



Service **Autopilot**[™]

AUTOMATIONS TRIGGERS & CONDITIONS

USER GUIDE

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“Alone we can do so little; together we can do so much.”
-- Helen Keller

About Automation Triggers

Triggers are part of the Sequence Start Rules; a Trigger is the action that starts a sequence.

Most triggers start the sequence immediately after an action has taken place, such as an **Estimate was won**, or **Ticket was created**. This means that as soon as the estimate is marked as Won or a Ticket is created, the client/lead enters the sequence.

Some Triggers do not start a sequence immediately. Instead, the sequence should be on at least one day before the sequence start date. Each morning, these Triggers run through a daily check searching for clients/leads who meet the Trigger.

For example, with the Trigger **Invoice past due**, clients who are past due will not enter the sequence on the day the sequence is turned on. Instead, clients who meet the Trigger will enter the sequence the next morning, after the Trigger completes its daily check.

These Triggers delay the sequence one day after the sequence is turned on:

- Contract is about to expire
- Credit Card is about to expire
- Run on client since date
- Run on custom field date
- Run on day of the week
- Run on time range
- Invoice past due
- Invoice was created (only when the invoice originates from a job)
- Ticket past due

Trigger Categories

CATEGORY	TRIGGER	EXPLANATION	NOTES
Client/Lead	Client cancelled	Runs when a client is cancelled	
	Client source updated	Runs when a client source is updated	
	Client was created	Runs when a client is created	
	Client was reactivated	Runs when a client is reactivated	
	Contract is about to expire	Checks for contracts expiring in [x] number of days	This trigger allows you to set [x] number of days before the contract expires. This trigger runs once a day in search of contracts that expire within the specified number of days.
	Credit card charge failed	Runs when a credit card charge fails	This trigger looks at failed charges attempted through the invoice list.
	Credit card is about to expire	Checks for cards expiring in [x] number of days	This trigger allows you to set [x] number of days before the card expires. This trigger runs once a day in search of cards that expire within the specified number of days.
	Credit card was updated	Runs when a credit card is updated	

CATEGORY	TRIGGER	EXPLANATION	NOTES
Client/Lead (cont.)	Has opted in for emails	Runs if the client/lead opted in for emails	Opt-in is set by sending an opt-in email.
	Lead cancelled	Runs when a lead is cancelled	
	Lead was converted to client	Runs when a lead is converted from a lead to a client	
	Lead was created	Runs when a lead is created	
Date	Run on client since date	Runs on the client since date	This trigger runs yearly (unless there is a stop condition).
	Run on custom field date	Runs on the selected custom field date	This custom field type must be set to <i>date</i> .
	Run on date	Runs on the specified date	This trigger runs yearly (unless there is a stop condition).
	Run on day of week	Runs on the specified day of the week	This trigger runs yearly (unless there is a stop condition).
	Run on time range	Runs on the specified time range	This trigger runs yearly (unless there is a stop condition).
Estimate	Estimate was created	Runs when an estimate is created	
	Estimate was lost	Runs when an estimate is marked as lost	

CATEGORY	TRIGGER	EXPLANATION	NOTES
Estimate (cont.)	Estimate was sent	Runs when an estimate is marked as sent	
	Estimate was won	Runs when an estimate is marked as won	
Form	Form was submitted	Runs when a form is submitted	Be sure to select a form through the trigger.
Invoice	Invoice past due	Checks for invoices that are past due	This trigger runs once a day in search of invoices that are past due.
	Invoice was created	Runs when an invoice is created	This trigger will pick up invoices created manually instantly, while invoices created from completed jobs will be picked up the following day.
	Invoice was paid	Runs when an invoice is marked as paid	
Job	Drive time started	Runs when a resource uses the mobile app to drive to a visit Note: The user <i>must</i> select the driving status to trigger an automation	This trigger only works with the Legacy app. Team app users will be included in the future.
	Job was cancelled	Runs when a job is cancelled	This trigger looks at master recurring jobs and master package jobs.
	Job was created	Runs when a job is created	This trigger looks at the master job.

CATEGORY	TRIGGER	EXPLANATION	NOTES
	Package was created	Runs when a package is created	This trigger looks at the client package.
Job (cont.)	Visit date changed	Runs when the visit date is changed	This trigger looks at the visit occurrence.
	Visit moved to waiting list	Runs when a visit is moved to the waiting list	This trigger looks at the visit occurrence.
	Visit was cancelled	Runs when a visit is cancelled	This trigger looks at the visit occurrence.
	Visit was completed	Runs when a visit is marked as completed	This trigger looks at the visit occurrence.
	Visit was dispatched	Runs when a visit is dispatched	This trigger looks at the visit occurrence.
	Visit was skipped	Runs when a visit is marked as skipped	This trigger looks at the visit occurrence.
Tag	Tag was added	Runs when the specified tag is added to a client/lead	
	Tag was removed	Runs when the specified tag is removed from a client/lead	
Ticket	Calendar Event Completed	Runs when a calendar event is completed	
	Calendar Event Created	Runs when a calendar event is created	

CATEGORY	TRIGGER	EXPLANATION	NOTES
Ticket (cont.)	Calendar Event Dispatched	Runs when a calendar event is dispatched	
	Calendar Event Skipped	Runs when a calendar event is skipped	
	Ticket past due	Runs when a ticket becomes past due	This trigger runs once a day in search of tickets that are past due.
	Ticket was closed	Runs when a ticket is marked as completed	
	Ticket was created	Runs when a ticket is created	
	Ticket was reopened	Runs when a ticket is reopened	

Tip: When using Merge Tags in your Automations, the Merge Tag type *must* match the Trigger type. For example, Invoice Merge Tags only work with Invoice Triggers. They cannot be mixed. For example, you couldn't use an Invoice Merge Tag with a Job Trigger.

Condition Categories

CATEGORY	CONDITION	EXPLANATION	NOTES
Client/Lead	Account Balance	Client/lead must meet the Account Balance amount with the selected operator	Select an operator from the list and then an amount by using the areas in the next field.
	Account type	Client/lead must meet the specified account type	Available account types are: • Residential • Commercial
	Billing term	Client/lead must meet the specified billing term	Available billing terms are: • 1% 10 Net 30 • 2% 10 Net 30 • Due On Receipt • Net 15 • Net 30 • Net 60
	Branch	Client/lead must meet the specified branch	This condition is only available when branches are enabled. This can be done under Company Settings.
	Cancellation reason	Client/lead must meet the specified cancellation reason	
	Client/Lead status	Client/lead must meet the specified status	Available client/lead statuses: • All Client and Leads • Active Clients and Open Leads • Clients • Former Clients • Clients and Former Clients • Leads • Closed Leads

CATEGORY	CONDITION	EXPLANATION	NOTES
Client/Lead (cont.)	Client since date	Client/lead must meet the specified client since date range	Available operators are: • Less Than [date] • Greater Than [date] • Equal To [date] • Less Than or Equal To [date] • Greater Than Or Equal To [date] • Not Equal To [date]
	Client source	Client/lead must meet the specified client source	
	Contract is about to expire	Contract must expire within [x] number of days	This condition allows you to set [x] number of days before the contract expires. This condition checks once a day in search of contracts that will expire within the specified number of days.
	CSR	Client/lead must meet the specified customer service representative	The condition can be combined with a job trigger. If combined with: • A job trigger - it will use the CSR from the job. • If the job does <i>not</i> have a CSR, it will use the CSR from the client/lead settings

CATEGORY	CONDITION	EXPLANATION	NOTES
Client/Lead (cont.)	Custom Field	Client/lead must have the specified custom field	
	Does not have ACH on file	Client/lead does not have ACH on file	
	Does not have credit card on file	Client/lead does not have credit card on file	
	Has ACH on file	Client/lead has ACH on file	
	Has credit card on file	Client/lead has a credit card on file	
	Is opted in for emails	Client/lead must have opted in for emails	
	Is subscribed to email category	Client/lead must meet the specified email category	
	Map code	Client/lead must have the specified map code	
	Opt-In Texts	The Client/lead must have Opted-In , Opted-Out , or Needs Opt-In for texting	Needs Opt-In means the Client/lead has not opted in or out of texting.
	Payment method type	Client/lead must meet the specified payment method type	

CATEGORY	CONDITION	EXPLANATION	NOTES
Client/Lead (cont.)	Sales person	Client/lead must have the specified salesperson	This condition can be combined with an estimate and job trigger. If combined with: • <i>An estimate trigger</i> - it will use the salesperson from the estimate. • <i>A job trigger</i> - it will use the salesperson from the job. If the estimate or job does not have a salesperson, it will use the salesperson from the client/lead settings.
	Service Zip code	Client/lead must have the specified zip code	
Date	Date of year between	The current date must be within the specified date range	The specified date range will recur every year.
Estimate	Estimate has product	Client/lead's estimate must have the specified product(s)	This condition is available only when using an estimate related trigger.
	Estimate has service	Client/lead's estimate must have the specified service(s)	This condition is available only when using an estimate related trigger.
	Estimate sales rep	Client/lead's estimate must have the specified salesperson	This condition is available visit can only when using an estimate related trigger.

CATEGORY	CONDITION	EXPLANATION	NOTES
Estimate (cont.)	Estimate stage	Client/lead's estimate must meet the specified stage(s)	This condition is available only when using an estimate related trigger.
	Estimate status	Client/lead's estimate must meet the specified status(es)	This condition is available only when using an estimate related trigger.
	Estimate total	Client/lead must meet the specified estimate total range	This condition is available only when using an estimate related trigger. Available operators are: • Less Than [totalvalue] • More Than [totalvalue] • Less Than Or Equal To [totalvalue] • More Than Or Equal To [totalvalue]
Form	Has completed form	Client/lead must have submitted the specified form(s)	
Invoice	Invoice has product	Client's invoice must have the specified product(s)	This condition is available only when using an invoice related trigger.
	Invoice has service	Client's invoice must have the specified service(s)	This condition is available only when using an invoice related trigger.

CATEGORY	CONDITION	EXPLANATION	NOTES
Invoice (cont.)	Invoice past due	Invoice must be past due more than [x] number of days	This condition is available only when using an invoice related trigger. The condition allows you to set more than [x] number of days after the invoice is past due. This condition checks once a day in search of invoices that are past due more than the specified number of days.
	Invoice was paid	Invoice must be paid within [x] number of days	This condition is available only when using an invoice related trigger. The condition allows you to set [x] number of days for when an invoice has been marked paid. This condition checks once a day in search of invoices that have been marked paid within the specified number of days.
Job	Client currently has package scheduled	Client must have specified package(s) scheduled	
	Client currently has recurring job scheduled	Client must have specified recurring job(s) scheduled	
	Client does not currently have package scheduled	Client must not have the specified package(s) scheduled	
	Client does not currently have recurring job scheduled	Client must not have the specified recurring job(s) scheduled	

CATEGORY	CONDITION	EXPLANATION	NOTES
Job (cont.)	Client has ever had package	Client must have had the specified packages(s) scheduled at any time	
	Client has ever had recurring job	Client must have had the specified job(s) scheduled at any time	
	Client has not ever had package	Client must not have had the specified package(s) scheduled at any time	
	Client has not ever had recurring job	Client must not have had the specified recurring job(s) scheduled at any time	
	Last visit date	Client must have had the specified service within the specified number of days	Available operators are: • <i>service/package</i>] Less Than days • <i>[service/package]</i> Greater Than [x] days • <i>[service/package]</i> Equal To days • <i>[service/package]</i> Less Than Or Equal To [x] days • <i>[service/package]</i> More Than Or Equal To [x] days
	Visit requires call ahead	Client/lead's visit must require a call ahead	This condition is available only when using a job-related trigger.
Tag	Does not have tag	Client/lead must not have the specified tags	

CATEGORY	CONDITION	EXPLANATION	NOTES
Tag (cont.)	Has tag	Client/lead must have the specified tags	
Ticket	Calendar Event category	Calendar Event must have the specified category	
	Ticket Category	Ticket must have the specified category	
	Ticket past due	Ticket must be [x] days past due	This condition is available only when using a Ticket related trigger. The condition allows you to set more than [x] number of days after the Ticket is past due. This condition checks once a day in search of Tickets that are past due more than the specified number of days.