ServiceAutopilot™

AUTOMATIONS

USER GUIDE

V3.02

Contents

What Automations Can Do for You

Automations from Service Autopilot can save you time and money by improving efficiency. Even tasks that involve multiple resources can be automated, and the automation can be reused for similar events.

You might want to use Automations for:

- Invoicing Follow-ups
- Estimate Follow-ups
- Appointment reminders
- Upsells by month
- Sales progress
- Client reactivation
- Credit card failures

Scenario: Follow-Ups

For instance, you need to keep track of when to send follow-ups, and which employee to assign to each. You can build an automation for this process:

"As soon as this visit is complete, let's send a follow-up email from the person assigned to it; and create a Ticket to remind that same resource that the email was sent. Finally, if the client doesn't respond, remind the resource to make a follow-up phone call."

Any time the designated visit is completed, it triggers the automation. The email is sent and the Ticket created for whoever is assigned the visit. No lists or spreadsheets to maintain, and no need to manually create the email or Ticket.

Automations Save You Time and Money

An automation might be long and complex, like the process of converting a lead to a client with a scheduled service; or it might be simple, like the appointment reminder above. Either way, automations can help your business to run smoothly and keep things from falling through the cracks. In the end, it's all about saving time and making money.

Getting Started with Automations

The Automations feature is one of the most advanced and complex parts of Service Autopilot, available only as part of a higher-level Member subscription. This guide covers the various Automations screens and processes, with a basic introduction and walk-through of each.

Enable Automations

A Service Autopilot Customer Support Rep must enable Automations.

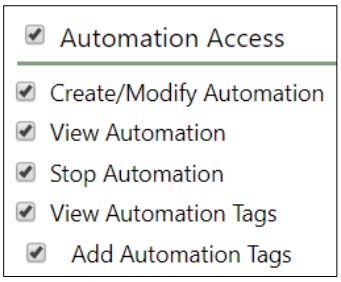
Permissions for Automations

There are a few Permissions associated with using Automations.

Go to **Settings > User Roles and Rights** and choose a role to edit. Look under the **CRM** tab for Automation Access rights.

To access Automations, the "View Automations" permission must be checked.

Automation access is divided into creating, modifying, and stopping, since you may have a few users creating automations, but you also may want to limit who can stop an automation.



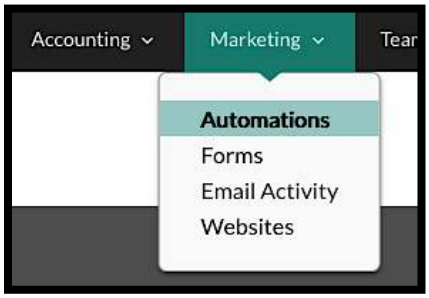
"Work smarter... not harder"

-- Allen F. Morgenstern

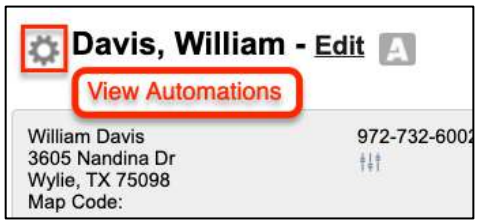
Find Automations in Service Autopilot

To access Service Autopilot Automations, follow these steps.

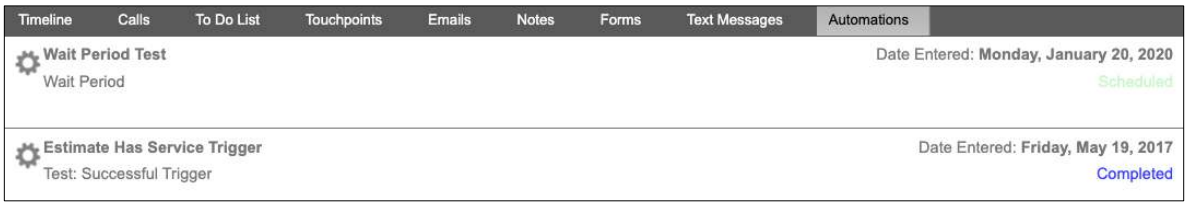
1. Go to: **Marketing > Automations**.



2. Go to a V2 Client Account screen. Click the cog icon next to the name on the account to view the Automations Pipelines for that Account and the status of each Automation.

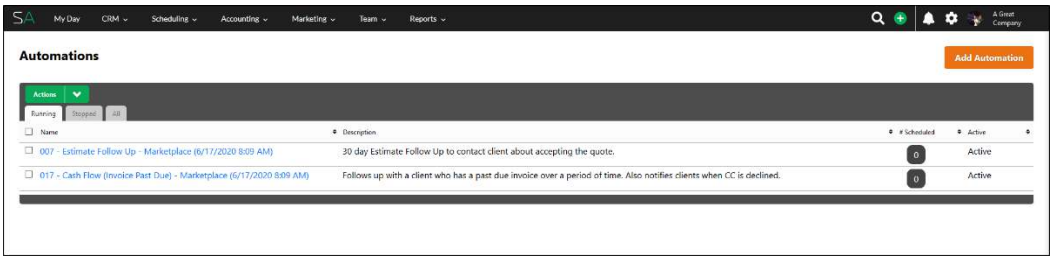


3. On the **Client Account** screen, you also can click the "Automations" tab in the **Timeline** see any automation that the client has entered, along with its status.



Manage Automations

From the **Automations** list (**Marketing > Automations**), you can manage and update your automations, depending on your permissions.



1. Select the check box next to one or more automations.
2. However over the **Actions** button.
3. Click one of these actions: **Add**, **Stop**, **Start**, **Delete**, or **Copy**.

Deactivate an Automation

1. Select the check box next to one or more automations.
2. Hover the **Actions** button and click **Stop.**
3. On the confirmation message, click **OK** to confirm your choice.

Once you've stopped an automation, it moves to the "Stopped" tab and displays as **Inactive**. Any instances of this automation in progress will stop immediately, and clients will be removed from it.

Reactivate an Automation

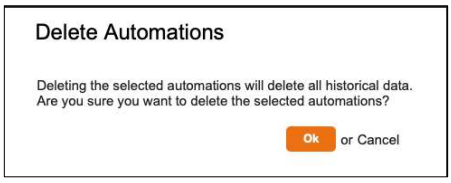
1. Select the check box next to one or more automations, hover the **Actions** button, and click **Start**.
2. This moves any stopped automations back to the "Running" tab.

Note: When re-starting an automation, the automation needs to be opened for the sequences/events to be switched back on. Re-starting an automation will not automatically switch on sequences and events if they were switched off.

Delete an Automation

1. Select the check box next to one or more automations, hover over the **Actions** button, and click **Delete**.

2. On the confirmation message, click **OK** to confirm your choice.



Note: *Stopping* an automation only suspends it, while *deleting* it will remove all the historical data attached to the automation.

Copy an Automation

1. Select the check box next to one or more automations.
2. Hover over the **Actions** button and click **Copy.**

   A new, identical version of the automation is created, with the current date in the new version's name field.

3. Edit this automation, including the name, as you like.

Check Automations Instances

The **# Scheduled** column shows how many instances of this automation are running with clients. It may display 0, 3, 300, etc. Click the number to open the Automation Sequence Pipeline overlay, which displays details of the automation.

Create and Edit an Automation

Before you begin adding automations, plan the steps you are considering. Draw the automation, physically, to make sure you are thinking through each step of the process. This will make creating your automation go more smoothly.

Naming Convention for Automations

The best practice is to use the format **###- Automation Name**. Doing so lets you more easily group your assets, including forms, tags, and automations.

Add or Edit Automations

Go to **Marketing > Automations**.

You can add or edit an automation in one of three ways:

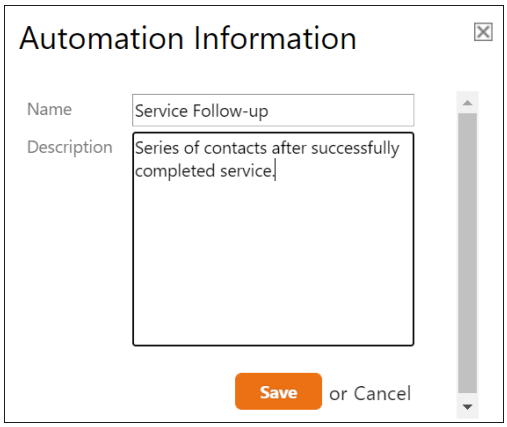
- Click the **Add Automation** button at the top right of the screen
- Click the **Actions** button and then click **Add Automation**
- Click an existing automation's Name or Description cells on the main screen.

This opens the **Automation Edit** screen.

New Automations Information

When you add a new automation from the main screen, the **Automation Information** dialog appears.

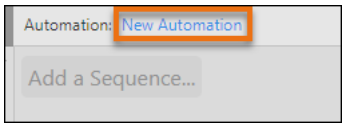
1. Enter a Name and Description, then click **Save**.



The name and description you entered appear at the top of the **Automations** screen.

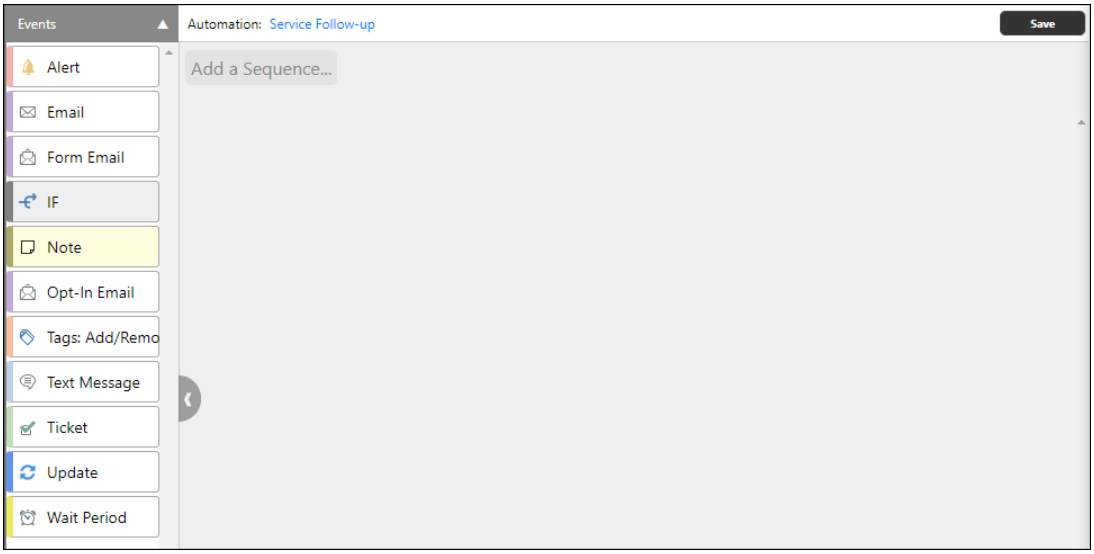
If you click "**X**" or **Cancel**, you can still create the automation, but it will be titled "New Automation" with no description.

2. To edit the name, hover over it, click the link, and the dialog will re-open for you to edit.

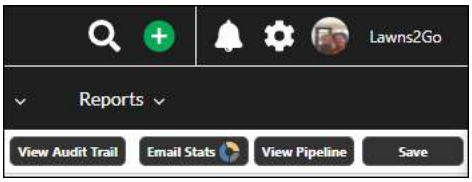


Automation Edit Screen: Overview

The **Automations Edit** screen has two parts: the left column displays Events, Templates, and other items that can be added to an automation and the main portion of the screen contains the various sequences that make up an automation..



When you initially create an automation, you will see only the **Save** button in the top right corner. Once that automation has been saved, however, quick links to **Email Stats** and **View Pipeline** buttons display. If you have emails that need approval, that button, too, will appear.



Email Stats

Clicking this button opens a dialog from the Email Activity logs showing the breakdown for all emails sent during this automation.

View Pipeline

This takes you to the **Sequence Pipeline** screen, which shows a breakdown of the automation for each client. Here, you can click any client for more information. See “Automation Sequence Pipeline” on page 34 for details.

Approve Emails

If your automation contains emails that are sent only after you confirm the message or message content, the **Approve Email** button appears on the **Edit** screen header showing the number of emails awaiting approval.

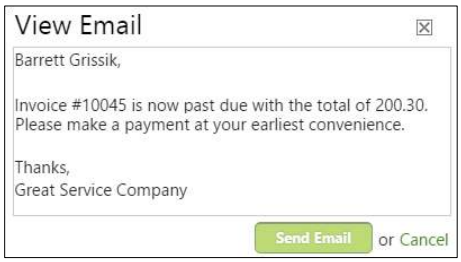
You can find out if you have emails to approve by including your name or role in the email event settings for Approve Emails. This notifies you when an email needs approval; you can then open the automation to do so.

1. Click the alert to see the **Approve Emails** screen.

   The **Approve Emails** screen shows the client's name, the email address, subject of the email, and the date the email was created. Icons on the right display the status of the email:

   - Click a client's name to open that client's account.
   - View the body of the email that will be sent – pending approval – by clicking the email icon.

2. Click **Send Email** to approve and send it.



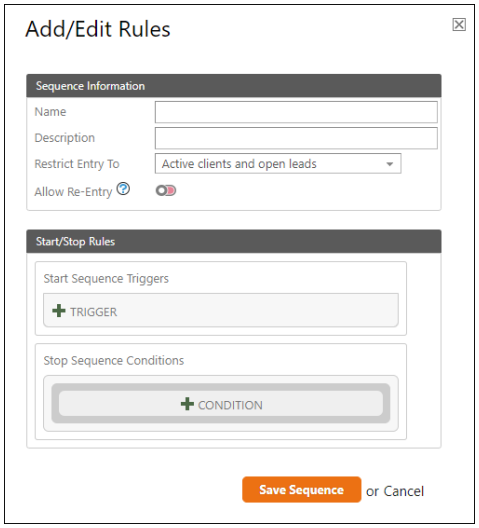
3. To approve several emails at once, select their check boxes and do a bulk approval using the **Actions** button.

Add a Sequence to an Automation

All automations are composed of one or more *sequences*. Sequences are series of events that occur based on rules that you create. Rules are a collection of triggers and conditions that begin and end a sequence. Conditions create triggers, and triggers set the rules in motion.

1. From the **Edit Automation** screen, click **Add Sequence** to add a new sequence:

2. This opens the **Add/Edit Rules** overlay.



This overlay has two parts. The top half contains the sequence's information, and the bottom half has the rules that determine when a trigger is activated.

Sequence Information

Name and Description

The name of each sequence appears for each client in the Pipeline, so try to keep this brief. The description can mirror the name or be more detailed. Both appear on the Automations main screen.

Restrict Entry To

In Automations, the term *entry* means becoming a part of the automation. You may have several Leads who meet the conditions to start (or enter) a sequence, but if this automation is strictly for

clients, you might not want a lead to get the emails or follow-up forms, etc., that the automation creates. Choose here from a dropdown list of statuses of your clients and leads: active, former, open, and closed.

Allow Re-Entry

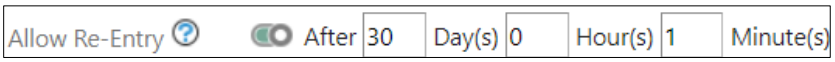
If you want to set the number of days between a client being placed into an automation again, click the slider and enter a number.

For example, you may want to restrict an automation to only one time for each client or lead. If you create an automation that occurs only the first time a visit is successfully completed for a new client, you might not want that client, upon having a second visit completed, to go through the process again. Or you may have specific emails or forms that you send, such as discounts or offers, that you don't want to repeat.

Other automations may have a quarterly cycle. Some might be weekly check-ins.

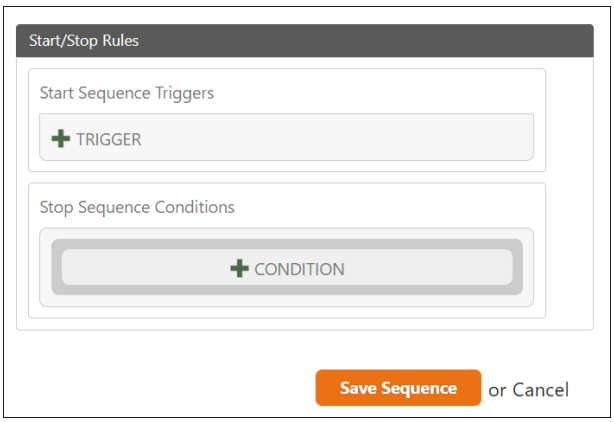
Allow Re-Entry Default Setting

To help prevent unintentional infinite loops from being created in an automation, SA has increased the default setting for **Allow Re-Entry** to one day. You can still adjust the setting to as low as one minute.



Start/Stop Rules for a Sequence

You can start and stop a sequence on the bottom half of the **Add/Edit Rules** overlay:



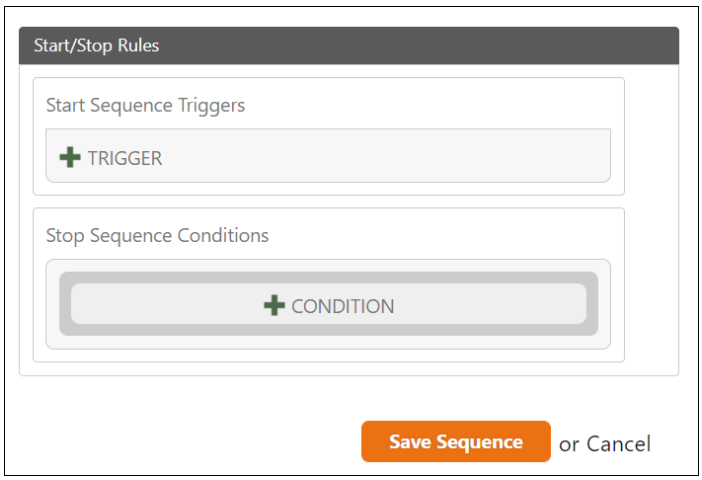
Start a Sequence

A *trigger* is required to start any sequence. The list of triggers includes events that occur during normal operations, like completing a visit or creating an account. You may have one or multiple triggers that start any sequence.

1. Click **+ TRIGGER** and select a Trigger Type from the dropdown list.

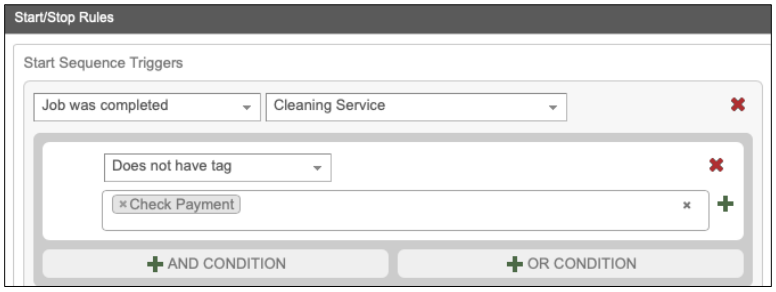
2. Another dropdown based on that trigger appears.

   For instance, if a visit being completed triggers a sequence, the system needs to know which services you want to include. All of them? Only a few? Select the options you need.



3. Do you want to place any conditions on this trigger? Click the **+ CONDITION** button to expand the dialog to include a dropdown list of conditions, based on the triggers that you are using. Maybe your sequence will start when specific services are completed, but only if those clients have or do not have a certain tag.

4. At this point, you can add another condition to further restrict who gets into a sequence, or you can add an "or" condition to include more clients or circumstances.

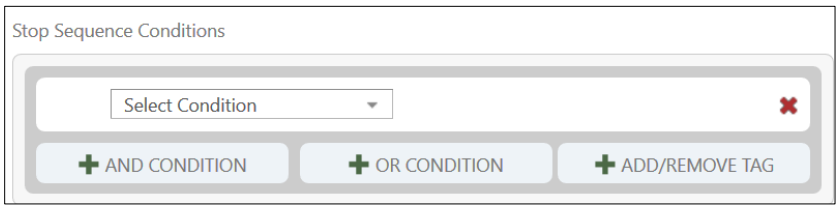


Stop a Sequence

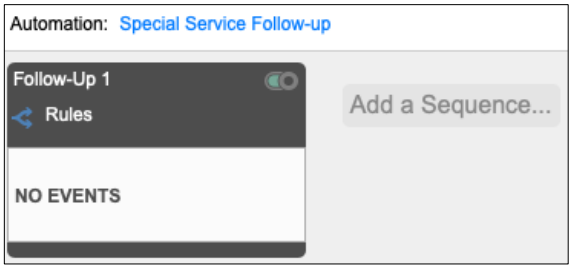
5. After you finish customizing the start triggers, you have the option of determining what conditions will stop the sequence. You are not required to add stop conditions.

   If you include stop conditions, remember that a client who meets this criterion will not cause a real-time stop or immediate update to the automation. **Meeting this criterion will simply stop the automation from running the next event in the process for affected clients.**

   Stop conditions also give you the option of setting or removing one or more tags when the stop condition is met. Just remember that this won't work for manually stopped automations.



6. When you've finished setting up the sequence, click **Save Sequence**. It appears in the main part of the **Edit** screen.



Sequence

Sequences have two parts: **header** and **body**. The header contains the title of the sequence.

1. Click the **Rules** or **name** to open the initial **Add/Edit Rules** dialog.
2. On the top right, use the slider to turn the sequence on or off: green for on, and rose for off.
3. The bottom of the sequence will expand to display all the events from the left panel, from which you can drag and drop.

Automations Edit Screen

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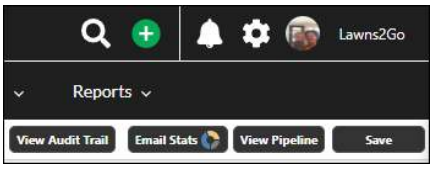
When you initially create an automation, you will see only the **Save** button in the top right corner. Once that automation has been saved, however, quick links to **Email Stats** and **View Pipeline** buttons display. If you have emails that need approval, that button, too, will appear.



Email Stats

Clicking this button opens a dialog from the Email Activity logs showing the breakdown for all emails sent during this automation.

View Pipeline

This takes you to the Sequence Pipeline screen, which shows a breakdown of the automation for each client. Here, you can click any client for more information. See the Automation Sequence Pipeline section below for details.

Approve Emails

If your automation contains emails that are sent only after you confirm the message or message content, the Approve Email button appears on the Edit screen header showing the number of emails awaiting approval.

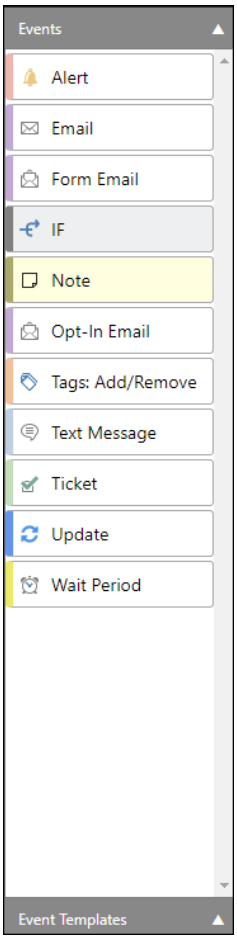
You can find out if you have emails to approve by including your name or role in the email event settings for Approve Emails. This notifies you when an email needs approval; you can then open the automation to do so.

1. Click the alert to see the **Approve Emails** screen. This screen shows the client's name, the email address, subject of the email, and the date the email was created. Icons on the right display the status of the email.

2. Click **Send Email** to approve and send it.

3. To approve several emails at once, select their check boxes and do a bulk approval using the Actions button.

Automation Edit Screen - Events Panel

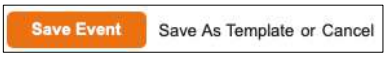


The left portion of the **Edit** screen shows events in the top half and templates in the bottom half. You can show or hide either half by clicking the arrow at the right of the section header. By default, this panel shows events and hides templates.

To expand the view, click the triangle at the bottom of the panel in the gray Event Templates header, or the top triangle in the Events header.

Save Events as Templates

Click **Save Event** to save an event solely for the sequence in the automation you are creating, or click **Save As Template** to save the event as a template.



Any event that you want to save as a template is stored under **Event Templates** in the left panel.

You can quickly drag and drop events that you use repeatedly across other automations.

You can edit these templates for each automation, then save them into their individual automation sequences, while keeping the original template for use later.

Events

Events are the main processes of your automations. Drag and drop them into the sequence body and edit them to create processes. All events have an icon and are color-coded with a stripe down the left side to help distinguish them in the sequences.

Note: If you assign an event to a CSR or Sales Person and neither is attached to that client or visit, the event will default to the specific resource or, finally, to the role that you have chosen. The system will not allow you to save an event without assigning it to someone.

Alert

Alert creates notifications for employees.

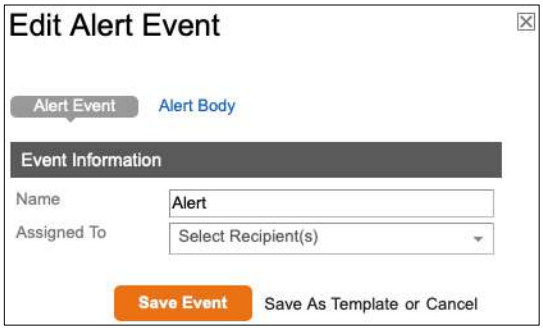
The dialog contains two tabs. You will not be allowed to save this event without entering information on both tabs.

Alert Event Tab

"Name" is the name of the alert.

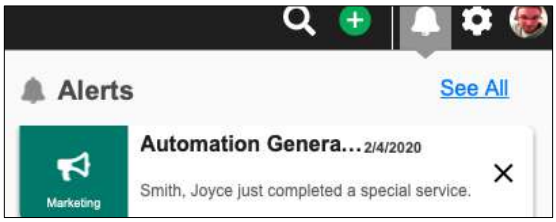
"Assigned to" creates an alert for the person or role you select in the dropdown list.

For roles in your company, use this for alerts to a group, such as your management team.



Alert Body

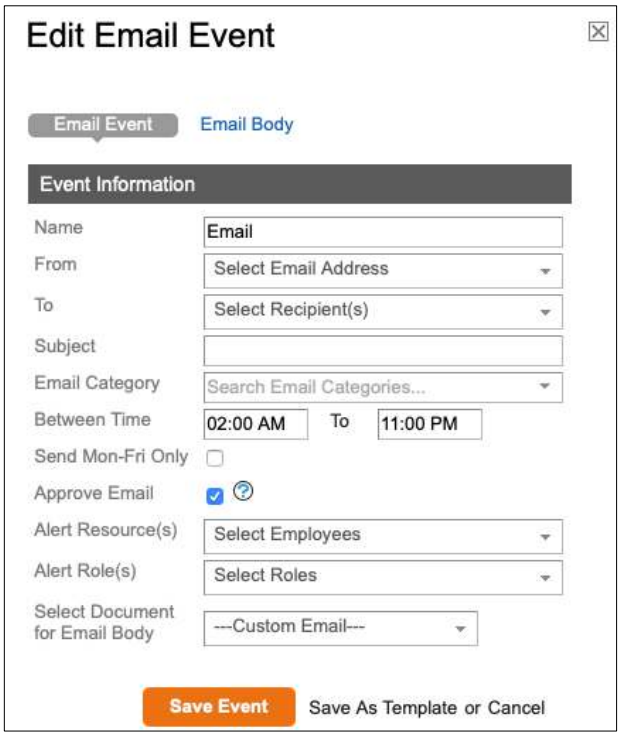
The **Alert Body** tab displays a text area where you can type the alert message with personalization fields available to use for a custom message. The example shows an Alert using the [clientname] field.



Email

The Email event can be used to send emails to resources and clients.

Email Event Tab



- **Name**: the name of the email describes its purpose. The email subject line appears on the Email Body tab.
- **From**: select an email address from the dropdown list. This lets you specify what you want to appear in the "From" field that the client sees. The email will go to clients included on the

automation, along with any resource you select in the assign options; and the email address will correspond to your [branchname] instead of [usermail].

- **To**: select recipient(s) from the dropdown list. This sends the email to the clients included on the automation along with any resource you select in the assign options.
- **Email Category**: will need to be identified to allow clients the option to subscribe or unsubscribe from receiving future emails.
- **Between Time**: defaults to the start and end times for your company but can be edited to your preference. Setting the delivery hours here restricts when an email is sent.
- **Send Mon-Fri Only**: allows the email to be sent only on weekdays. This is important when you set up wait periods for events.

The various assign options remain the same for each event:

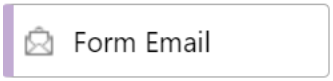
- **Approve Email**: places the email in a waiting status until you approve the email on the Approve Emails page. If you have emails awaiting approval, you will see the Approve Emails button on the Edit screen.
- **Alert Resource(s)**: assigns the event to one or more resources once conditions are met. You need to assign a resource if your company does not have a CSR or Sales Person.
- **Alert Role(s)**: assigns any role from the dropdown list to notify of the event.

Email Body Tab

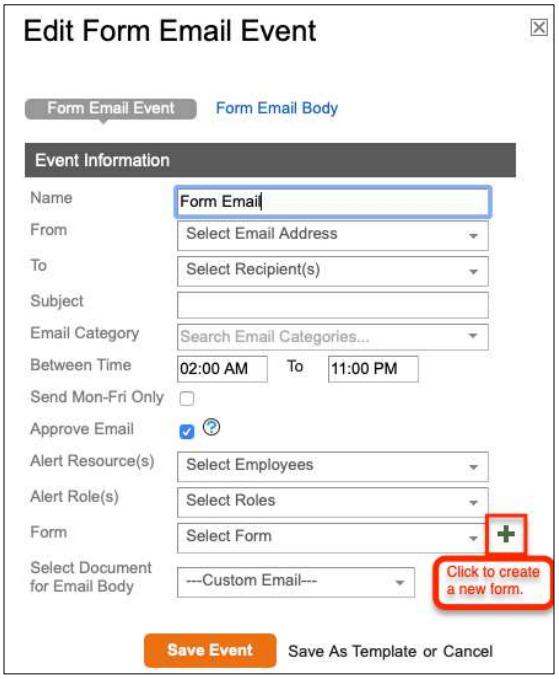
The “Email Body” tab displays the subject input and the email body to be edited.

Personalization fields are available for customizing; you can target whether clicking those fields will put the information into the Subject line or the Body of the email.

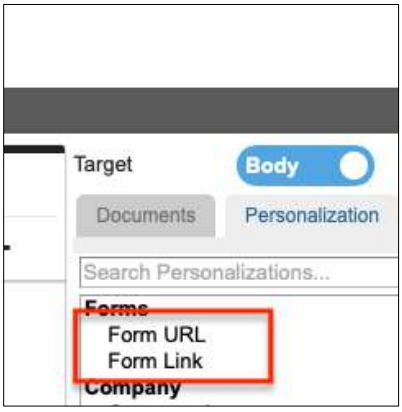
Form Email



The **Form Email** event works the same way as the Email event, but you can also add a form to the email from the **Form Email Event** tab.



If your **Form** dropdown list doesn't contain a form you want to use, you can click the "**+**" icon to open the Forms Builder overlay and create an ad-hoc form without leaving the Automation Edit screen.



The "Personalization" tab on the **Form Email Body** tab contains an additional Forms section. The forms section has personalization fields for Form Link and Form URL that you can insert into the email.

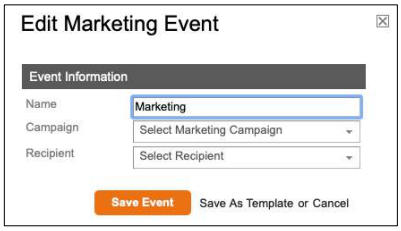
If/Else Logic

This more advanced event is used to add decision logic within an automation sequence. Use this event to create conditions that allow the event to proceed or keep it from proceeding, and to determine what happens within this piece of the sequence. This is explained in “Build Decision Logic into an Automation” on page 28.

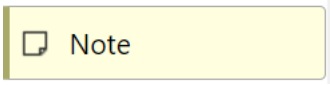
Marketing

This type of event works through **SendJim**, a third-party service that requires a subscription. Use this event to show your appreciation to clients and market to new leads. You can use it to send email and physical mail such as postcards, letters, greetings cards, and gifts.

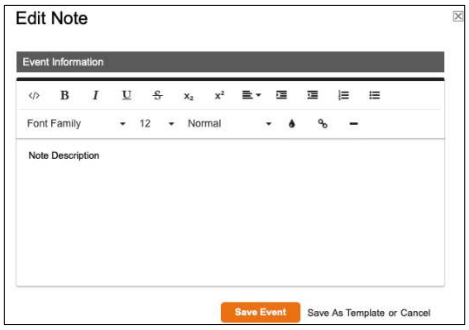
See “Set Up SendJim” on page 40 for information on setup and integration with this service.



Note



Notes are internal, an opportunity for you to make any comments in the automation’s sequence. This note appears only on the **Edit** screen.



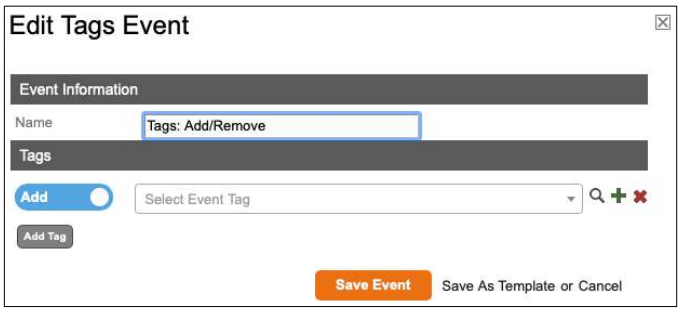
Opt-In Email

Use this event to send a specific Opt-In email to clients in order to get approval for future marketing notifications from your company. You also can include *Opt-In* or *Opt-Out* links that let clients subscribe to different email categories, or unsubscribe from them. For details, see "Customize an Opt-In/Opt-Out Email." on page 23.

Tags

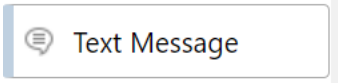
Although you can add or remove tags within specific events, a Tag as an *event* is sequence-based. Aside from general information that a tag supplies in a client's account, an event tag might be connected to a previous event completing, or the plan for a future event. You can use it to mark a client as having entered and completed certain portions of an automation sequence.

In the **Edit Tags Event** dialog, you can add or remove one or several tags and create tags from a new dialog without leaving the sequence you're editing.



Note: When creating tags, it's important to save them with a format of ***### - Tag Name***. Doing this allows for easier grouping of assets including automations.

Text Message



Use this event to send a text message to clients or resources. This overlay is set up to mirror the **email event**, except that it will send to cell phones only, so it has fewer body options in the **Text Body** tab.

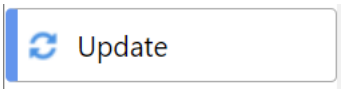
Note: You must first **subscribe** to Two Way Texting before you can use it in an automation. See "Two-Way Texting with Automations" on page 36 for more information.

Ticket

A **Ticket** event will create a ***new Ticket*** that is one of three types:

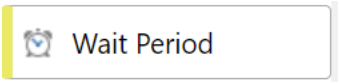
- **Note -** This is used for anything that isn't a phone call, such as internal notes.
- **Call –** This is used to create an assigned call task.
- **Calendar Event** – This is an event with a set date and time. The automation's "Start in" and "End in" days will set the Start and End dates on the Calendar Event

Update



Use the **Update** event to update an account's assigned Sales Person or CSR, or update a custom field with a predefined value.

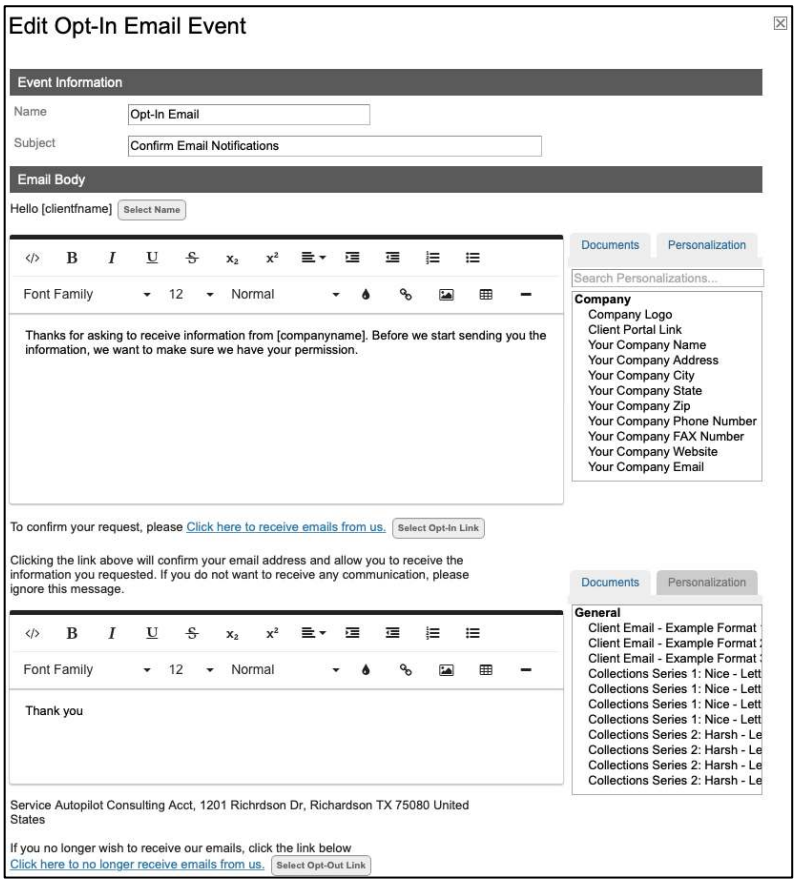
Wait Period



Use a **Wait Period** to delay the next event in the sequence based on criteria you specify. For more information, see "Wait Period Specifications" on page 30.

Customize an Opt-In/Opt-Out Email

The opt-in email overlay displays the text of the entire email, which contains a mixture of standardized and customizable areas. A sample email body is shown below, including the sections or paragraphs that you can customize.

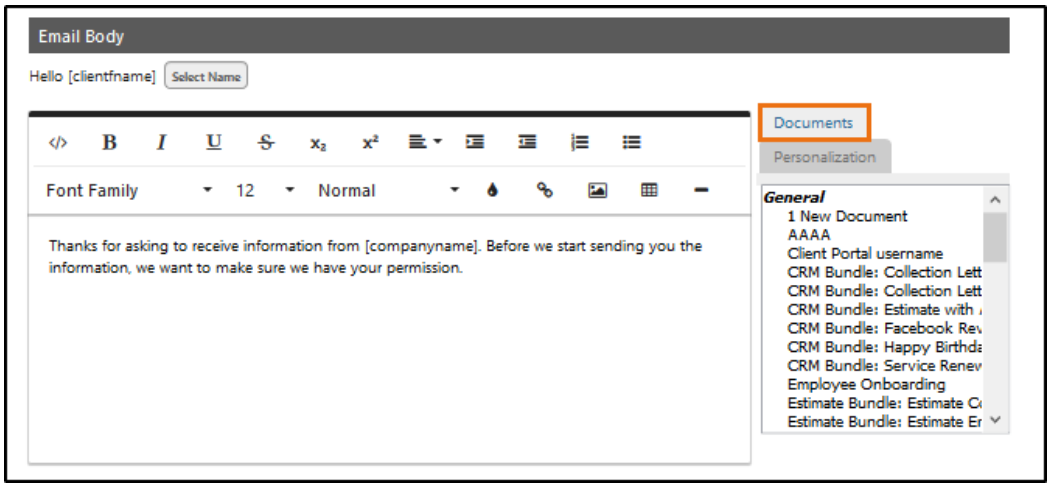


1. The Email always begins with some version of the client's name, so select one from three personalization fields.

2. Click the **Select Name** button to choose the name.

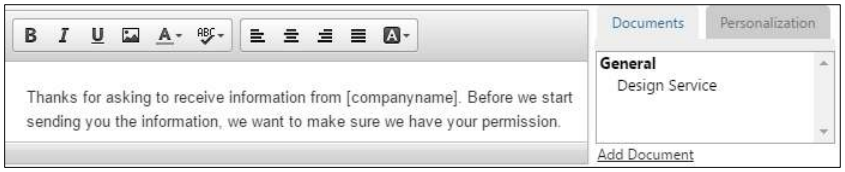
3. The email below contains standard text for the opening paragraph. You can edit this to your needs, as you would any other email in the system.

   If you have any email templates, they will appear on the “Documents” tab.



4. You can select from a full range of replacement fields on the “Personalization” tab.

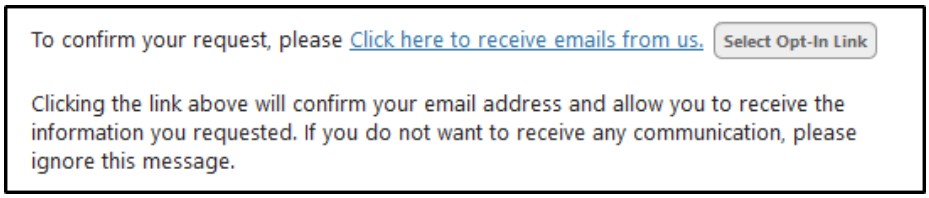
5. If you’d like to add a document at the same time you create the opt-in email, click Add Document. This opens an overlay where you can create the email without leaving the automation you’re building.



Add an Opt-In Link

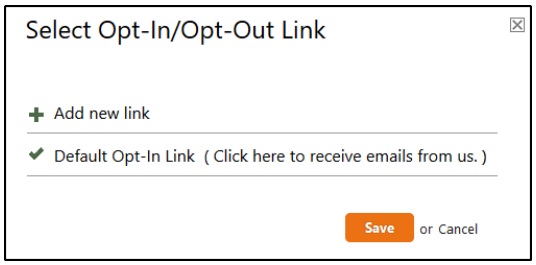
Below the opening paragraph, you’ll see some standardized text as the opt-in link. To personalize this, follow these steps.

1. Click the **Select Opt-in Link** button.

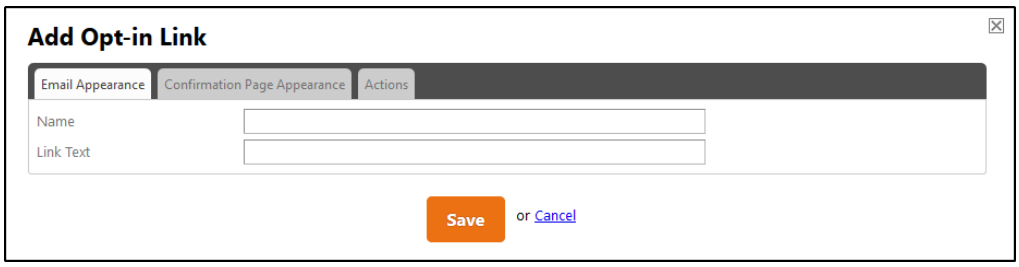


This opens a dialog where you can add a new link or select the default option:

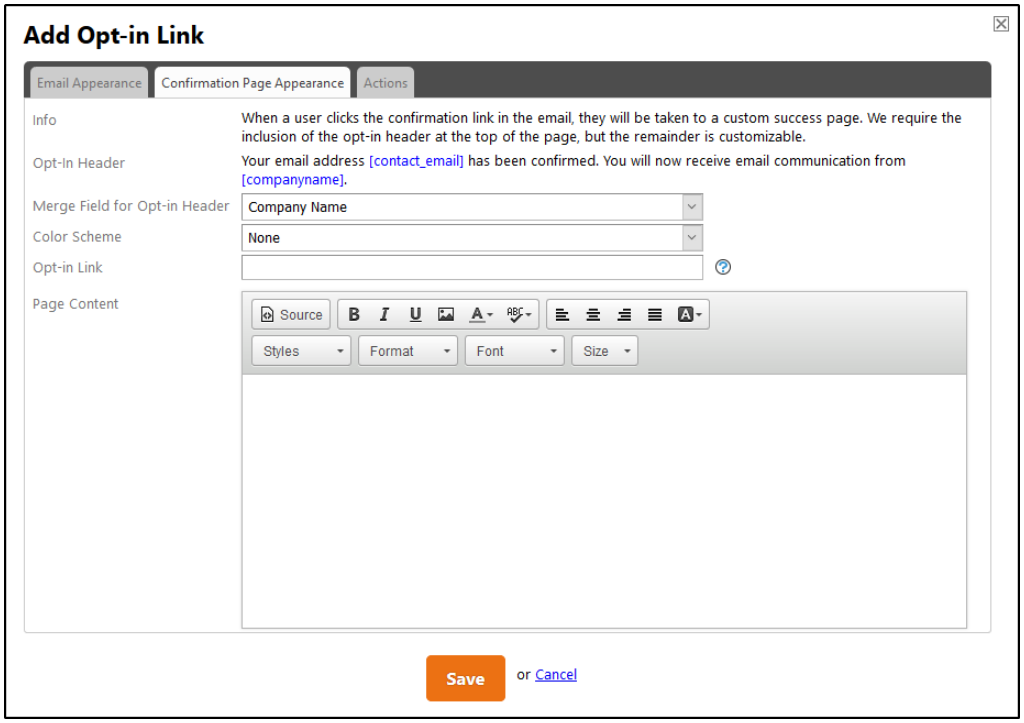
2. Click **+ Add new link** to open an overlay.



3. Optionally, add a name for the link to distinguish one opt-in link from another:

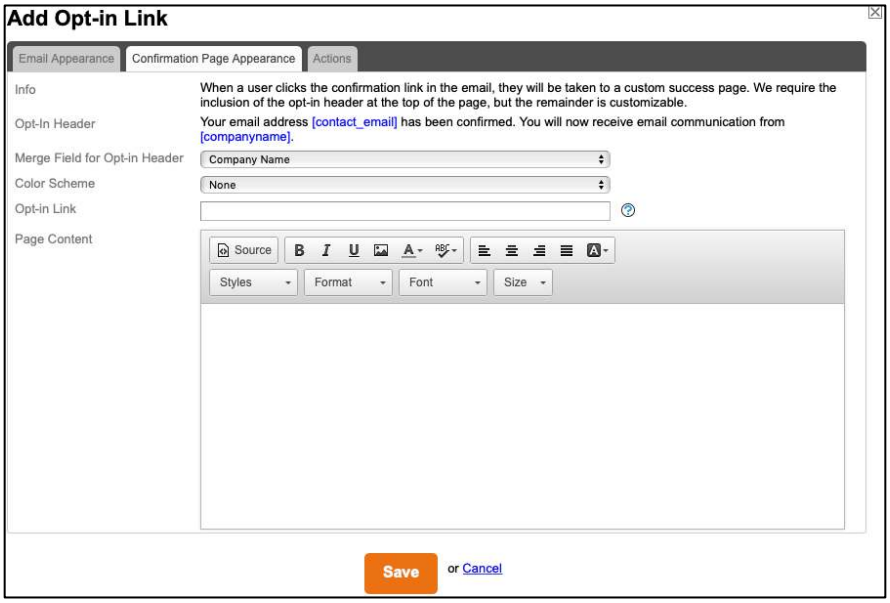


The "Link Text" field is what clients will see and click in the email.



Confirmation Page Appearance

The "Confirmation Page Appearance" tab contains some information that you can control and some that is standard.



1. The **Opt-In Header** field is standard, but you can choose whether your Company Name or Display Name goes into that header, and your color scheme.

2. If you'd like to redirect the page to a specific web page after clients have confirmed their choice, enter the URL in the **Opt-in Link** field.

3. To place some of your own text on this page, enter it into the **Page Content** field. It will appear on the confirmation page below the header.

Actions

Finally, when a client has opted in to emails, you can set or remove a tag.

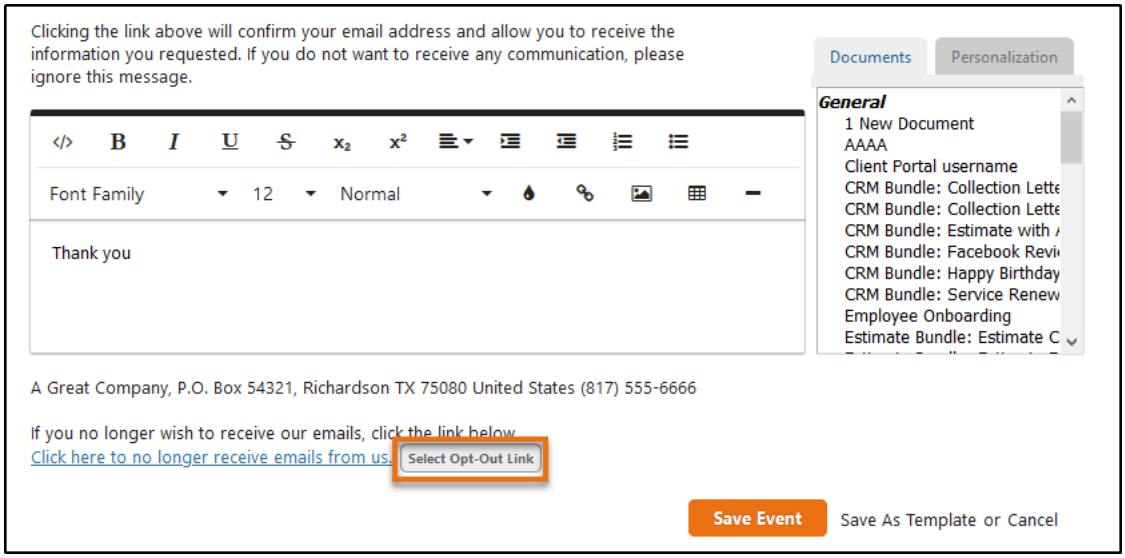
1. To add a new tag, you can do so without leaving the automation by clicking the "**+**" icon.

2. Click **Save** to return to the main email document.
   Following the Opt-In link and its text, the closing paragraph/comments of the Opt-In email appear in another editable box, which you can optionally customize.

Opt-Out Link

At the bottom of the email, after your company contact information, opt-out information for clients is required. You can customize this:

1. Click the **Select Opt-Out Link** button.

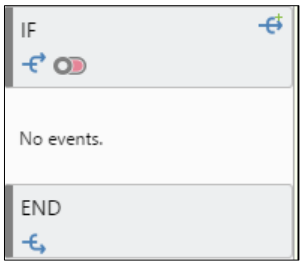


   The layout for opting out of emails is like opting in, except that the Confirmation page is much simpler. It contains only a text area for you to include an opt-out message.

2. Type in your message and click **Save**.

   Remember that you can also save the Opt-In Email as a template.

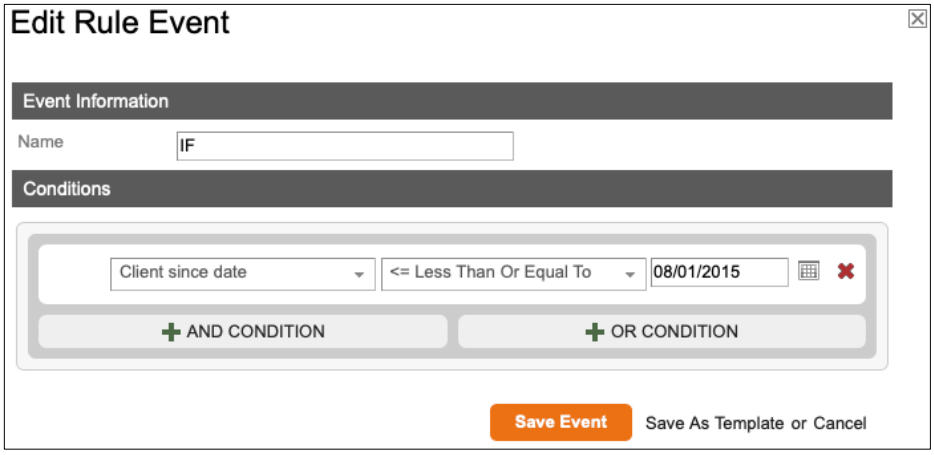
Build Decision Logic into an Automation



Not all automations need to run chronologically. You can build *decision logic* into any sequence of events with IF and THEN events: IF "this thing" (which you set in the edit dialog), THEN " this other thing," which is one or more other events that you drag under the IF clause.

Adding an IF event to a sequence automatically places an END event after it, since you are essentially adding a mini-sequence within your larger one.

1. Click the END event to edit its name.
2. Click the IF event to see the **Edit** dialog screen.



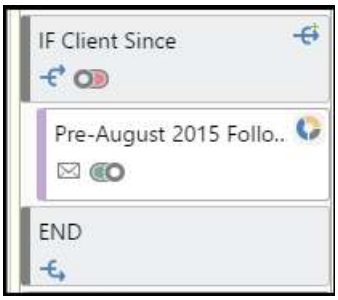
You can add more than one condition. It could be an AND condition – limiting clients to those who meet both conditions to go through this part of the sequence. It might be an OR condition, which is broader. You also can place both kinds of conditions on an IF sub-sequence.

Note: If a client meets none of the conditions, that client will simply skip the IF block.

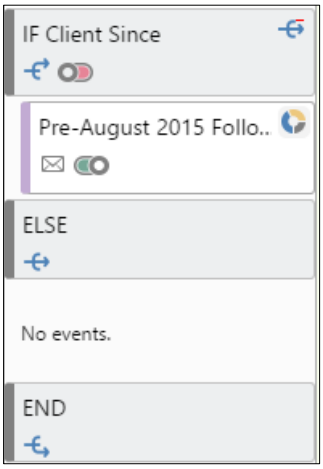
For example, as part of your automation for a specific service, you want to send an email to clients who have completed that service. But the email needs to be different for clients who have been with you for a long time. You might want to offer them specific new sub-services that newer clients don't receive, or ask for feedback based on their long-term relationship with your company.

In the example, if your client has been with you since before August 1, 2015, you are going to send one email.

Save the event and drag an Email event under the IF event. You'll see that it is indented slightly.

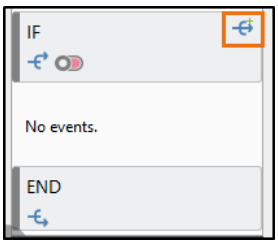


This tells you that it is part of the IF event and, now, any client who is in the sequence and has been with you since August 1, 2015 will receive that email.



If you want your **post-August 1st, 2015 clients** to receive a different email instead of just skipping to the next part of the sequence, you can create an "ELSE" event within the IF portion of the sequence.

Branching

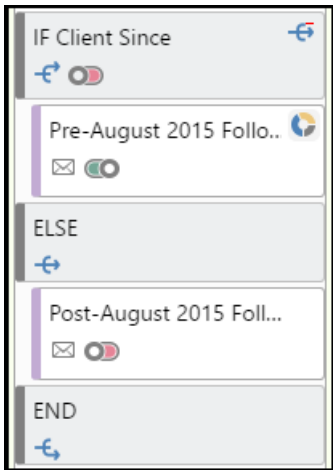


A *branching* icon appears at the top right of the IF event. Click it to make an ELSE event appear in the sequence.

This event is like the IF event, but it is taken into consideration only when the IF conditions fail, and you want something more than to have the client just move out of the IF sub-sequence and continue in the larger sequence.

The edit dialog mirrors the IF dialog.

If you have special conditions that need to be met within the ELSE event, you'll add them as you did with the IF conditions.



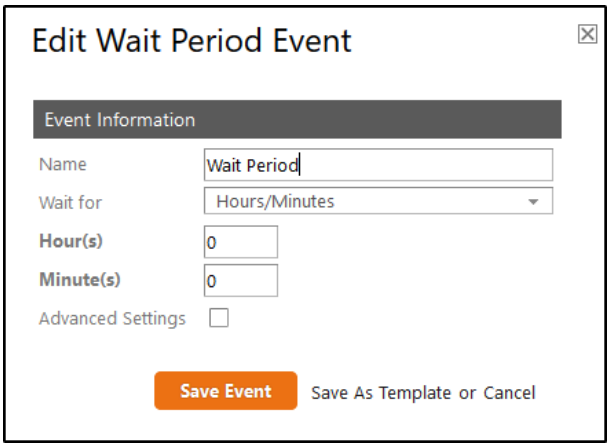
In the example, we want all our post-August 1st, 2015 clients to get this email. But if we want only those who were newer than August 1st, 2015 **and** haven't already signed up for a certain package, we could add that condition in the ELSE dialog.

For our example, we will send a different email to clients who came to the company after August 1st, 2015 without excluding anyone or making any further condition. So, we would drag the Email event into the ELSE sub-category and customize that email.

Wait Period Specifications

At its most basic, a wait period simply requires that a certain number of days pass before the next part of a sequence begins.

Event Information



Name

If you want to distinguish various wait periods, name them.

Wait For

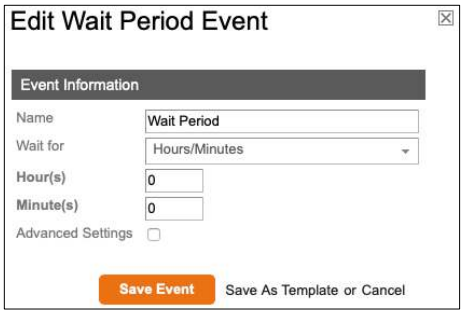
The dropdown list in this field lets you choose from several options:

No Delay

Although it seems counter-intuitive to create a wait period and then specify that you want no delay, you may, in the advanced settings, decide that the next event will always start on the weekend following the completion of the previous event. No delay, then, would mean that whether an event completes on a Monday or a Friday, the next event would begin no sooner than the next Saturday. Therefore, your wait period might be five days, or it might be only one day.

Hours and Minutes

If you need a very specific wait period, you can specify hours and minutes.



A scenario for this might be an automation for a chemical application. At the completion of the visit, a wait period of X hours and Y minutes must pass before it's safe for your client to play on the lawn or swim in the pool. The sequence begins the wait period as soon as a field technician completes the service, then it sends your client a text message when it's safe to go swimming or walk on the grass.

Days

This sets a basic wait period of X days.

Remember that each event works based on its own rules. If your wait period is one day and ends on a Saturday, but your next event contains a rule that requires it to begin on a weekday ("Send Mon-Fri Only"), the event will begin Monday, the first available weekday after the wait period has expired.

Days After

This is similar to the "Days Before" option; it lets you specify the number of days after the "Client Since," "Visit Date," or custom field date for an event to process. When the event processes, the Wait Period schedules the days you specify after the desired date (for example, five days after "Client Since" date).

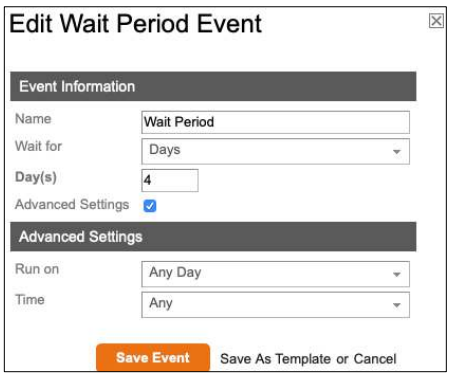
Days Before

This event is helpful for setting an event to take place a day or more before a *Client Since Date*.

Advanced Settings

All wait periods run on any day and at any time by default. There is no need to use advanced settings if that meets your needs.

If you want to further customize the wait period by specifying dates or times, click **Advanced Settings** to see more options.



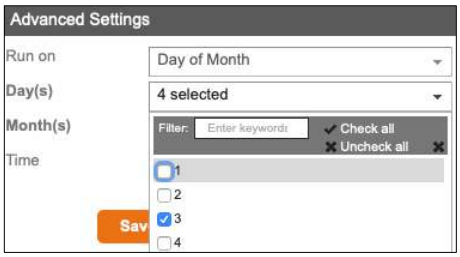
Advanced settings limit the time of year during which a wait period will initiate. A basic wait period can initiate year-round during any of your business hours. One with advanced settings will, based on those settings, move clients directly onto the next event during certain days, months, or times.

Run On

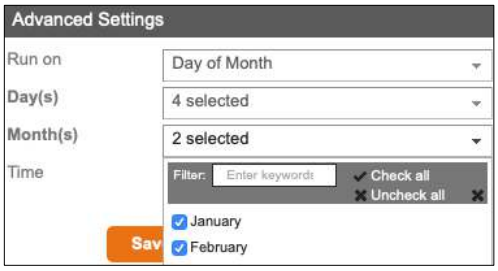
Use this to designate specific days and/or times in which you want the waiting period to run.

Day of Month

This option lets you choose a day, or several days, from 1 to 31, or just the last day of the month, using check boxes. When you have made your selections, the **Day(s)** field will display the number of days you selected.



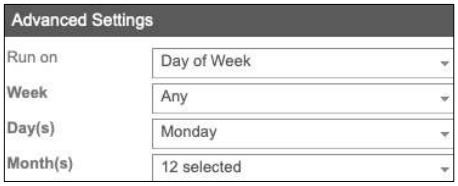
You also need to specify the months when the wait period is valid. As with the day, if you choose one month, the name of the month will display in the field; but if you choose two or more months, the number of months will display.



With this advanced setting, you could choose a wait period event that would initiate only in the first 15 days of the month, and only during the summer months. At any other time, a client would move directly to the next event without any waiting.

Day of Week

To further limit a wait period, you can choose specific days. This option gives you the same days and months options, and it also lets you specify a week in any month. You could, for example, create a wait period that runs only on the third Wednesday of any month.



When you select the **Day of Week** on which a Wait Period will occur, you now have the option of Any (the default setting) from the Week dropdown list. This gives you more control when setting up a Wait Period without restricting it to specific weeks of the month.

Time

For any day, week, or month option, you also can optionally specify a time. The default value is “Any.”

Weekday/Weekend

These options initiate a wait period only on weekdays or only on weekends, as you choose. There are no further options with these.

Specific

Specify a time at which to begin the wait period. The wait period will “wait” until the start time has passed; then, it will move onto the next event in the sequence.

Range

Enter both beginning and end times. This wait period will last only for the duration you specify.

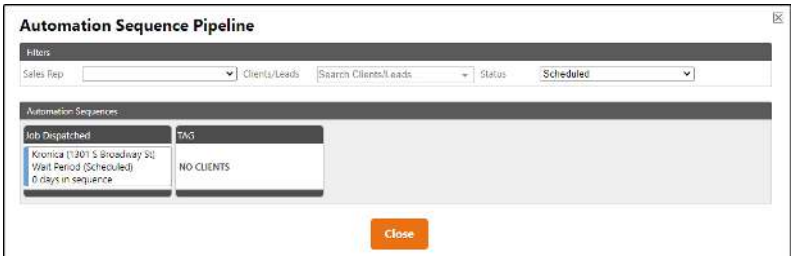
If an event triggers a wait period, but it’s outside of the times you’ve set, the wait period’s beginning will be delayed a day until it is within the range of the hours you’ve set.

Example: Your wait period is set to run on any day, for three days, and will process between 6:00 a.m. and 4:00 p.m. Someone completes a visit, which would normally trigger the wait period, but the visit is completed at 4:30 p.m. The wait period will begin at 6:00 a.m. the next morning.

Automation Sequence Pipeline

The pipeline overlay displays details of the automation you've chosen.

From the **Automation Edit** screen, click **View Pipeline**. This opens the **Automation Sequence Pipeline** overlay:



You may have only a few clients in an automation, but if you have more, you can use the filters at the top to search by Sales Rep, Client, and the automation status of All, Scheduled, Completed, or Stopped. The default for this overlay is "Scheduled."

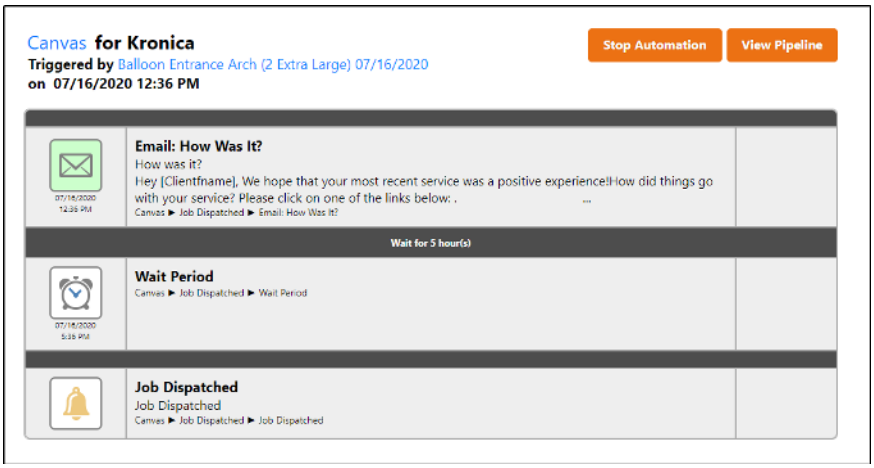
Check the Status of Each Client in an Automation

Each client in an automation is displayed with a color indicating their status in the sequence. **Scheduled** clients have a blue stripe, **Completed** clients have a green stripe, and clients whose automations have been **Stopped** have a pink stripe.

For each client, you'll see:

- The client's full name and as much of the property address as can fit.
- The most advanced event that has been reached in the sequence, with the status in parentheses.
- The length of time the client has been in that sequence.

Click a client to get details of that client's status within the larger scope of the sequence.

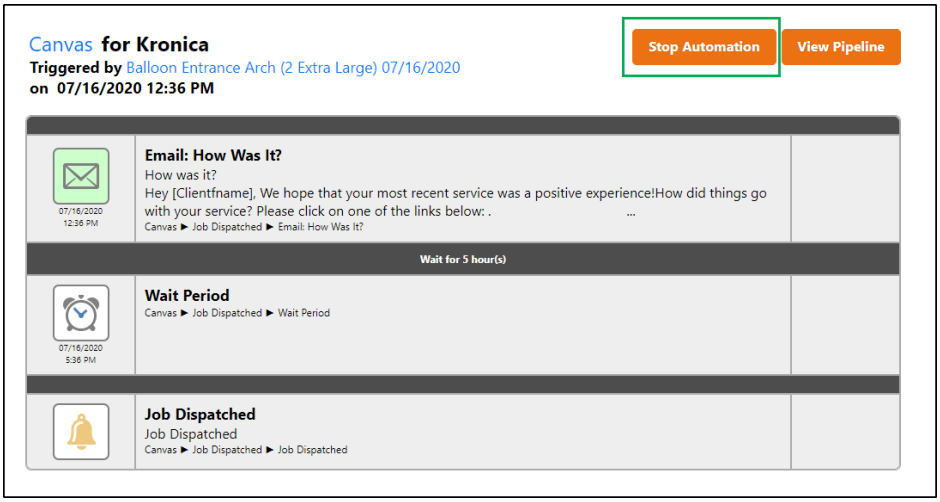


If the icons are pink, it means those events have been stopped. Completed events appear in green, and scheduled events appear in white. Failed events appear in yellow.

Stop an Automation for a Client

If a client is within an automation and has a status of “Scheduled,” this screen offers additional options for you.

Here, you can click to stop an automation.



Stopping a sequence for a client removes that client from the automation for any scheduled events.

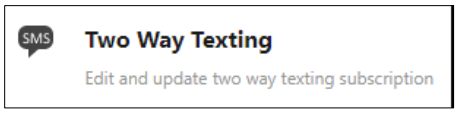
Two-Way Texting with Automations

Two-way Texting is a feature available to all Pro Plus Members who have Automations enabled. This is a feature that can be added to any sequence within an Automation. Before you can use this feature, you need to choose a subscription.

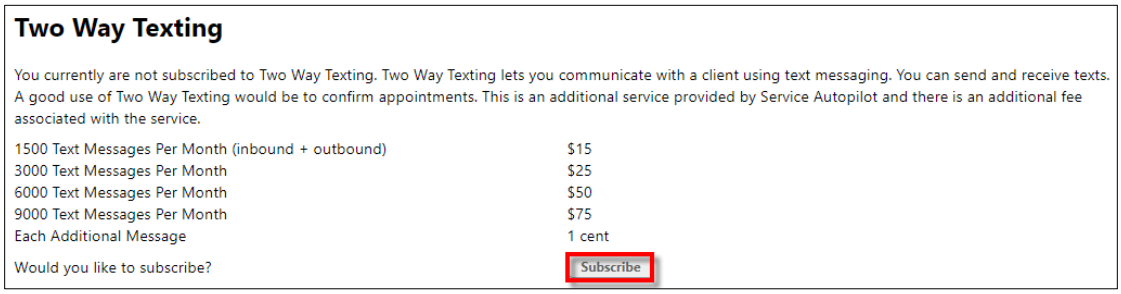
Note: After subscribing to and selecting a phone number, you won't be able to transfer it to another phone service provider. This is because SA uses Twilio as the only third-party service provider for text message integration.

Subscribe to Two-Way Texting

1. Go to: **Settings > CRM**
2. Click **Two-Way Texting**



3. Click **Subscribe**



Note: Clicking **Subscribe** will not finalize your request, but it will display the **Purchase Phone Number** overlay where you choose a phone number and confirm the purchase.

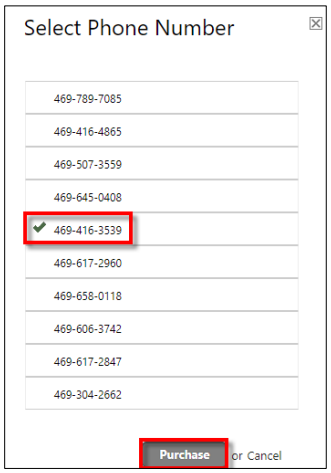
4. The **Purchase Phone Number** overlay appears. Follow these steps to *purchase a phone number*:
   a. Select **Subscription Level** from the dropdown list.
   b. Type in: **Area Code** (You may need to select an area code that is closer to a bigger metropolitan area).
   c. Choose an option for the first three numbers of your phone number:

      Any Prefix: to let the system assign your number

      Specify a Prefix: enter a three-digit number
   d. Click **Purchase.**

Specifying a prefix does not guarantee you will get it. It's all based on availability, and if there are no matches for your specifications, you will get an error message stating that "An error has occurred: There are no available phone numbers for this area code/prefix. Please select a different area code/prefix and try again."

5. Select a **Phone Number**, then click **Purchase**

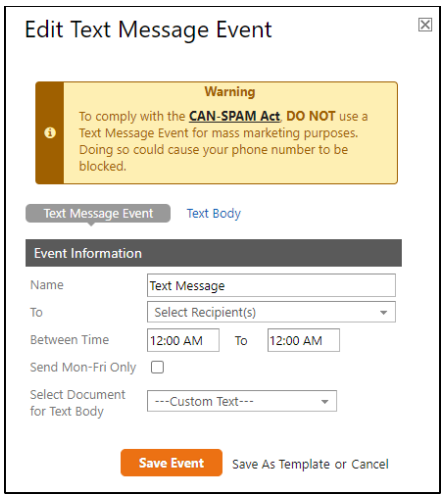


Set Up Two-Way Texting Within an Automation

Once you have Two-Way Texting enabled, you can create events within an Automation sequence to help you with automated processes. You can use this feature to confirm appointments for upcoming services, notifications of service completion, etc.

This section shows you the basics of how to create a *Text Message* event within an Automation.

1. Go to: **Marketing > Automations**
2. Select an existing automation or click **Add Automation**
3. From the **Automation Edit** screen, drag and drop a **Text Message Event** onto an existing sequence, or a new one.
4. Click the Text Message event tile to bring up the **Edit Text Message Event** overlay.



5. Edit the Event Information:

   Name - Enter the Name of event.

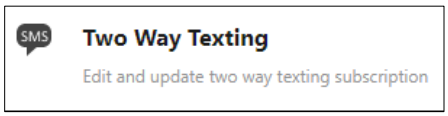
   To - Select Recipient(s) from the dropdown list.

   Between Time – Fill in the times.

   Send Mon-Fri Only – check or uncheck this.
6. Click the "Text Body" tab to type in the **Text Body**; include personalization fields if necessary.
7. Click **Save Event**.

Cancel Text Messaging Subscription

1. Go to: **Settings > CRM**
2. Click **Two-Way Texting**



3. Click **Cancel Text Messaging Subscription**

4. A confirmation message appears. Click **OK** to confirm the cancellation.

Note: After subscribing to and selecting a phone number, you won't be able to transfer it to another phone service provider. This is because SA uses Twilio as the only third-party service provider for text message integration.

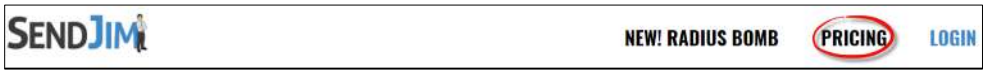
Set Up SendJim

This section covers the steps required to initiate Automation Marketing events through an integration with a SendJim subscription (this service is **independent** of Service Autopilot).

Subscribe to SendJim

Follow these steps to subscribe to SendJim:

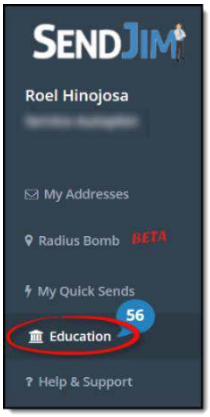
1. Go to SendJim's website **www.SENDJIM.io** and click **PRICING**.



2. Review service pricing and click **SIGN UP**.

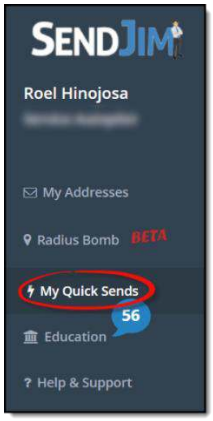
3. Fill in the following:
   - **Contact Information**
   - **Billing Address**
   - **Check Out**
4. Click **Complete Order** to get instant access to SendJim.

Learn About SendJim



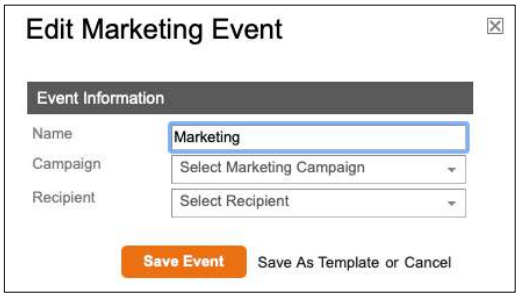
Before you start using SendJim, as part of an integration with Service Autopilot, you can educate yourself using resources on the SendJim Education screen.

1. After you've gotten used to SendJim, click **My Quick Sends** for shortcuts.



2. Click one of these options to add them to your **Quick Sends** menu.

3. After SA is **integrated** with SendJim, these options will appear in the **Quick Sends** dropdown list under **Edit Marketing Event**.

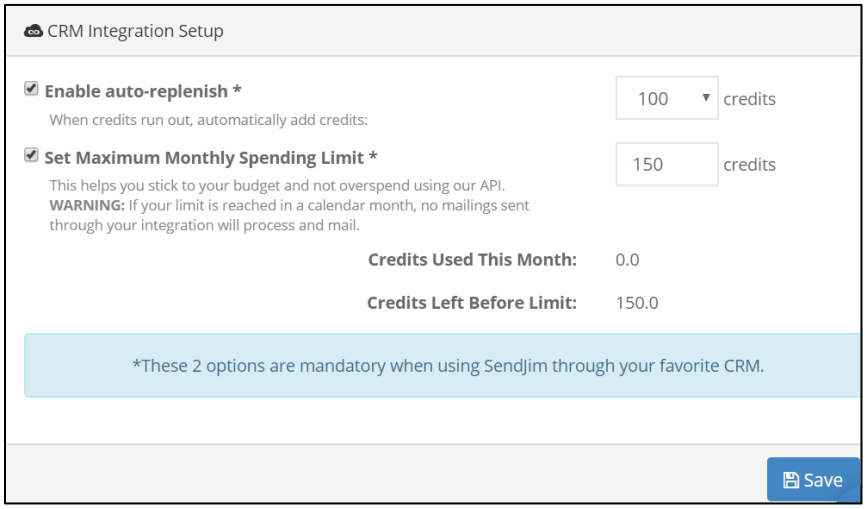


Create Billing Safeguards in SendJim

There are steps you can take to create billing safeguards in SendJim. You can choose to enable auto-replenish and set a maximum monthly spending limit. This controls how much you get charged each month on services.

Follow these steps for **CRM Integration Setup**:

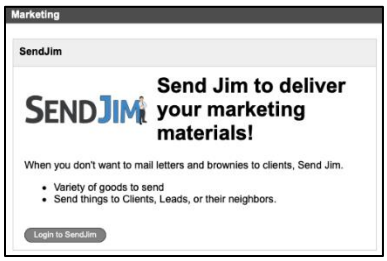
1. In your SendJim account, go to Company Profile > Billing & Membership > CRM Integration Setup
2. Click the **Enable auto-replenish** check box to enable the setting and choose how many credits will be added automatically. This is a required setting.
3. Click the **Set Maximum Monthly Spending Limit** check box to enable the setting and specify how many credits. This is a required setting.
4. Click **Save**.



Integrate SA with SendJim

Follow these steps to integrate your SA account with SendJim:

1. In your SA account, go to Settings > Company > Integrations
2. Click **Login to SendJim** under **Marketing**. The SendJim integration login screen displays.



3. Type in the User Name and Password from the initial SendJim signup.
4. Click the **Login** button to start the integration. A confirmation message appears.
5. Click **the Allow Access** button to complete the integration.

   You'll see this SendJim information after it's integrated with SA:

   - Status
   - Username
   - User
   - Date Created

Disconnect from SendJim

Follow these steps to disconnect your SA account from SendJim.

1. In your SA account, go to Settings > Company > Integrations
2. Click the Disconnect from SendJim button under Marketing

Note: Disconnecting SendJim from your SA account does not cancel your agreement with SendJim. SendJim is a third-party tool and SA is not responsible for any monthly fees incurred from its use.

Vocabulary

Branch	An IF event can be edited to have different outcomes based on different conditions, presented as ELSE conditions. This is called *branching*.
Condition	The specific set of circumstances that cause another action to take place: a trigger to perform a task, or a wait period to begin.
Event	An action that takes place only under certain circumstances set up in the sequence rules. Rules trigger events.
Pipeline	This is the timeline or progression chart of the automation, displaying which clients are at which point in the various sequences of an automation.
Rule	A collection of triggers and conditions that begin and end a sequence.
Sequence	A series of events that occurs based on rules you create.
Send Mon-Fri Only	Only use Monday through Friday Calendaring.
Trigger	A change in the system that sets a rule in motion. This could be a scheduling change – new, canceled, completed visit – or an accounting change – invoice generation, failed credit card charge – or any of several other modifications to a feature in the system.