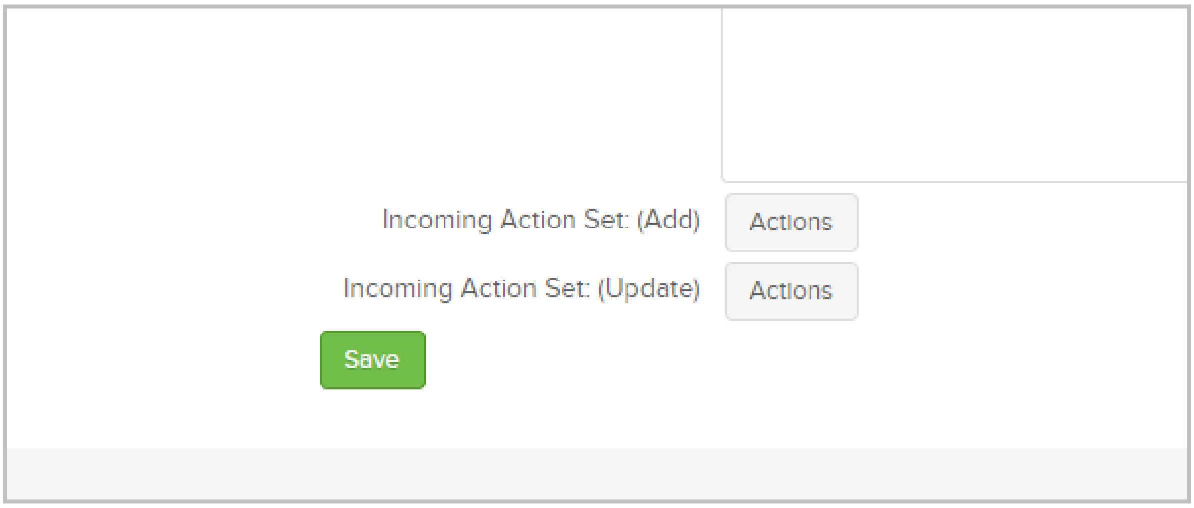
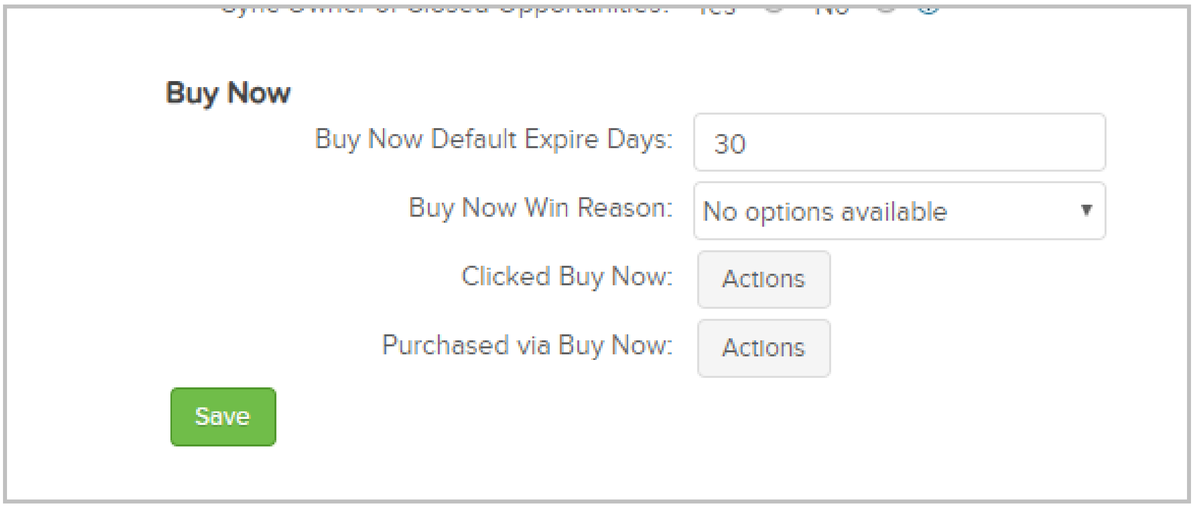
How to create Action Sets and Rules

Action sets can be used both inside and outside of a campaign in order to give you access to additional actions. The most common uses for action sets are:

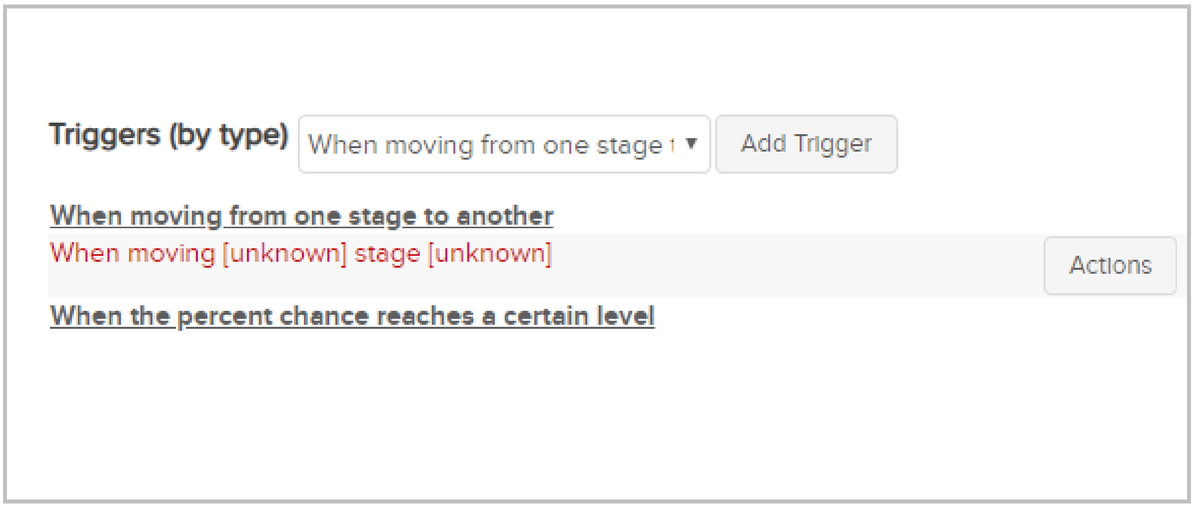
- Purchase Actions
- Billing Automation
- Automation Links
- Run Manually on a search result
- Run Manually on a report result
- An **Admin Action Set Add** and **Admin Action Set Update** (applied to any newly created or recently updated contact respectively.) Found in **Admin > Settings > Application**



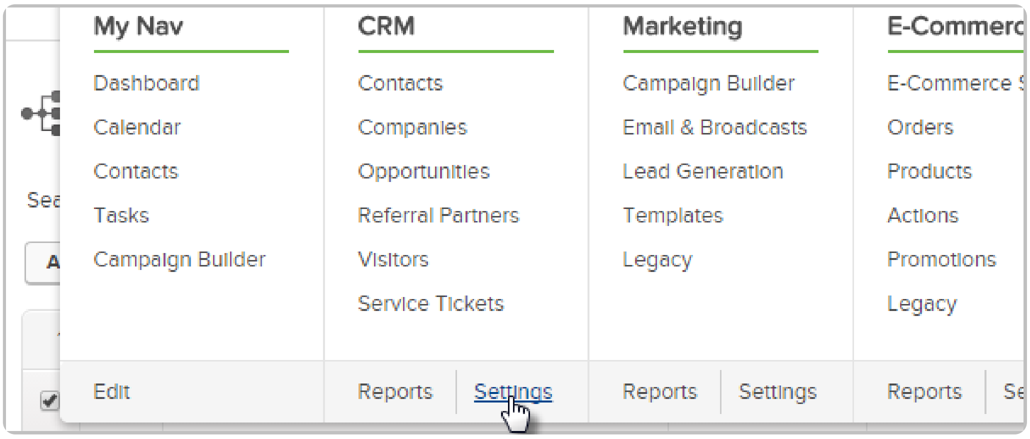
- When someone clicks a Buy Now link from an opportunity record and/or when they purchase from an opportunity record. This is found in **CRM > Settings > Opportunity Defaults**



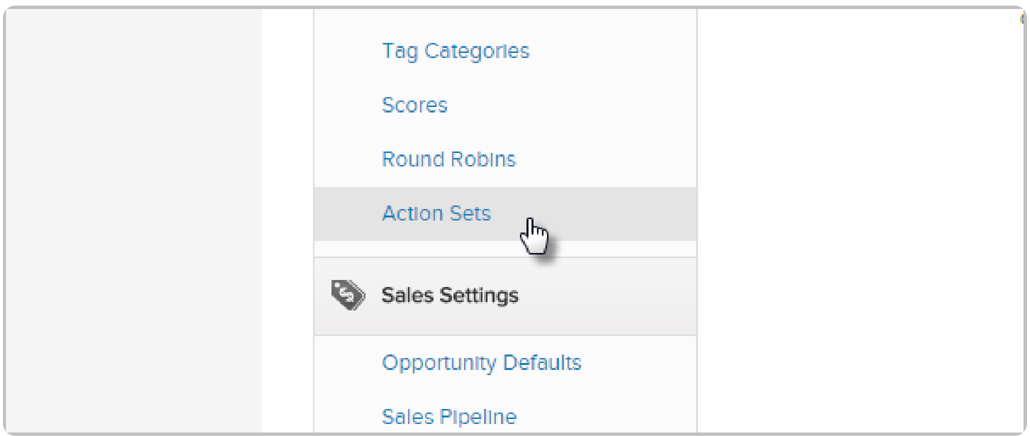
- Pipeline Automation (note that this is a legacy feature that has been replaced by functionality in the campaign builder)



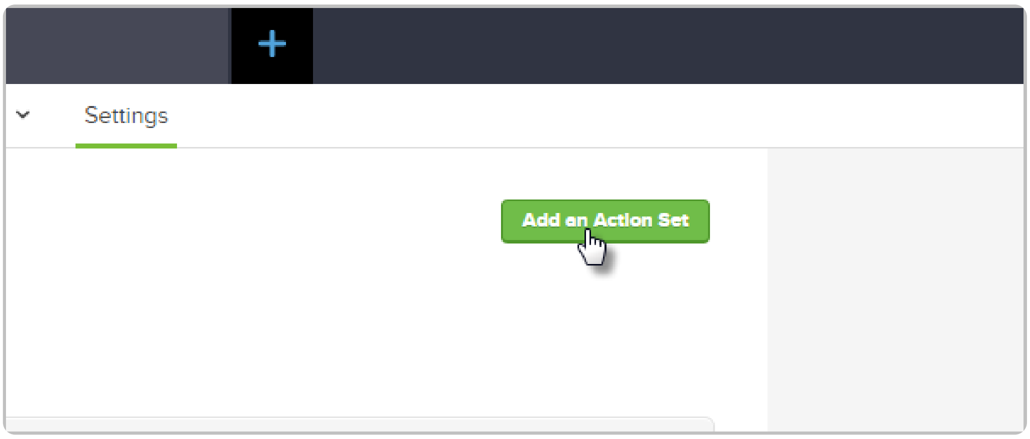
1. Navigate to CRM > Settings



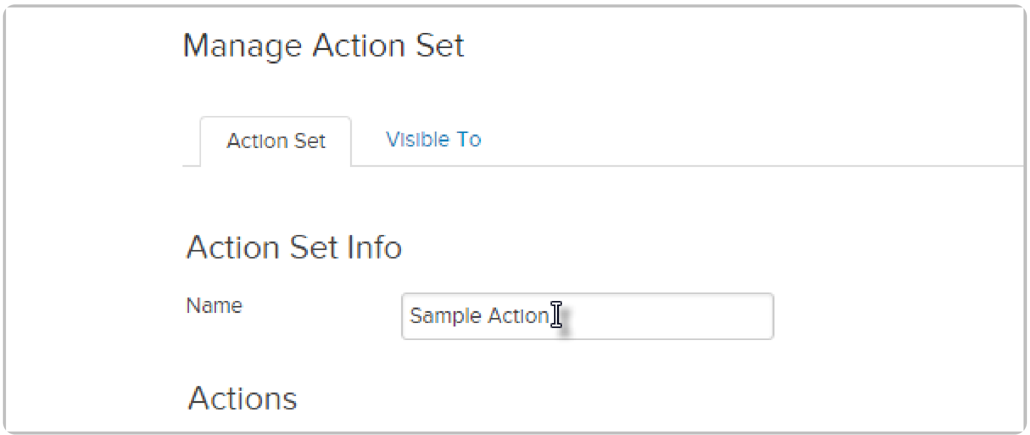
2. Click on **Actions Sets** in the column to the left



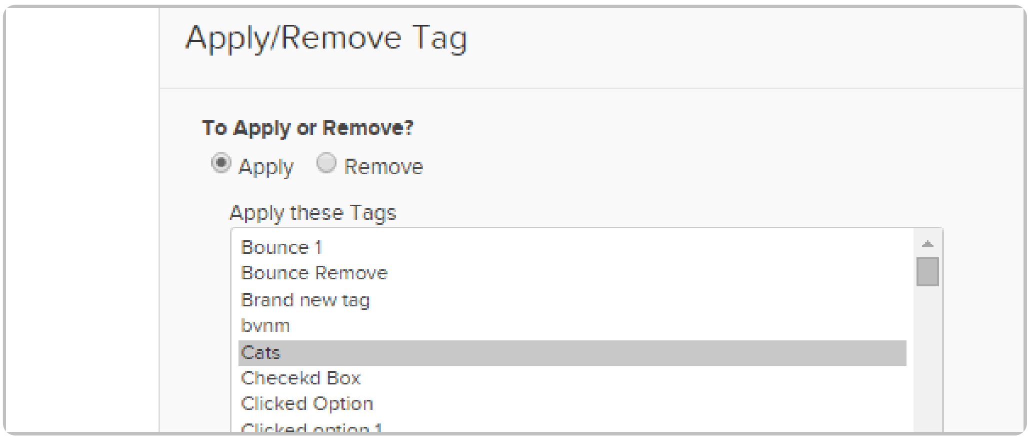
3. Click on **Add an Action Set** in the top right



4. Name your action set

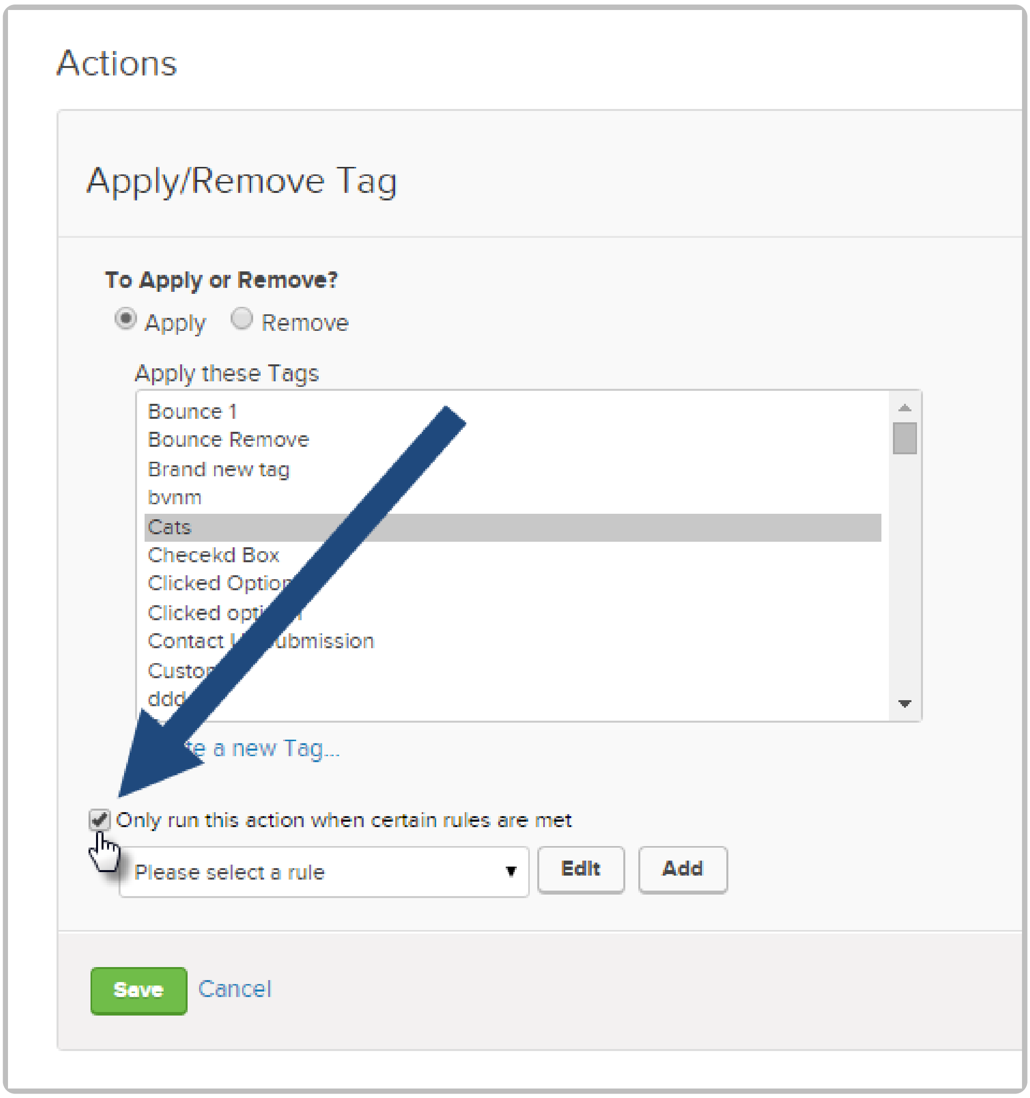


5. Select an action from the Add New Action drop-down. In this example, we chose an action that Applies a tag to the contact.

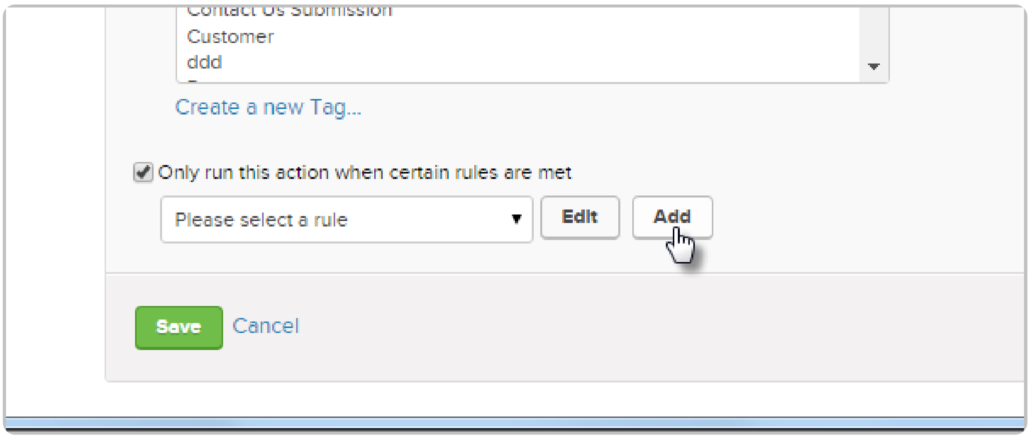


6. (Optional) Set a rule

    1. Click on **Only run this action when certain rules are met** checkbox

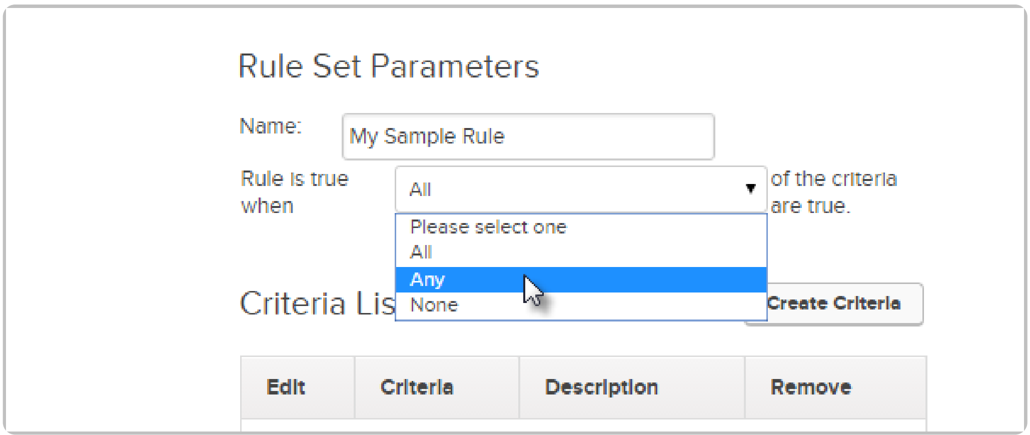


2. Click **Add** to create a new rule.



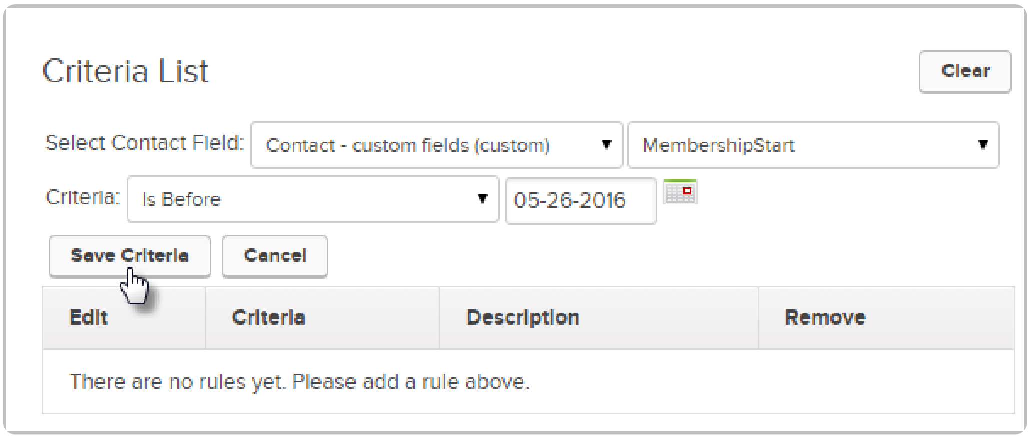
3. Name the rule

4. Choose if the rule is true when *all*, *any*, or *none* of the criteria is true. You can create multiple criteria and use this logic to determine when the action is run.

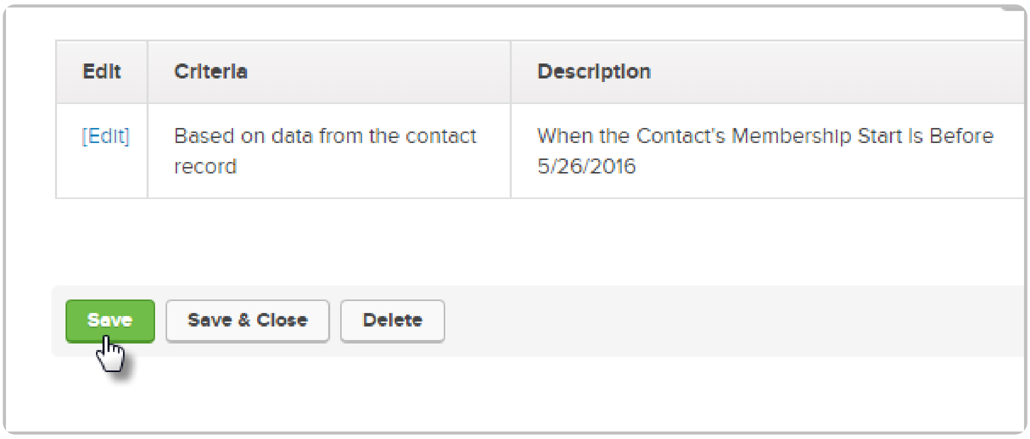


5. Click **Create Criteria**

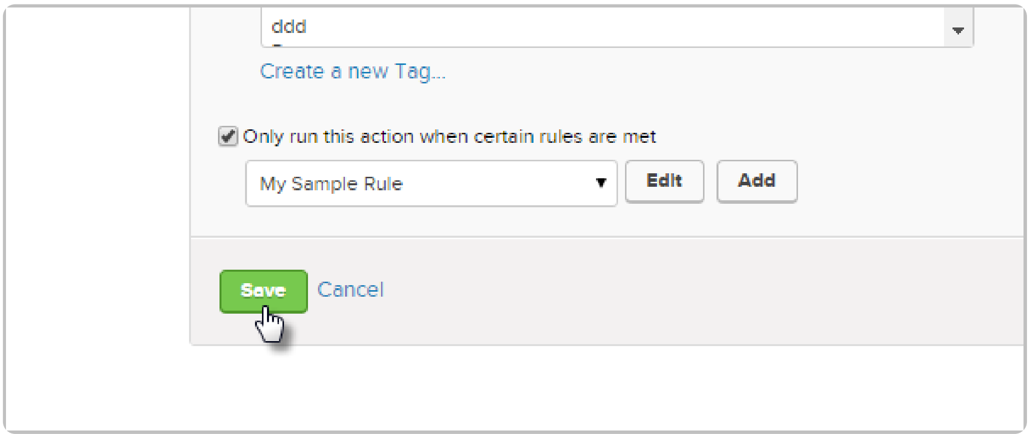
6. Select the field you want to run the rule on and set the criteria. Click **Save Criteria** when you are done.



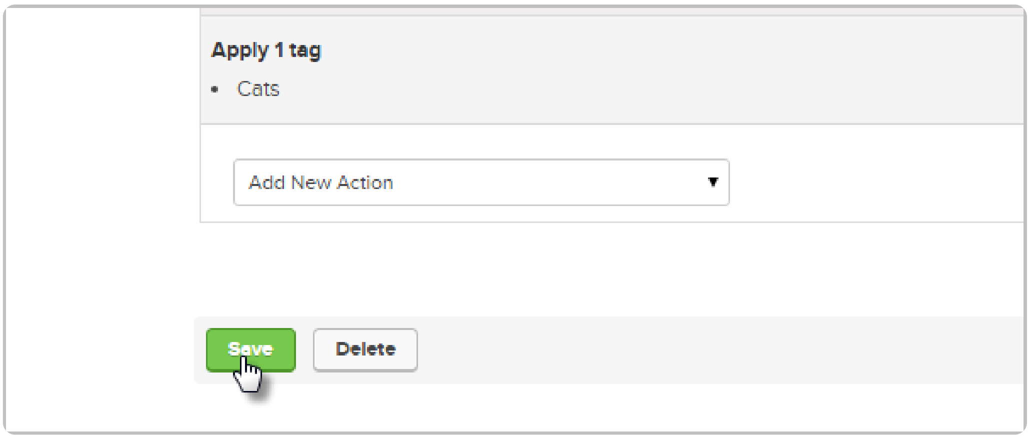
7. Click **Save**



7. Click **Save** on the action



8. Click **Save** on your action set


Apply 1 tag
Cats
Add New Action
Save
Delete