

Creating & Optimizing Automation Rules for Quack

What is a Salesloft Automation Rule

Automation rules are a Salesloft feature which automates actions such as tagging, sequencing & more. To create an automation, navigate to settings & click on Automation Rules (Found under "Data")

Automation Rule Ideas

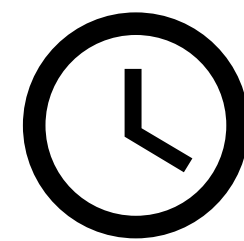
Learn more about AR's through the below links:

[How to Create a Trigger](#)
[Trigger Examples](#)

1

Time Zone Triggers

Automatically adds time zone tags to prospects based on (1) Location or (2) Area code



[Walkthrough](#)

2

No Number Trigger

Automatically tags prospect as "No Number" so that these call tasks can be skipped at scale



[Walkthrough](#)

3

Night Dials Trigger

Automatically adds "Night Dials" trigger to prospect so that you can filter out these tasks for later in the evening, or skip them.



[Walkthrough](#)

4

Sequence Change Trigger

Automatically moves prospect to a different sequence based on a certain disposition, such as moving a prospect to Nurture after "Answered - Reach out in 6 months".



[Walkthrough](#)

5

Auto-sequence Inbound Lead

Used to automatically drop an inbound lead into an Outreach sequence



[Walkthrough](#)

6

Prospect Stage Change Trigger

Automatically change the stage of a prospect based on the call disposition.



[Walkthrough](#)

Time Zone Triggers (EST)


Step 1: Name Automation Rule


We will create a separate rule for each time zone, based on prospect location:


(1) **EST Time Zone**, (2) CST Time Zone, (3) PST Time Zone, (4) MT Time Zone, (5) International


Step 2: Set Trigger


To create an automation rule, first select trigger category:


 Person Updates


 Account Updates


 Opportunities

 Engagement


 CRM Data Sync

 Cadence Progression

 Meetings

 Find Trigger

Select trigger:

- ☒ When a person changes in Salesloft 
- Use the **has changed** or **has changed to** operators in your criteria to prevent frequent triggering.
Keep in mind that the following events are considered as person changes:
 - Changes of any person field in Salesloft
 - Person is created in Salesloft
 - Person added to/removed from/changed step in Cadence

Step 3: Set Criteria

Follow entries below, this trigger will fire if the location of the prospect is in an EST zone. You'll need to create a criteria for each state: CT, DE, FL, GA, IN, KY, NJ, NH, MI, MA, MD, NC, OH, PA, RO, SC, QC, ON, WV, VA, VT, TN, NY, ME, Ontario, Quebec, Nunavut, Connecticut, Maryland, New York, Rhode Island, West Virginia, Delaware, Massachusetts, North Carolina, South Carolina, Georgia, New Hampshire, Ohio, Vermont, Maine, New Jersey, Pennsylvania, Virginia, Tennessee, Michigan


Next, specify criteria if needed: Join by: **OR** ▼


State ▼

equal ▼

CT

+






OR


State ▼

equal ▼

DE

+






OR


State ▼

equal ▼

FL

+





Step 4: Set Action

Finally, set up an action for this rule:

Add Tags to Person ▼ 

EST X

Repeat this process to create automation rules for other time zones, changing the criteria to the applicable states for each zone.


No Number Trigger


Step 1: Name Rule "No Number Tag"


Step 2: Set Trigger


Follow entries below while leaving the "Add account conditions" field blank, we won't need that for this trigger.


To create an automation rule, first select trigger category:


 Person Updates


 Account Updates


 Opportunities

 Engagement


 CRM Data Sync

 Cadence Progression

 Meetings

 Find Trigger

Select trigger:

- ☒ When a person changes in Salesloft 
- Use the **has changed** or **has changed to** operators in your criteria to prevent frequent triggering.
Keep in mind that the following events are considered as person changes:
 - Changes of any person field in Salesloft
 - Person is created in Salesloft
 - Person added to/removed from/changed step in Cadence

Step 3: Set Criteria

Follow entries below, this trigger will fire if the location of the prospect is in an EST zone.

Criteria [Learn how to set a criteria](#)

Home Phone is null AND Mobile Phone is null AND Phone is null

^

Next, specify criteria if needed:

Join by: AND v

Home Phone v

is null v

+





AND

Mobile Phone v

is null v

+





AND

Phone v

is null v

+





Step 4: Set Action


Action [Learn what actions are](#)

Add Tags to Person (No numbers)

^

Finally, set up an action for this rule:

Add Tags to Person v



No numbers X

+ Add Action


Night Dials Trigger


Step 1: Name Rule "No Number Tag"


Step 2: Set Trigger


Follow entries below while leaving the "Add account conditions" field blank, we won't need that for this trigger.


To create an automation rule, first select trigger category:


 Person Updates


 Account Updates


 Opportunities

 Engagement

 CRM Data Sync


 Cadence Progression

 Meetings

 Find Trigger

Select trigger:

- ☒

When a person changes in Salesloft 

Use the **has changed** or **has changed to** operators in your criteria to prevent frequent triggering.


Keep in mind that the following events are considered as person changes:

 - Changes of any person field in Salesloft
 - Person is created in Salesloft
 - Person added to/removed from/changed step in Cadence


Step 3: Set Criteria


Follow entries below, this trigger will fire if the location of the prospect is in an EST zone.


Criteria [Learn how to set a criteria](#)

Country equal Australia OR Country equal India OR Country equal China OR Country equal Singapore OR Country equal Tokyo 




Next, specify criteria if needed:

Join by: OR 


Country 


equal 

Australia






OR


Country 


equal 

India






OR


Country 


equal 

China






OR


Country 


equal 

Singapore






OR

Country 


equal 

Tokyo





Step 4: Set Action


Action [Learn what actions are](#)


Add Tags to Person (Night Dialz) 

Finally, set up an action for this rule:

Add Tags to Person 



Night Dialz 

 Add Action