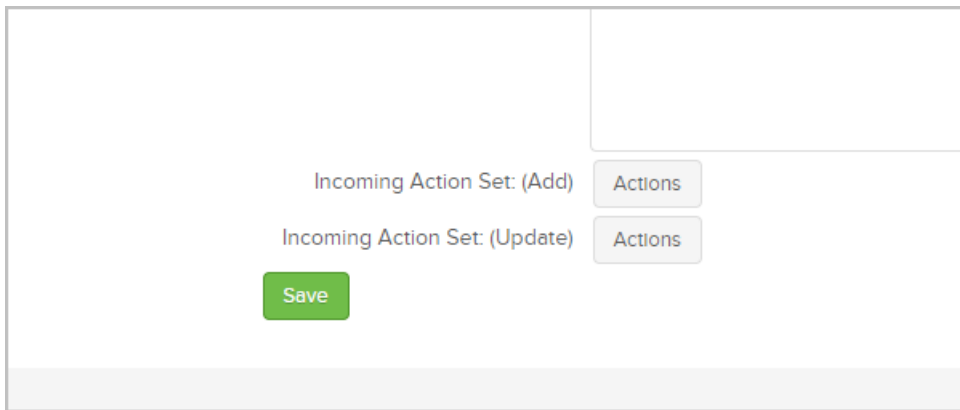


# How to create Action Sets and Rules 🔗

Action sets can be used both inside and outside of a campaign in order to give you access to additional actions.

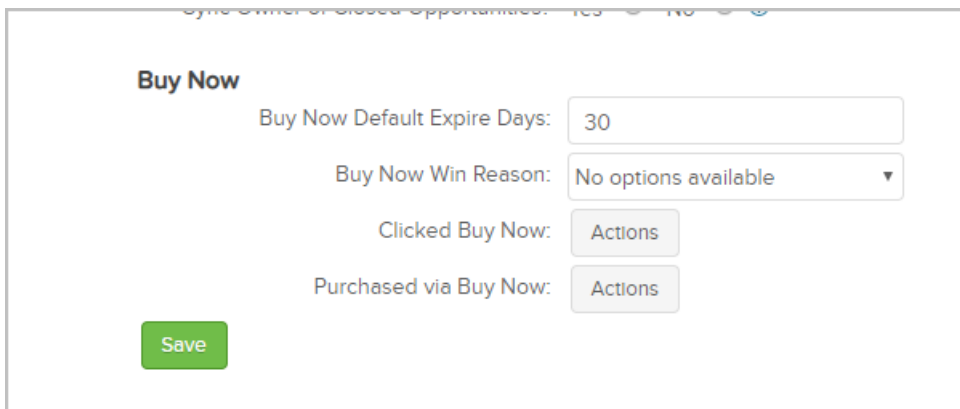
However, action sets cannot run by themselves. They have to first be triggered using any of the following actions:

- [Purchase Actions](#)
- [Billing Automation](#)
- [Automation Links](#)
- Apply Action Set in Campaign Sequence
- 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**



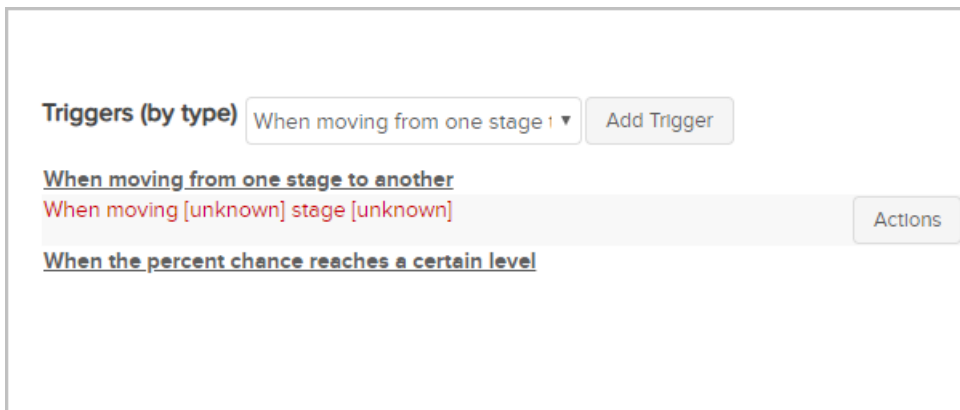
The screenshot shows a configuration interface for an Admin Action Set. It features two rows of settings. The first row is labeled 'Incoming Action Set: (Add)' and has an 'Actions' button next to it. The second row is labeled 'Incoming Action Set: (Update)' and also has an 'Actions' button next to it. At the bottom left of the form 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**

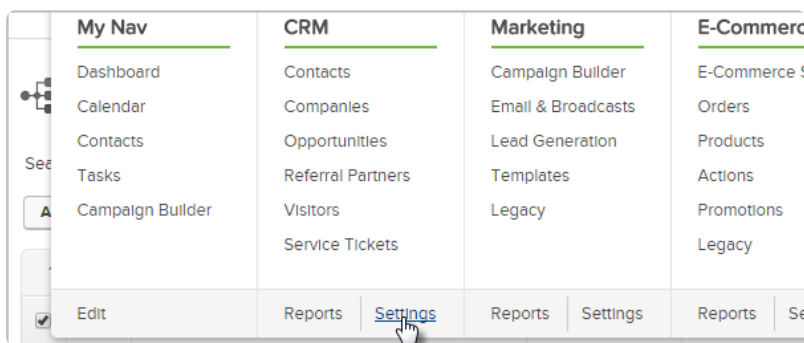


The screenshot shows the 'Buy Now' configuration interface. It includes the following fields and buttons: 'Buy Now Default Expire Days' with a text input containing '30'; 'Buy Now Win Reason' with a dropdown menu showing 'No options available'; 'Clicked Buy Now' with an 'Actions' button; and 'Purchased via Buy Now' with an 'Actions' button. A green 'Save' button is located at the bottom left.

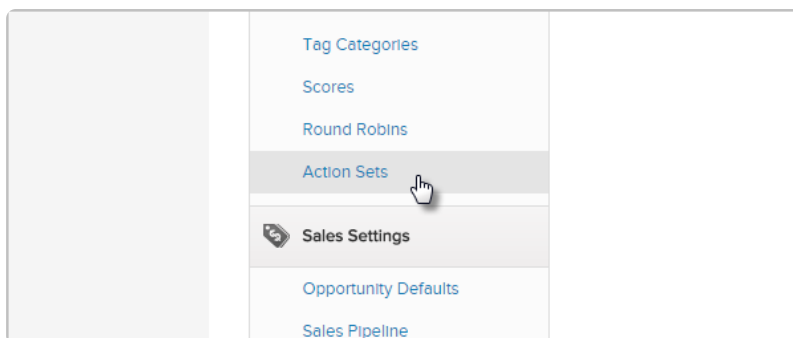
- Pipeline Automation (note that this is a legacy feature that has been replaced by functionality in the campaign builder)



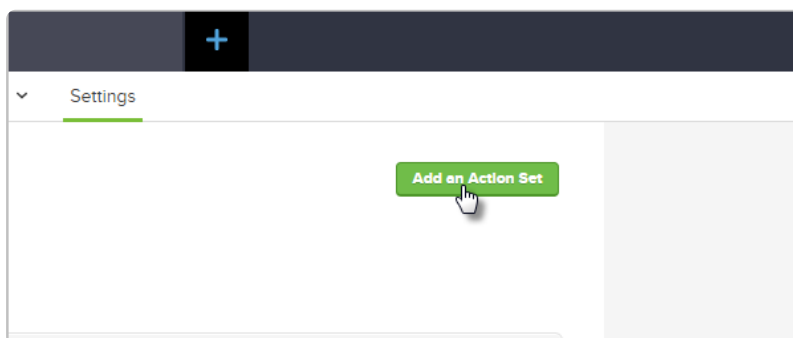
1. Navigate to CRM > Settings



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

Manage Action Set

Action Set Visible To

Action Set Info

Name Sample Action

Actions

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.

Apply/Remove Tag

To Apply or Remove?

Apply  Remove

Apply these Tags

- Bounce 1
- Bounce Remove
- Brand new tag
- bvm
- Cats
- Checekd Box
- Clicked Option
- Clicked option 1

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 List 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 List 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

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.

**Rule Set Parameters**

Name:

Rule is true when  of the criteria are true.

Criteria List

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

5. Click **Create Criteria**

Name:

Rule is true when  of the criteria are true.

Criteria List

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

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

**Criteria List**

Select Contact Field:

Criteria:

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

7. Click **Save**

Edit	Criteria	Description
<a href="#">[Edit]</a>	Based on data from the contact record	When the Contact's Membership Start Is Before 5/26/2016

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

Note! For questions about how to use this feature, please [contact our Support Team](#). To provide feedback on the accuracy of this article, use the form below.