



How-to-instructions on action groups and scheduling a list to an action group

SharpSpring provides ways for you to create powerful automations based on your lead behaviors. Automations in SharpSpring are composed of workflows and action groups, which themselves are composed of various actions or events. This article will provide an overview on action groups.

The Visual Editor

The *Visual Editor* shows how action groups are configured, as well as the logic that defines the group as a whole. This is done by way of a workflow. Every trigger, action, filter, and the like are on full display in how they interact with one another. As such, the Visual Editor allows you to create action groups in a point-and-click fashion in real time.

Creating Action Groups

SharpSpring allows you to create standalone reusable visual action groups. With reusable visual action groups, you do not have to continuously recreate common action groups. SharpSpring's Visual Editor allows you to create these reusable action groups. SharpSpring recommends using the Visual Editor when creating action groups.

To create action groups using SharpSpring's Visual Editor, do the following:

- 1 In SharpSpring's top toolbar, click Automation > Action Groups.
- 2 Click New Action Group.
- 3 Enter a name for the action group.
- 4 Optionally choose a non-default action group folder.
- 5 Optionally, click any of the following checkboxes:
 - Create a time-based action group with a custom DateTime field
 - Make this action group available in the Contact Manager
 - Make this action group repeatable
- 6 Click Add Action Group.





Setting Actions

Once you have created the blank action group, you will need to add and set actions and options in order for it to function. To set actions for an action group, do the following:

- 1 In SharpSpring's top toolbar, click Automation > Action Groups.
- 2 **Create or edit an action group.**
- 3 Under Start or an applicable branch, click + Add > Action. Select
- 4 **the actions to use** in this visual action group.
- 5 Click OK.
- 6 **Add branch options as necessary.**
- 7 Set the action group toggle to Active.

Navigating Action Groups

Once created, you can view action groups in the Action Groups menu. To access the Action Groups menu and navigate its features, click Automation > Action Groups in SharpSpring's top toolbar.

Filter Menus

The Automation Action Groups page offers many different viewing options in that you can filter your various action groups.

The first filter on the Action Groups page is for action group types. This menu allows you to separate Visual Editor automations from Legacy automations. Visual Editor and Legacy automations differ in input mechanics and presentation. The action group content is the same.

The second filter available on the Action Groups page is the active/inactive filter. This filter separates action groups that are active from those action groups that are inactive.

The filter search bar allows you to type in custom search parameters to find applicable action groups.

Folders



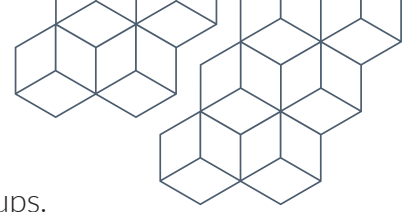
Folders house action groups within.

The folders state how many action groups the house. Clicking on a folder opens the folder and displays all associated action groups.

Folders will display only active or inactive action groups, but not both at once.

The *Miscellaneous* folder is open by default.













Action Groups Information

The Automation Action Groups page displays information associated with action groups.

When viewing action groups in a folder, the following information is displayed:


-  The action group name
-  The action group's creation date
-  The number of actions in the action group
-  The number of workflows the action group is attached to






When comparing visual and repeatable action groups at-a-glance, consider the following:

-  Visual Editor action groups are represented by the  Visual icon.
-  Repeatable visual action groups are represented by the  Repeatable icon.

In addition, visual action groups are listed under Workflows. If an action group is attached to a workflow the word will appear blue. Clicking these blue words will open a pop-up window detailing what the action group is a part of.




Options

The  Options menu allows you to configure an action group. The available options are as follows:

-  Rename action groups.
-  Activate or deactivate action groups.
-  Copy action groups.
-  Schedule action groups.
-  Move action groups to specified folders.

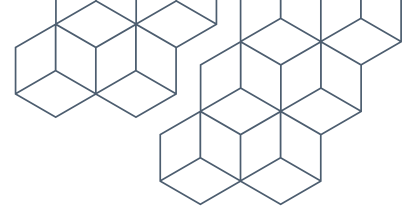
Deactivating Action Groups

To disable an active action group, do the following:

- 1 In SharpSpring's top toolbar, click Automation > Action Groups.
- 2 Set the menu listing to Active.
- 3 Locate the desired action group.
- 4 Click  Options > Deactivate.
- 5 Click one of the following toggles, depending on need:
 -  Do not allow currently scheduled events to fire.
 -  Allow currently scheduled events to fire.


- 6 Click OK.







Activating Action Groups

To enable a deactivated action group, do the following:

- 1 In SharpSpring's top toolbar, click Automation > Action Groups.
- 2 Set the menu listing to Inactive.
- 3 Locate the desired action group.
- 4 Click  Options > Activate.

Removing Contacts from Action Groups


To prevent actions from a scheduled action group from occurring, the contact must be removed from the action group. To remove contacts from action groups, do the following:

- 1 In SharpSpring's top toolbar, click Contacts > Contact Manager.
- 2 Click on the desired contact's name.
- 3 Click the Memberships tab.
- 4 Click  Action Groups.
- 5 Locate the action group that the contact will be removed from.
- 6 Click  Options > Remove.

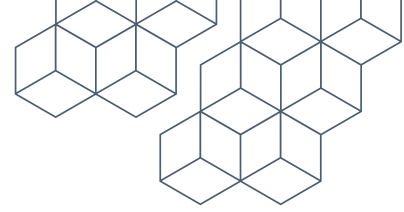
Important: Removing a contact from an action group two separate times results in the contact being considered as excluded. Excluded contacts cannot be added to the action group again.

Scheduling Action Groups

To schedule an action group to a list, do the following:


- 1 In SharpSpring's top toolbar, click Contacts > Lists.
- 2 Locate the desired list.
- 3 Click  Options > Schedule Action Group for List.
- 4 Select an action group from the action group menu.
- 5 Select the time and date parameters.
- 6 Click Schedule Action Group.






Creating Action Group Folders


To create a new folder to house action groups, do the following:

- 1 In SharpSpring's top toolbar, click Automation > Action Groups.
- 2 Locate the desired action group.
- 3 Click  Options > Move to Folder.
- 4 Select New Folder.
- 5 Enter a name for the folder.
- 6 Click OK.

After creating an action group folder, you can edit the folder name at any time in the Action Groups menu. Click the  Edit icon next to a folder to edit the name.


Moving Action Groups

To move an action group from one folder to another, do the following:

- 1 In SharpSpring's top toolbar, click Automation > Action Groups.
- 2 Locate the desired action group.
- 3 Click  Options > Move to Folder.
- 4 Select the folder to move the action group to.


Renaming Action Groups

To rename an action group, do the following:

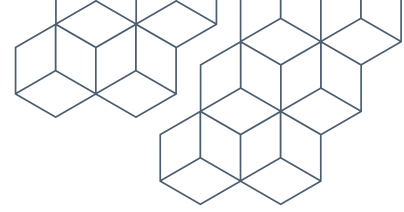
- 1 In SharpSpring's top toolbar, click Automation > Action Groups.
- 2 Locate the desired action group.
- 3 Click  Options > Rename.
- 4 Enter a new name for the action group.
- 5 Click OK.

Copying Action Groups

To copy an action group, do the following:

- 1 In SharpSpring's top toolbar, click Automation > Action Groups.
- 2 Locate the desired action group.
- 3 Click  Options > Copy.
- 4 Enter a name for the copied action group.
- 5 Click OK.





When creating action groups and setting actions, consider the following:


- 📦 Action groups can be set as reusable. Reusable action groups are a collection of standalone events that can be referenced within a visual workflow or be manually scheduled to a list.
- 📦 Action groups can have multiple branches. Branches refer to a collection of actions created for use only within a visual workflow. As the name implies, this collection of actions branch out from the action group and are dependent upon additional criteria in order to function. This means that action groups can be complex and have multiple branches stemming from a single action.
- 📦 Branches are not action groups. Branches will not be added as reusable, standalone action groups.

When scheduling action groups to lists, you can communicate with your leads at a time of your choosing.

This article will detail how to schedule an action group to a list—all without needing a trigger or filter.

Scheduling to Lists

To schedule an action group to a list, do the following:

- 1 In SharpSpring's top toolbar, click **Contacts > Lists**.
- 2 Locate the desired list.
- 3 Next to the list, click  **Options > Schedule Action Group to List**.
- 4 Type the name of the desired list in the text box.
- 5 Enter the appropriate time and date parameters.
- 6 Click **Schedule Action Group**.

Be aware that scheduling action groups to lists can be capped depending on your sender status. For more information on sender status and sending restrictions, refer to [Understanding SharpSpring Email Sender Status](#).

