



Service **Autopilot**™

AUTOMATIONS

TRIGGERS & CONDITIONS

GUIDE

V3.1

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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 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 visit)**
- **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	The trigger allows 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	The 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	The trigger allows 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.
	Has Opted In For Emails	Runs if the client/lead opted in for emails	Opt-in is set by sending an opt-in email.

CATEGORY	TRIGGER	EXPLANATION	NOTES
Client/Lead (Cont.)	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	The trigger runs yearly (unless there is a stop condition).
	Run On Custom Field Date	Runs on the selected custom field date	The custom field type must be set to <i>date</i> .
	Run On Date	Runs on specified date	The trigger runs yearly (unless there is a stop condition).
	Run On Day Of Week	Runs on the specified day of the week	The trigger runs yearly (unless there is a stop condition).
	Run On Time Range	Runs on the specified time range	The trigger runs yearly (unless there is a stop condition).

CATEGORY	TRIGGER	EXPLANATION	NOTES
Estimate	Estimate Was Created	Runs when an estimate is created	
	Estimate Was Lost	Runs when an estimate is marked as lost	
	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	The 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	

CATEGORY	TRIGGER	EXPLANATION	NOTES
Job	Job was cancelled	Runs when a job is cancelled	This trigger looks at master recurring jobs and master package jobs.
	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 Completed	Runs when a visit is marked as completed	This trigger looks at the visit occurrence.
	Job Was Created	Runs when a job is created	This trigger looks at the master job.
	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.
	Package Was Created	Runs when a package is created	This trigger looks at the client package.
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	

CATEGORY	TRIGGER	EXPLANATION	NOTES
Tickets	Ticket Past Due	Runs when a Ticket becomes past due	This trigger runs once a day in search of past due Tickets, for up to 30 days past due.
	Ticket Was Closed	Runs when a Ticket is marked as Closed	
	Ticket Was Created	Runs when a Ticket is created	The status of the Ticket at the time it is created does not affect the trigger. All Tickets will trigger at the time they are created regardless of the Ticket status.
	Ticket Was Reopened	Runs when a Ticket is marked as open after it has been closed	

Condition Categories

CATEGORY	CONDITION	EXPLANATION	NOTES
CLIENT/LEAD	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
	Branches	Client/Lead must meet the specified branch	The condition is available only when branches are enabled. This can be set in the 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: <ul style="list-style-type: none"> - 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	The condition allows setting [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: <ul style="list-style-type: none"> - A job trigger, it will use the CSR from the job - If the job does not have a CSR, it will use the CSR from the client/lead settings
	Does Not Have Credit Card on File	Client/Lead has no credit card on file	

CATEGORY	CONDITION	EXPLANATION	NOTES
	Has a Card on File	Client/Lead has a credit card on file	
	Is Opted in for Emails	Client/Lead must have opted in for emails	
CLIENT/LEAD (cont.)	Is Subscribed to Email Categories	Client/Lead must meet the specified email categories	
	Payment Method Type	Client/Lead must meet the specified payment method type	
	Sales Person	Client/Lead must have the specified Sales Rep	<p>The condition can be combined with an estimate and job trigger. If combined with:</p> <ul style="list-style-type: none"> -An <i>estimate trigger</i>, it will use the sales person from the estimate -A <i>job trigger</i>, it will use the sales person from the job <p>If the estimate or job does not have a Sales Rep, it will use the sales person from the client/lead settings.</p>
DATE	Date of Year Between	The current date must be within the specified date range	The specified date range will recur every year.

CATEGORY	CONDITION	EXPLANATION	NOTES
ESTIMATE	Estimate has Product	Client's/Lead's estimate must have the specified product(s)	The condition is available only when using an estimate-related trigger.
	Estimate has Service	Client's/Lead's estimate must have the specified service(s)	The condition is available only when using an estimate-related trigger.
	Estimate Stage	Client's/Lead's estimate must meet the specified stage(s)	The condition is available only when using an estimate-related trigger.
	Estimate Status	Client's/Lead's estimate must meet the specified status(es)	The condition is available only when using an estimate-related trigger.
	Estimate Total	Client/Lead must meet the specified estimate total range	The condition is available only when using an estimate-related trigger. Available operators are: <ul style="list-style-type: none"> - 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)	


CATEGORY	CONDITION	EXPLANATION	NOTES
INVOICE	Invoice has Product	Client's invoice must have the specified product(s)	The condition is available only when using an invoice related trigger.
	Invoice has Service	Client's invoice must have the specified service(s)	The condition is available only when using an invoice related trigger.
	Invoice Past Due	Invoice must be past due more than [x] number of days	<p>The condition is available only when using an invoice related trigger.</p> <p>The condition allows setting 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.</p>
	Invoice was Paid	Invoice must be paid within [x] number of days	<p>The condition is available only when using an invoice-related trigger.</p> <p>The condition allows setting [x] number of days of 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.</p>

CATEGORY	CONDITION	EXPLANATION	NOTES
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	
	Client has Ever had Package	Client must have had at any time the specified packages(s) scheduled	
	Client has Ever had Recurring Job	Client must have had at any time the specified job(s) scheduled	
	Client has Not Ever had Package	Client must not have had at any time the specified package(s) scheduled	
	Client has Not Ever had Recurring Job	Client must not have had at any time the specified recurring job(s) scheduled	

CATEGORY	CONDITION	EXPLANATION	NOTES
JOB (Cont.)	Visit Requires Call Ahead	Client's/Lead's requires a call before the visit	The condition is available only when using a job-related trigger.
	Last Visit Date	Client must have had the specified visit within the specified number of days	Available operators are: <ul style="list-style-type: none"> - [service/package] Less Than days - [service/package] Greater Than [x] days - [service/package] Equal To days - [service/package] Less Than Or Equal To [x] days - [service/package] More Than Or Equal To [x] days
	Visit Status	Visit must meet the specified status	The condition is available only when using visit occurrence triggers. Available visit statuses: <ul style="list-style-type: none"> - Pending Dispatch - Dispatched - Completed - Cancel Visit - Waiting List - Skipped Please note that custom sub-statuses are not available as a selection.

CATEGORY	CONDITION	EXPLANATION	NOTES
TAG	Does Not have Tag	Client/Lead must not have the specified tags	
	Has Tag	Client/Lead must have the specified tags	
TICKETS	Ticket Category	Ticket must be the specified category	
	Ticket Past Due	Ticket must be [x] days past due	<p>The condition is available only when using a Ticket-related trigger.</p> <p>The condition allows to set more than [x] number of days after the Ticket is past due. This condition checks once a day in search of Ticket's that are past due more than the specified number of days.</p>

Vocabulary

Branch	An IF event can be edited to have different outcomes based on different conditions, presented as ELSE conditions. This is called <i>branching</i> .	
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 job – or an accounting change – invoice generation, failed credit card charge – or any of several other modifications to a feature in the system.	
