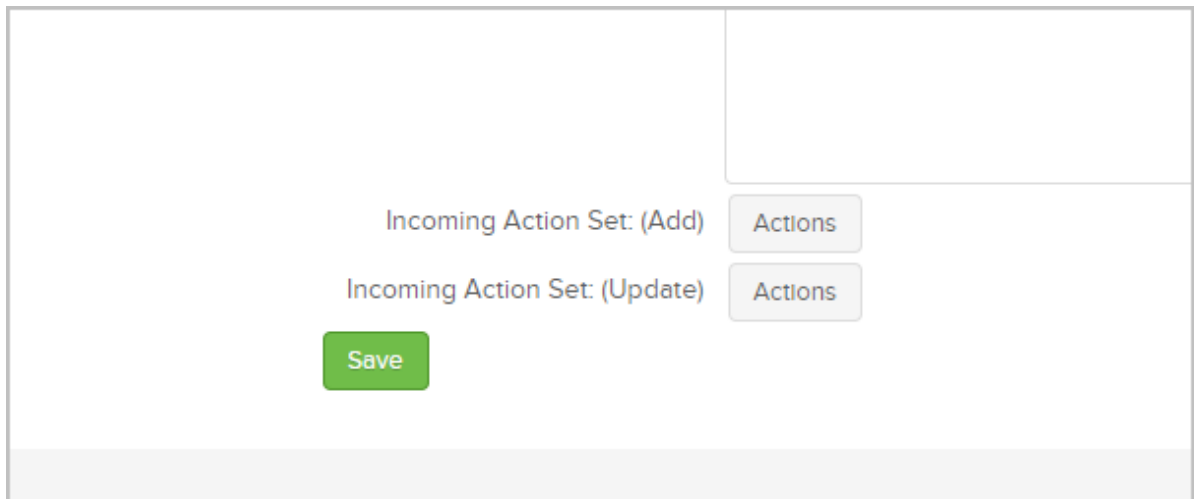


How to create Action Sets and Rules

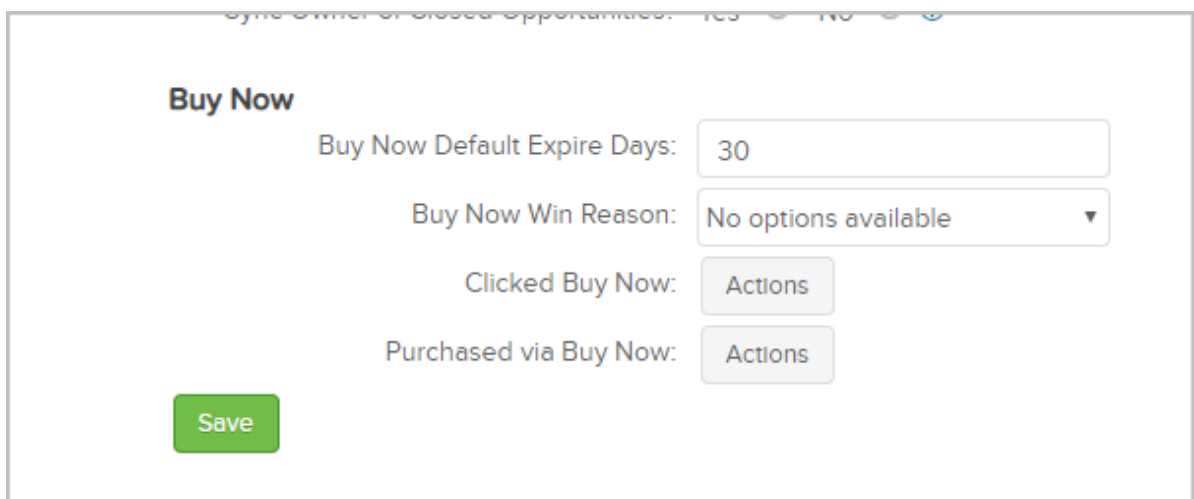
Action sets can be used both inside and outside of a campaign in order to give you access to additional actions. The most common uses for action sets are:

- [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**



The screenshot shows a configuration interface for an Admin Action Set. It features two rows of settings. The first row is labeled "Incoming Action Set: (Add)" and has a button labeled "Actions" to its right. The second row is labeled "Incoming Action Set: (Update)" and also has a button labeled "Actions" to its right. Below these rows is a green "Save" button.

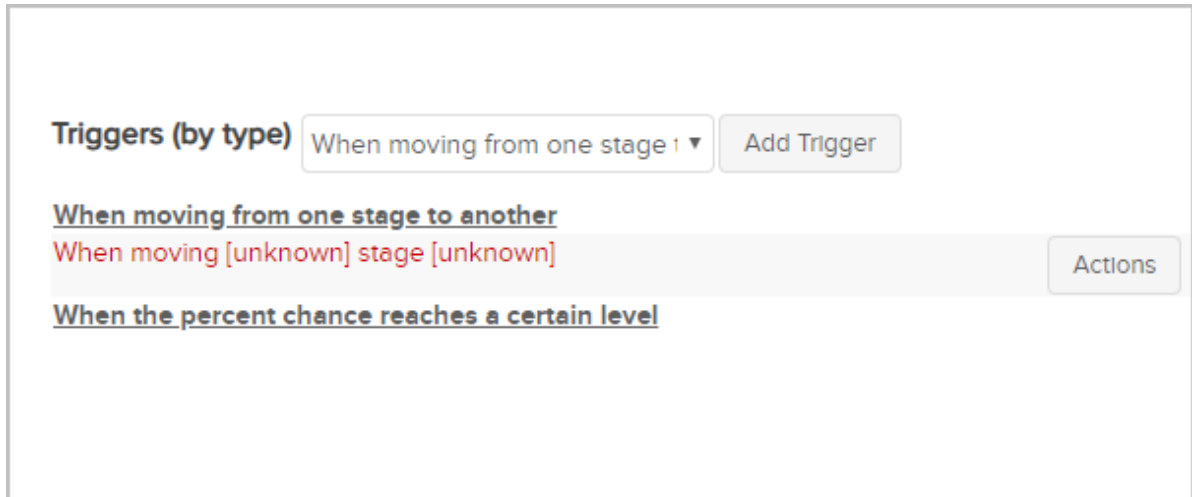
- When someone clicks a Buy Now link from an opportunity record and/or when they purchase from an opportunity record. This is found in **CRM > Settings > Opportunity Defaults**



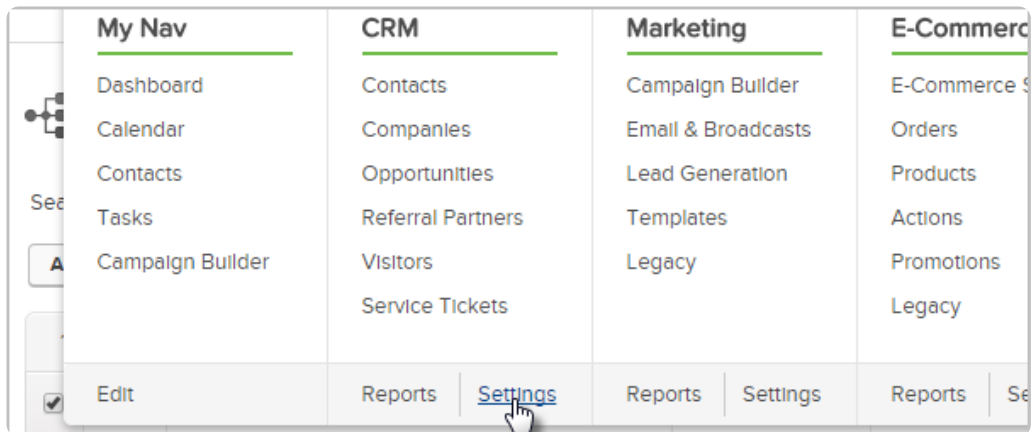
The screenshot shows the "Buy Now" configuration interface. It includes a section titled "Buy Now" with the following settings: "Buy Now Default Expire Days" set to 30, "Buy Now Win Reason" set to "No options available" with a dropdown arrow, "Clicked Buy Now" with an "Actions" button, and "Purchased via Buy Now" with an "Actions" button. A green "Save" button is located at the bottom left.

- Pipeline Automation (note that this is a legacy feature that has been replaced by

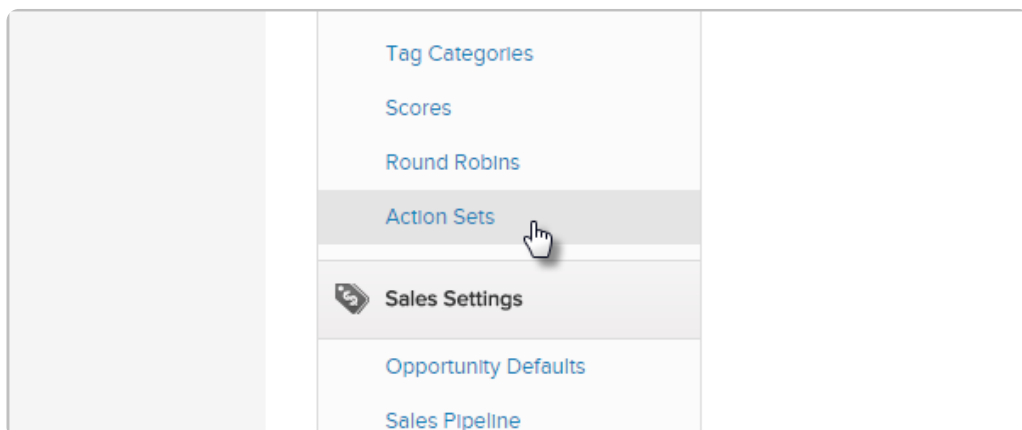
functionality in the campaign builder)



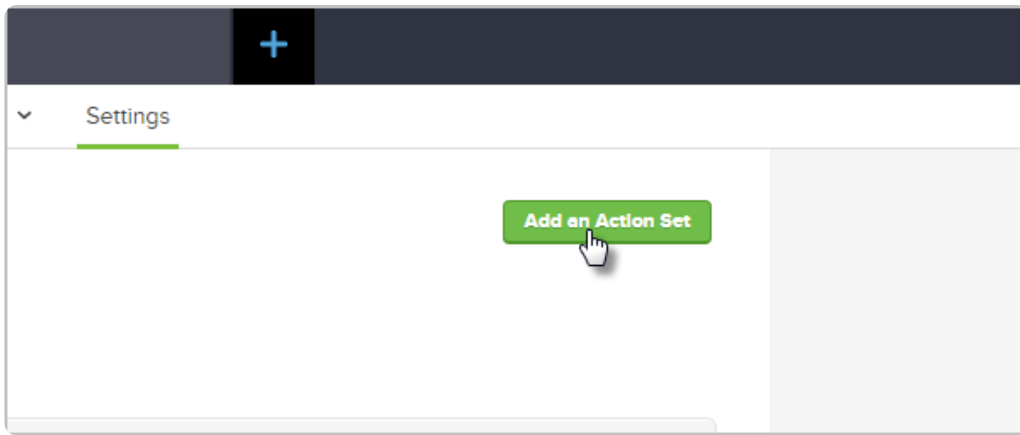
1. Navigate to CRM > Settings



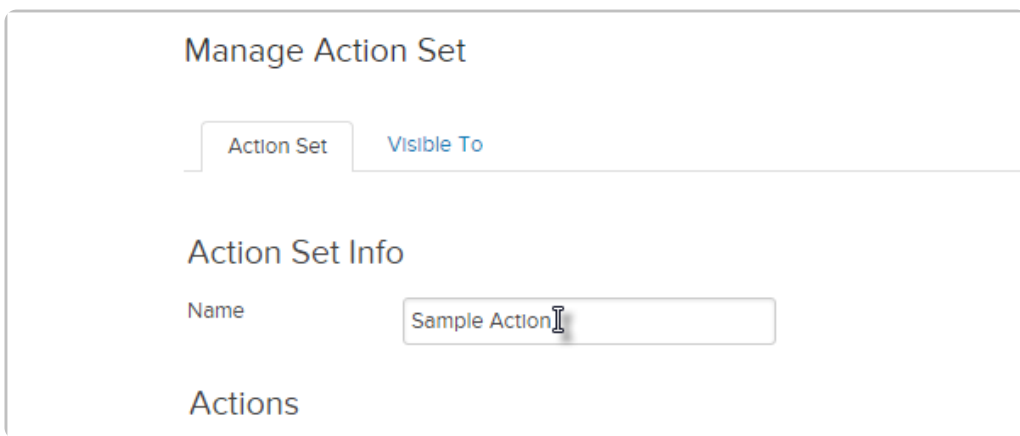
2. Click on Action Sets in the column to the left



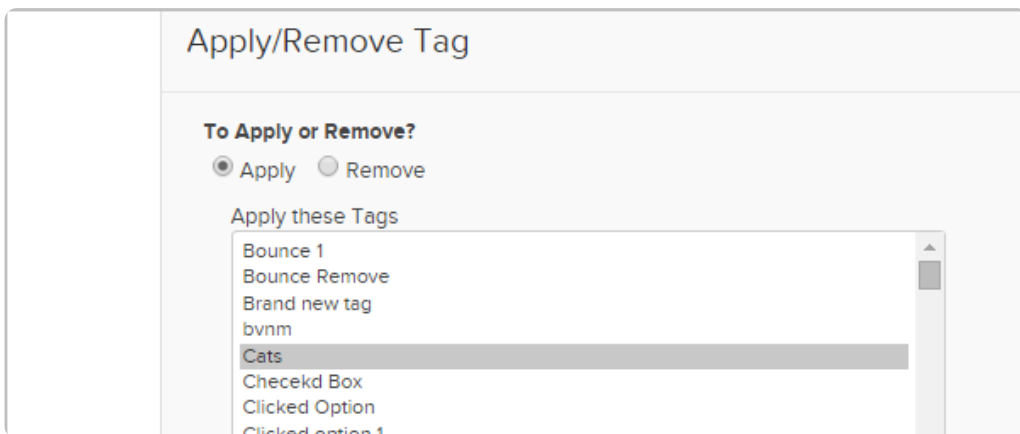
3. Click on Add an Action Set in the top right



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

Actions

Apply/Remove Tag

To Apply or Remove?

Apply Remove

Apply these Tags

- Bounce 1
- Bounce Remove
- Brand new tag
- bvnm
- Cats
- Checekd Box
- Clicked Option
- Clicked option
- Contact L... Submission
- Custom
- ddd

[Create a new Tag...](#)

Only run this action when certain rules are met

Please select a rule

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

Contact Us Submission
Customer
ddd

[Create a new Tag...](#)

Only run this action when certain rules are met

Please select a rule

3. Name the rule

New Rule Set

Choose Name

- 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.

Rule Set Parameters

Name:

Rule is true when All of the criteria are true.

Please select one
 All
Any
 None

Edit	Criteria	Description	Remove

- Click Create Criteria

Name:


Rule is true when Any of the criteria are true.

Edit	Criteria	Description	Remove
There are no rules yet. Please add a rule above.			

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

Criteria List Clear

Select Contact Field: Contact - custom fields (custom) ▼ MembershipStart ▼

Criteria: Is Before ▼ 05-26-2016 

Save Criteria Cancel

Edit	Criteria	Description	Remove
There are no rules yet. Please add a rule above.			

7. Click Save

Edit	Criteria	Description
[Edit]	Based on data from the contact record	When the Contact's Membership Start Is Before 5/26/2016

Save Save & Close Delete

7. Click Save on the action

ddd ▼

[Create a new Tag...](#)

Only run this action when certain rules are met

My Sample Rule ▼ Edit Add

Save [Cancel](#)

8. Click Save on your action set

Apply 1 tag

- Cats

Add New Action ▼

Save

Delete

