remove a step from a process:

1. Click  **Delete** in a step's header.
2. Click **OK** in the confirmation box.

Deleting a step also removes the related connections. You need to manually [reconnect](#) the steps that were originally connected to the deleted step.