

1. Set Lead Source to “Webinar” for all form submissions.

Completion Actions

Action	Prospect Field Type	Value	
Set prospect default field	Source	Webinar	
+ Add Action		+ Add Conditional Group	

2. On a form, assign prospects from the state of California to Joe Nelson (or any user in your system) and prospects from the state of New York to Jane Smith.

Completion Actions

Action				
Select...				

Take Action When	Prospect Field Type	Operator		
Prospect Default Field	State	contains		
Value	California			
Action	User			
Assign to user	Joe Nelson			
+ Add Action to Group		Delete Group		

Take Action When	Prospect Field Type	Operator		
Prospect Default Field	State	contains		
Value	New York			
Action	User			
Assign to user	Jane Smith			
+ Add Action to Group		Delete Group		

+ Add Action		+ Add Conditional Group	
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3. On a form, assign all prospects via Salesforce assignment and add all prospects to the campaign “Webinar” as “Responded .” Notify Jen Kazin of any prospects who fill out the form and are on the “Customers” list.

Completion Actions

Action
Assign prospect via Salesforce active assignme

Action
Add to campaign

Campaign
Webinar

Campaign Member Status
Responded

Take Action When
Prospect List

Operator
is member of

Prospect List
Customers

Action
Notify user

User
Jen Kazin

+ Add Action to Group

+ Add Action

+ Add Conditional Group

Delete Group

4. Assign only prospects in campaign “Event Signup” to Salesforce. (Selective Salesforce assignment)

Completion Actions

Action
Select...

Take Action When
Prospect CRM Campaign

Operator
is

Campaign
Event Signup

Action
Assign prospect via Salesforce active

+ Add Action to Group

+ Add Action

+ Add Conditional Group

Delete Group

5. On a form, any prospect who has a custom field “tshirt color” is “red,” add tag “run red tshirt automation” and add to list “Trade Show Campaign.”

Completion Actions

Take Action When	Custom Field	Operator
Prospect Custom Field	tshirt color	contains
Value		
Red		
Action	Tags	
Add tags	run red tshirt automation	
Action	List	
Add to list	Trade Show Campaign	

+ Add Action to Group Delete Group

+ Add Action + Add Conditional Group

6. Add prospects who have clicked an email link to the “Webinar” campaign in an email.

Completion Actions
Automatically take action when a prospect:

Opens this email

Clicks a link in this email

Which link?
Any link

Action	Campaign	Campaign Member Status
Add to campaign	Webinar	Responded

+ Add Action

Unsubscribes through this email

7. In an email, update the custom field “Unsubscribed Email” with the word “New Product Update” (Name of email) when prospects unsubscribe. Doing this on all your emails allows you to track which emails had the most unsubscribes.

Completion Actions
Automatically take action when a prospect:

- Opens this email
- Clicks a link in this email
- Unsubscribes through this email

Action	Custom Field	Value
Set prospect custom field	Unsubscribed Email	New Product Update

[+ Add Action](#) [+ Add Conditional Group](#)