Full List of Triggers and Actions

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Overview

Triggers are the "When" and **Actions are the "What"**. So you are telling service**minder** to look for something to happen and then do set into motion which actions. There are similarities between what you can do for both triggers and actions, so we did not go into detail about each of them.

List of Triggers

Trigger	Details
Ad Hoc Form Attached Appointment	Select which Form will trigger the action.
Ad Hoc Form Attached Invoice	Select which Form will trigger the action.
Ad Hoc Form Attached Proposal	Select which Form will trigger the action.
Ad Hoc Form Signed Appointment	Select which Form will trigger the action.
Ad Hoc Form Signed Invoice	Select which Form will trigger the action.
Ad Hoc Form Signed Proposal	Select which Form will trigger the action.
Appointment Booked via API	Filter by services or parts. Choose whether or not to include queued appointments.
Appointment Canceled	Filter by services and/or parts.
Appointment Completed	Filter by services and/or parts.
Appointment Confirmed	Filter by services and/or parts.
Appointment Deposit Added	Triggers for all deposits on appointments.
Appointment Scheduled	Filter by services or parts. Choose whether or not to include queued appointments.
Appointment Started	Filter by services and/or parts.
Callback Queue Completed	Fires whenever the call center finishes a Dispatch Queue callback campaign
Call-to-Action Response	Filter by which Call-to-Action.
Change Order Created	Filter by services and/or parts.
Checklist Completed	Filter by checklist template.
Contact Added	Filter by category, accounting class, and/or marketing channel.
Contact Added via API	Fires only when someone is added to your account using the API (aka a web lead form). This allows you to have separate actions occur for these Contacts rather than every Contact.
Contact Added via Texting	Fires only when someone is added to your account using texting.
Contact Category Changed	Filter by category.
Contact Email Bounced	Fires every time an email bounces.
Contact Invoiced	Filter by services or parts.
Contact Name Updated	Filter by category, accounting class, and/or marketing channel.
Contact Owner Assigned	Filter by category, accounting class, and/or marketing channel.
Contact Shared	Filter by category, accounting class, and/or marketing channel.
Contact Tag Added	Select which Tag triggers the event.
Contact Tag Removed	Select which Tag triggers the event.
Contact Unsubscribed	Filter by contact category.
Contact Updated	Filter by category, accounting class, and/or marketing channel.

Trigger	Details
Contact Updated via API	Filter by category, accounting class, and/or marketing channel as well as which API key.
Credit Card Updated Online	Filter by category, accounting class, and/or marketing channel.
Feedback Received	Requires the Feedback and Issue Management add-on.
First Appointment Completed	Filter by services and/or parts.
First Appointment Scheduled	Filter by services and/or parts.
Form Submitted	Select a form that will trigger the event.
Inbound Text	Filter by category, accounting class, and/or marketing channel.
Installment Payment Failed	Fires when any installment payment is not successfully charged.
Invoice Approved	Filter by services and/or parts.
Invoice Paid	Filter by services and/or parts. Specify for Credit Hold Only.
Invoice Partial Payment	Filter by services.
Invoice Sent	Filter by services and/or parts.
Invoice Updated	Filter by services and/or parts.
Issue Closed	Requires the Feedback and Issue Management add-on.
Issue Resolved	Requires the Feedback and Issue Management add-on.
Last Appointment Completed	Filter by services and/or parts.
Last Appointment Completed for Proposal	Filter by services and/or parts.
New Referral	Fires for every new referral.
Project Created	Filter by service.
Proposal Accepted	Filter by services and/or parts.
Proposal Completed	Filter by services and/or parts.
Proposal Declined	Filter by services and/or parts.
Proposal Deposit Added	Fires for every deposit added to a proposal.
Proposal Expired	Filter by services and/or parts.
Proposal Printed	Filter by service.
Proposal Rescinded	Fires for every rescinded proposal.
Proposal Scheduled	Filter by services and/or parts.
Proposal Sent	Filter by services and/or parts.
Proposal Unsubscribed	Filter by services and/or parts.
Proposal Walkthrough Completed	Filter by services and/or parts.
Recurring Billing Canceled	Filter by service.
Refunded	Filter by services and/or parts.
Service Renewal Due	Filter by service.
Taskboard Item Updated	Fires whenever the card (also called item) on a taskboard is edited or changed. This includes manual moves or removals from swim lanes (taskboard states).
Tip Received	Filter by services and/or parts.

List of all Actions

You can have a trigger with one action or several actions. We do not recommend 10 actions happening on a single trigger, because that can be very complicated. If you have multiple things you want to happen (and over a course of time), Drip Campaigns are a good solution for that.

Trigger	Details	Example
Add Ad Hoc Form	Add an already-configured ad hoc form to an appointment, proposal, invoice, or contact (depending on what the trigger is). Select the form from the dropdown menu, add a note, and select if it should be required or not.	When a proposal is created, add a warranty form to it that the customer must sign.
Add Note	Give the note a title and body. This note will be the same every time it is triggered. It will be added to the triggering item (appointment, proposal, or invoice) unless you check the box to add it to the contact instead.	When an appointment is cancelled, add a note to the appointment or contact with next steps.
Add Recurring Billing	Choose the recurring billing plan you want to add. If you don't want it to start immediately, set how many days after the triggering event you want it to start. Set an amount override if you want the same amount to be charged for every contact triggering this action.	When a monthly cleaning proposal is accepted, initiate a monthly recurring billing plan to start 5 days after the acceptance.
Add Tag	Choose a tag to add to the contact.	When a Weekly Maintenance proposal is accepted, tag the customer with a Weekly Maintenance tag.
Add to Taskboard	Select a TaskBoard and "state" (column) to add the appointment, contact or proposal to.	When a proposal is sent, move the contact to the "Follow Up" state in the "Sales Process" TaskBoard.
Align Campaign Window	Set a timeframe when the following actions will be executed, i.e. send emails or text during business hours.	Put this action **before** any other actions that you want to occur within that time frame.
Assign Checklist	Choose a checklist and choose which user you want to assign it to.	When a proposal is accepted, assign a checklist to the person in charge of ordering the required materials.
Copy to Organization	Mostly used for National Accounts; copies the item over to the National Account org if one is hooked up.	
Copy Unselected Options		
Create Proposal	Automatically generate a proposal for a contact. Use a proposal template or select a service, set a scale (the system will multiply the unit price by the scale), then choose whether or not to include discounts or send to the contact.	When an Estimate appointment is complete, a proposal is automatically generated and sent to the contact.
Create Task	Assign a Task, Call, or Email to a specific user.	When a new lead is added via API, assign a user the task to call them.
Distribute Parts	Distribute or Remove any parts on a change order across all remaining appointments, using part distribution settings. Choose to Zero pricing on appointments.	A customer adds an additional part to their package midway through the season. Distribute the associated parts across all remaining appointments.

Trigger	Details	Example
Exit If	Exit Ifs are to stop the trigger and will prevent any further actions concerning that trigger. You can exit a contact from a drip based on Contact Tag, Contact Category,Parts, or Services.	Exit a contact from a drip campaign if they have the "Seasonal" tag.
FORM POST	Posts (sends) data to a specific URL (webhook) with a payload formatted in FORM.	
JSON POST	Posts (sends) data to a specific URL (webhook) with a payload formatted in JSON.	
Publish Subscription Event		
Remove from TaskBoard	Remove contact from selected TaskBoard.	If a contact accepts a proposal, remove them from the Sales Pipeline TaskBoard.
Remove Tag	Remove a tag from a contact.	When a contact cancels their monthly subscription to your services, remove the "Monthly" tag.
Restart Campaign	Start a Drip Campaign over from the beginning.	When a customer enrolls in a new program, start the associated drip campaign over again.
Schedule Service	Schedule an appointment with a specific service. Filter parts - if parts are included, and an existing un-started appointment with the same service is there, the parts will be added to that existing appointment.	When a pick-up appointment is scheduled, automatically schedule the drop-off appointment 48 hours later.
Send Email	Send an email to a contact.	After an appointment is complete, send an email asking for a review.
Send Notification	Send a notification to a user.	
Send pulseM Email	If you use pulseM, send an email to a contact.	After a proposal is sent, send a follow up email.
Send pulseM Text	If you use pulseM, send an email to a contact.	After a proposal is sent, send a follow up text.
Send SendJim QuickSend	If you use SendJim,	
Send Text	If you have the Texting add-on, send a text to a contact.	After an appointment is complete, send a follow up text.
Set Appointment Flash	Set a flash message banner on an appointment page.	When an appointment is scheduled, create a flash message on the appointment with important item to remember.
Set Auto Offer Code	Put an offer code on the triggering proposal or invoice.	When an invoice is created for a specific service, automatically add an offer code creating a discount.
Set Category	Set a contact category.	When a customer accepts a monthly service proposal, set their Category to "Recurring Customer."

Trigger	Details	Example
Set Contact Flash	This will update/edit the Flash Message on the Contact Details page.	When a contact is added, set a flash message banner on their page that says "New Lead."
Set Credit Hold	Set a credit hold for a contact.	
Set Owner	If you are using a Contact-based trigger then it uses Contact Owner. Proposal trigger will use Proposal Owner.	When a proposal is generated, set the Owner of the proposal automatically.
Set TaskBoard State	State is another word for "swim lane" or "column" within a TaskBoard. You are telling the system to move to a particular step of the TaskBoard.	When an invoice is sent to a lead, set them to the "Follow Up" state on the "Lead Pipeline" TaskBoard.
Start Campaign	This is referencing to Drip Campaigns. Marketing Email Campaigns are not connected to Drips.	When a contact responds to a call-to-action, start a nurturing drip campaign for them.
Stop All Campaigns	Whatever Drip Campaigns you have built, this action will stop every single one from being sent to a particular Contact.	When a contact category is changed to Terminated (maybe they moved states), stop all active campaigns for them.
Stop Campaign	You will have to specify which Drip Campaign to halt for a Contact.	When a contact category is changed to Inactive, stop their active drip campaign.
Stop Recurring Billing	End an active recurring billing plan.	When a customer cancels all future monthly services, stop the associated recurring billing plan for them.