Drip Triggers

03/14/2025 9:11 am CDT

Overview

service**minder** Drips allows you to hook into all sorts of events in real time. Drips is the heart of service**minder** automation and integration capabilities. You can build sophisticated automations and integrations. If you really want to automate and optimize your business processes, Drips is the tool you need.

> **Drips** is a separate feature and may be an additional charge if it is not already available within your account.

Drips is comprised of two sections:

1. Triggers
2. Campaigns

In this article, we will focus on **Triggers,** which are events that you've told the system to wait for and what to do when it happens. Examples would include:

1. Change a TaskBoard State
2. Send a one-time Text Message or Email
3. Send a Notification

Triggers fire on one thing - a proposal is sent or a contact category changes. If this is what you're looking for, then there is no need to create a **Campaign**, because it's a "one and done" action.

Click here to learn more about Drip Campaigns.
Click here to see a Full List of Triggers and Actions.

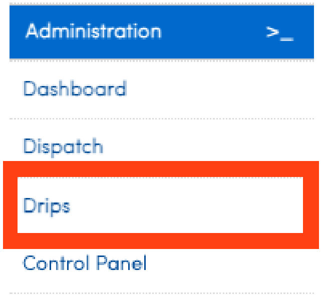
Video Tutorial

Please watch the video below for a quick lesson on Drip Triggers.

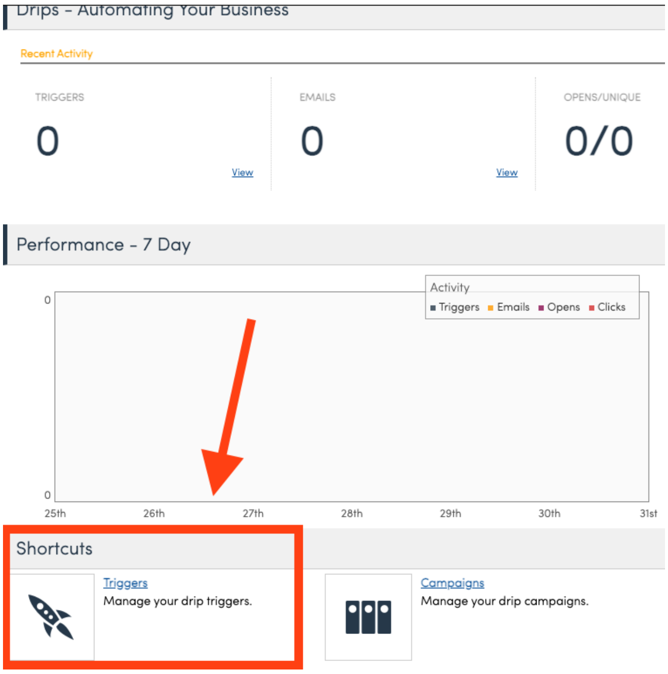
Your browser does not support HTML5 video.

Settings and Navigation

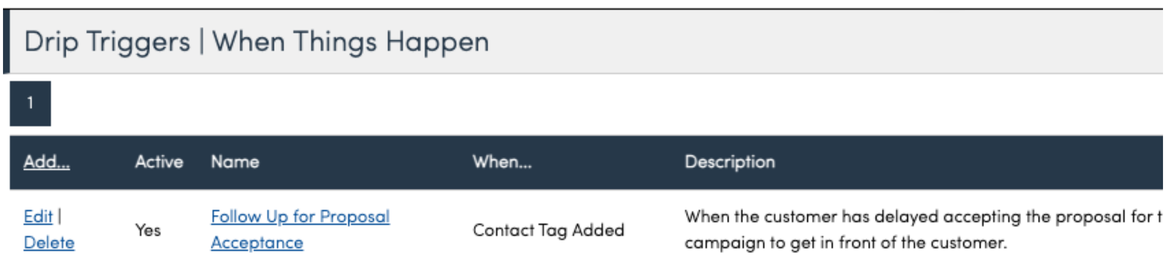
In the side **Navigation** panel, scroll to the **Administration** section and select **Drips**.



After clicking on **Drips**, you will see this page and choose **Triggers**.



Then you will arrive on the **Drip Triggers** page allowing you to create a new trigger or edit an existing.



Drip Triggers | When Things Happen

1

Add...	Active	Name	When...	Description
Edit | Delete	Yes	Follow Up for Proposal Acceptance	Contact Tag Added	When the customer has delayed accepting the proposal for t campaign to get in front of the customer.

Considerations

If you are building a sales pipeline or other complicated, multi-step triggers, we strongly urge you to write it all out on a whiteboard, spreadsheet, or notepad. Walk through each step and consider how your owners work in the field will merge with the business flow within service**minder**.

If you need to go back and consult when something was supposed to happen and decipher why it didn't, having a documented flow will greatly assist you and the SM support staff if you need their help in making adjustments.

Matching Email type to Trigger type

When setting up a trigger and action, the options for the action may depend on the type of trigger.

For instance, if an appointment being scheduled is the trigger and you want the action to be Send Email, the email templates available to you will be Appointment type templates.

Or for a proposal-type trigger, email templates that are Proposal type will be available.

> You will need to create your ad hoc email templates ahead of time to use them in Drip Triggers or Email Campaigns. Ad Hoc Templates also include Texting templates if you utilize the Two-Way Texting feature. You can edit those templates and use text-specific triggers or Drip Campaign messages.

Matching Taskboard type to Trigger type

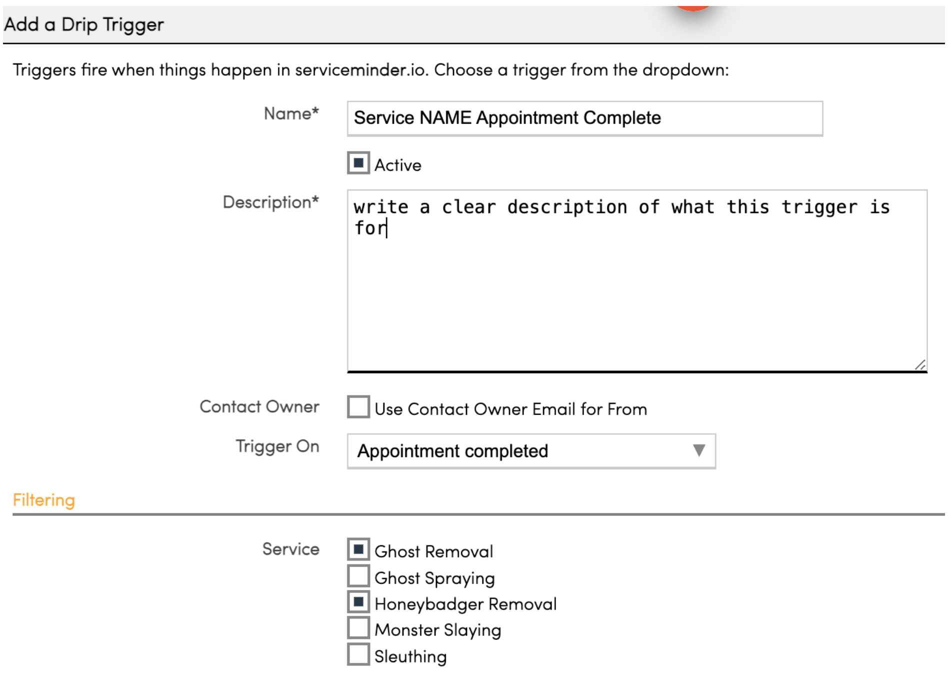
A trigger can stand alone and not be connected to a TaskBoard. However, it is common to use both of these things together. If you are using a Trigger to move or add something to a TaskBoard, you need to make sure the type or board and type of trigger align.

A Contact-based TaskBoard will not do well with invoice-based triggers. Invoice triggers are better for Proposal-type TaskBoard.

Learn more about TaskBoards.

Create a Trigger

To create a trigger, first click the **Add** in the top left header column on the Drip Triggers page. Then, you will see this page.

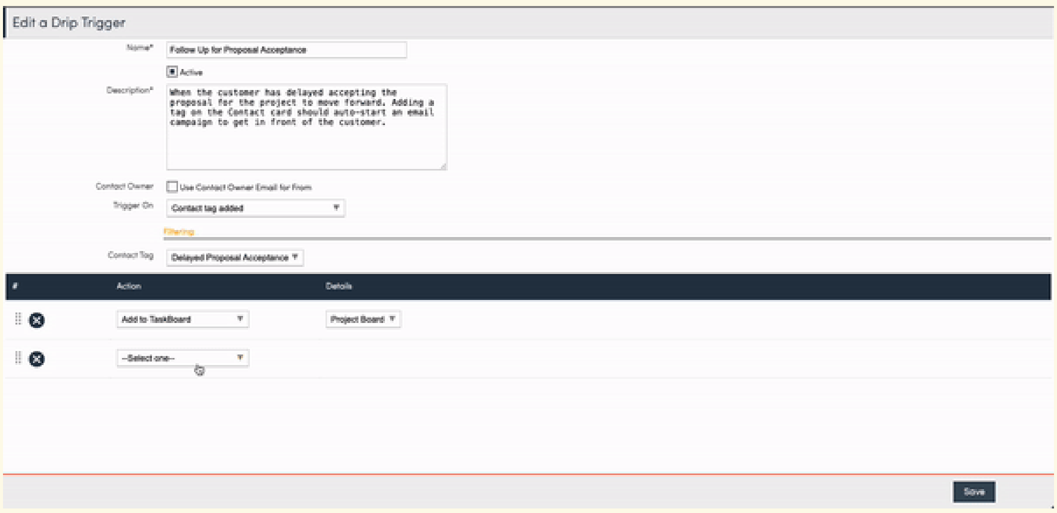


1. You must add a Name and Description. As with everything in SM, required fields are marked with a * (asterisk).

2. Then you will choose from the dropdown for **Trigger On**.
   - Some Triggers allow you to filter by Part or Service. For instance, you can only make this trigger happen when an appointment is completed for a pest removal service or a free in-home estimate.

3. Choose what **Action** should happen if this trigger occurs.
   - If a message is involved, then choose the template from the dropdown. If you you are moving a contact card in a TaskBoard , choose the TaskBoard and State (swim lane)

4. Hit **Save**.

> If you are including a second step in the building of the trigger like setting a taskboard state or creating an Exit If, you need to save that step before saving the overall trigger.
>
> 
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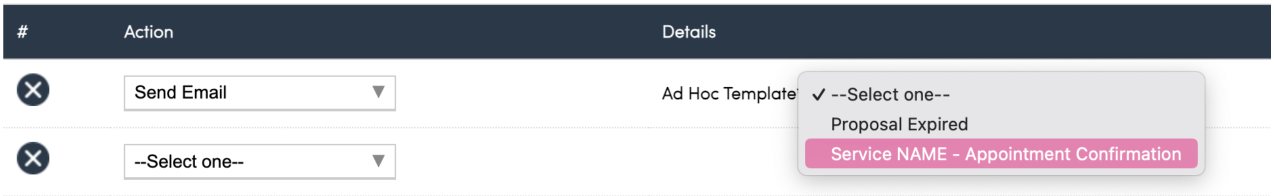
Filtering By Service or Part

Depending on the Trigger that you choose, you can apply it to certain Services or Parts included for that appointment, proposal, or invoice.

Ad Hoc Emails

For any trigger associated with an email, you will need to create ad hoc email templates ahead of time to use.

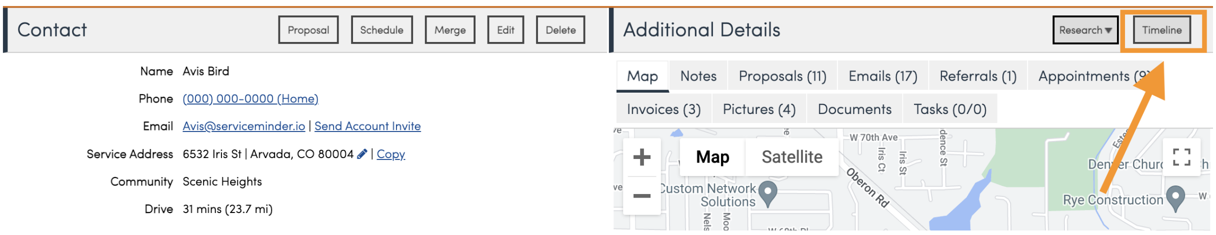


Learn more about ad hoc email templates.

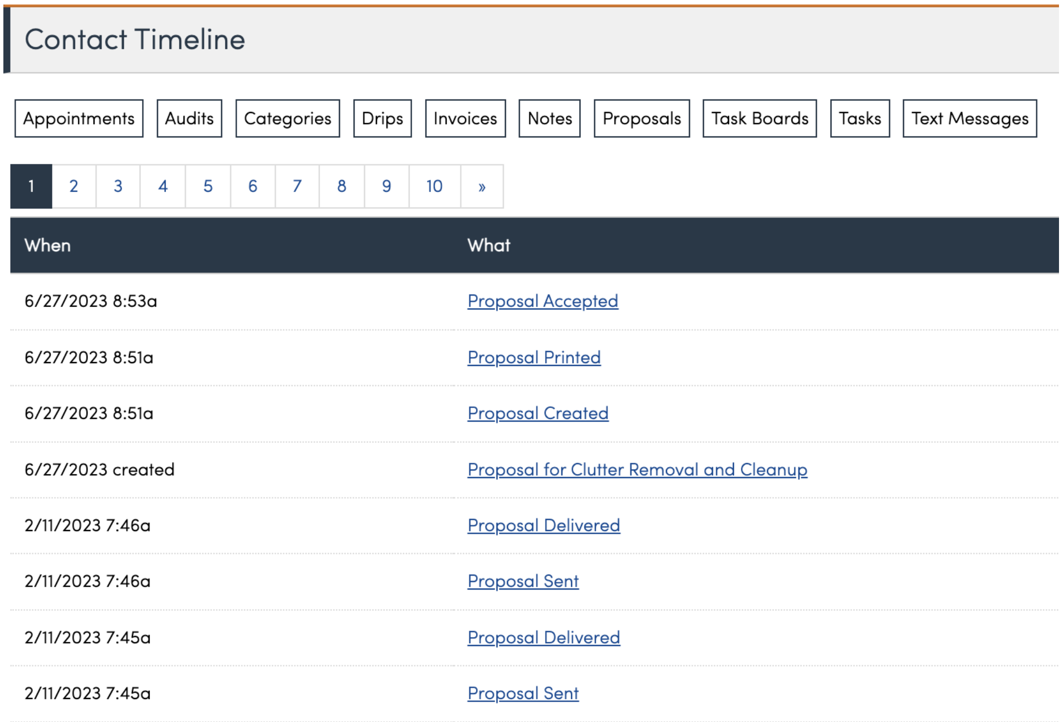
Testing Triggers

If you want to test triggers, create a test Contact (like Person Test A). Run them through the triggers, meaning that you schedule an appointment for them, change their contact category, send a proposal, etc.

All triggers will display on their Contact Details page. Go to the Timeline button on that Contact to review.



You can even filter the Timeline by Drips, Tasks, or Taskboards if you are looking for something specific.



Contact Timeline

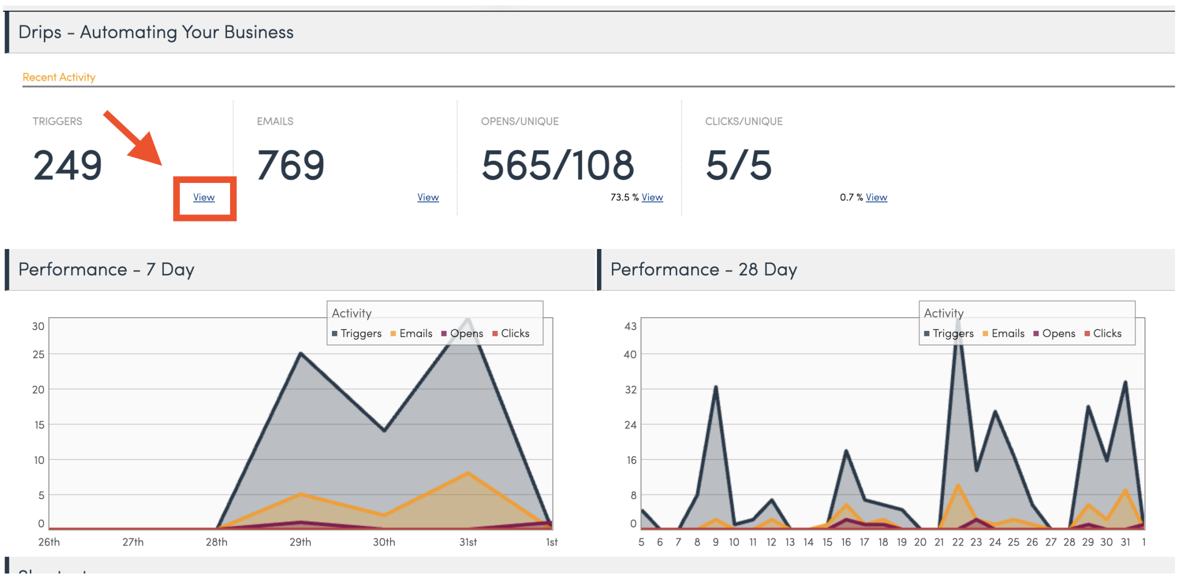
Appointments | Audits | Categories | Drips | Invoices | Notes | Proposals | Task Boards | Tasks | Text Messages

1 2 3 4 5 6 7 8 9 10 »

When	What
6/27/2023 8:53a	Proposal Accepted
6/27/2023 8:51a	Proposal Printed
6/27/2023 8:51a	Proposal Created
6/27/2023 created	Proposal for Clutter Removal and Cleanup
2/11/2023 7:46a	Proposal Delivered
2/11/2023 7:46a	Proposal Sent
2/11/2023 7:45a	Proposal Delivered
2/11/2023 7:45a	Proposal Sent

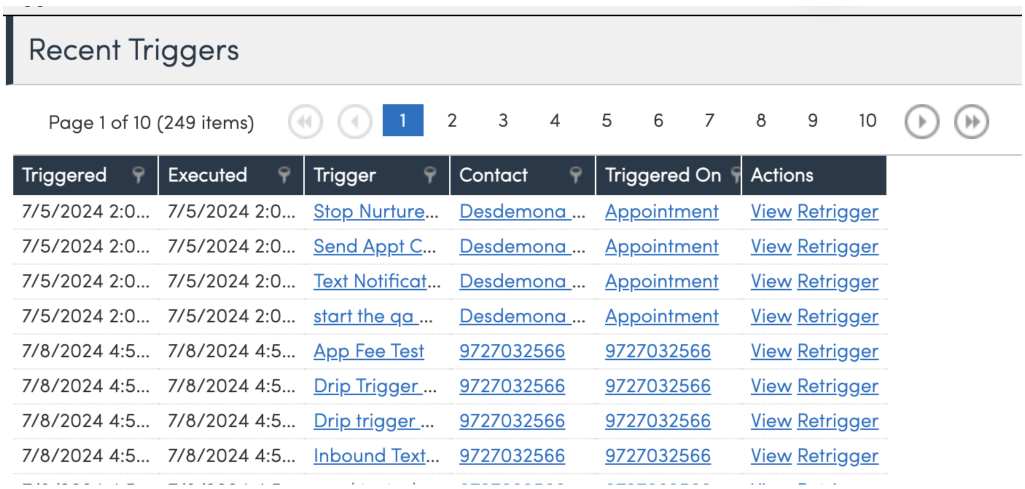
Trigger Reporting

If you go back to the main Drips page, you will have charts and available stats if you have active triggers or campaigns running.



Click **View** to get details on triggers.

There, you will see every trigger that has fired. You can then **View** that action or **Retrigger** if needed.



Recent Triggers

Page 1 of 10 (249 items) 1 2 3 4 5 6 7 8 9 10

Triggered	Executed	Trigger	Contact	Triggered On	Actions
7/5/2024 2:0...	7/5/2024 2:0...	Stop Nurture...	Desdemona ...	Appointment	View Retrigger
7/5/2024 2:0...	7/5/2024 2:0...	Send Appt C...	Desdemona ...	Appointment	View Retrigger
7/5/2024 2:0...	7/5/2024 2:0...	Text Notificat...	Desdemona ...	Appointment	View Retrigger
7/5/2024 2:0...	7/5/2024 2:0...	start the qa ...	Desdemona ...	Appointment	View Retrigger
7/8/2024 4:5...	7/8/2024 4:5...	App Fee Test	9727032566	9727032566	View Retrigger
7/8/2024 4:5...	7/8/2024 4:5...	Drip Trigger ...	9727032566	9727032566	View Retrigger
7/8/2024 4:5...	7/8/2024 4:5...	Drip trigger ...	9727032566	9727032566	View Retrigger
7/8/2024 4:5...	7/8/2024 4:5...	Inbound Text...	9727032566	9727032566	View Retrigger

Inactive Triggers

If you have older triggers that you are replacing with newer ones, you will want to make old triggers **Inactive**. Otherwise, they will be competing against each other and both versions will fire. Inactive triggers will not fire, but you will still have data in the system for reporting or tracking.

Just uncheck the Action box when editing the old trigger.

Best Practices

- Technically, multiple actions for a single trigger can happen concurrently (in unison). We suggest putting actions in order of when you would like them to happen within the trigger.

- Appointment-based triggers are best for Contact-type TaskBoards, instead of Proposal-type TaskBoards.
    - Triggers based on appointments don't see that they should be tied to a proposal.
    - A trigger may be able to add a contact or proposal to a board even if it is a different type, but it is moving it around to other swim lanes (columns) on the TaskBoard that become the problem.

- There is no way to quickly edit a TaskBoard to be a different type (Contact or Proposal). You will have to rebuild it if you decide to use a different collection of triggers that don't match up.

- **Exit If** triggers are incredibly important. If you don't want a certain type of Contact to get an email, you can filter them out based on tag or category.
    - For instance, if you have a category DO NOT CONTACT, create a trigger that stops all campaigns (meaning email drip campaigns) or removes them from all TaskBoards. That way, they don't accidentally get reached out to.
    - Place Exit Ifs first thing if you have several actions firing on that trigger.
    - If the contact falls into that particular category AFTER the Exit If has fired, then it won't retroactively kick out the contact from receiving the campaign. Consider making that contact campaign change it's own trigger to stop the campaign. That way, whenever it happens, the contact is removed.

- Another consideration is the final TaskBoard swim lane (column). How will a contact leave the TaskBoard? Do you want to manually X out people to remove them from a TaskBoard or do you want to create a trigger that removes them automatically after 3 months? You can achieve this with Drip Campaigns.

- If you are unsure if what is the best move forward, test it! We do it all the time here at service**minder**. Create different steps, run a test contact through the triggers and see if it works properly. Adjust it if it doesn't.

FAQ

Are there conflicts between selecting parts and services when filtering for triggers? Should you only select a part and not a service or vice versa?

Depending on your workflow and intentions, it may work best if they are only filtered on parts (OR) services rather than both.

In general, if you are filtering by both services and parts using the checkboxes, that will work as an **AND** qualifier. So to trigger the action, the appointment would have to contain the service *and* the part.

For triggers that only have services or only have parts selected, those work as an **OR** qualifier. So it will trigger if the appointment contains either Service A or Service B (the same goes for parts).
