Top 10 Questions: Taskboards and Drips

11/19/2025 3:57 pm CST

1. Do appointment triggers work on a Contact TaskBoard?

Yes, appointment triggers work on a Contact-type TaskBoard.

- **Appointment triggers are best suited for Contact TaskBoards.**
  Triggers like *appointment scheduled* or *appointment completed* can reliably move Contacts between TaskBoard lanes or automate actions like assigning tasks or sending follow-ups.

- **Proposal triggers generally do not work on Contact TaskBoards (and vice versa).**
  When appointment triggers are used on a Proposal-type TaskBoard—or proposal triggers are used on a Contact-type TaskBoard—you may see inconsistent behavior, such as triggers not firing or cards not moving.

- **Testing is essential.**
  To confirm that a trigger will work as expected, set the Action to something simple (e.g., **Set TaskBoard State**) and run it on a test Contact. This ensures the Contact appears in the correct lane of the board you are building.

2. Do I have to use Contact Categories or Tags to move people between TaskBoard lanes?

No. Categories and Tags are common methods, but not the only ones. On Contact-type TaskBoards, Contact-based triggers work best, and some appointment triggers can also work. Proposal triggers generally will *not* fire on Contact boards.

If you use **ExitIF** Actions, those rely *only* on categories or tags. Outside of ExitIF logic, you can use whichever trigger conditions align with your business flow.

3. How do I set up a long-term customer follow-up sequence?

In this case, it's best to use a **Drip Campaign**, instead of a single trigger. Triggers are best for immediate actions happening at a single point in time. Campaigns allow you to schedule steps over days, weeks, or months.

A common setup is:

- **Drip Trigger:** Start Campaign

- **Campaign:** Includes the relevant steps at 3, 6, and 12 months after the campaign was started.

Drip Campaigns can contain dozens of timed steps, while triggers should remain simple (typically one action or a small cluster that must occur simultaneously).

4. How do I edit the “Type” of a TaskBoard?

You cannot change a TaskBoard’s type once created. You will need to build a new one.

Before building, decide whether the process is driven by **Contact triggers** or **Proposal triggers**, since that determines the board type.
Many brands build two pipelines:

- A **Lead (Contact) TaskBoard**
- A **Proposal TaskBoard**
  Triggers can move a Contact from one pipeline to the other when a proposal is sent.

5. When should I consider someone a “Customer” in my TaskBoard?

This is a business decision that is ultimately up to you. By default, ServiceMinder labels someone as a customer after their **first paid invoice**.
You can customize this by using triggers that shift Categories, Tags, or TaskBoard states at different points in your process.

6. How many TaskBoards and Drip Triggers do most brands use?

It varies widely! Some brands build a single, simple TaskBoard, while others create several detailed pipelines. A typical range is **0–5 TaskBoards**.

Drip triggers and Campaigns also vary, and many brands create them but keep some inactive until needed.

Start small, especially if you’re still defining your sales pipeline or customer journey.

7. What are the steps to build my first Drip Campaign and TaskBoard?

1. **Define your TaskBoard type** (Contact vs. Proposal) and outline your lanes.
2. **Document your process**:
   - What triggers the campaign?
   - What steps happen, and on what timeline?
   - When should Contacts move to new lanes?
3. **Create all ad-hoc emails** that will be used in the campaign.
4. **Build the Campaign** (e.g., “When X happens, send Email A after 7 days”).

5. **Set up Triggers** that start the campaign when the appropriate event occurs.

8. Can I disable a Drip Campaign for a specific Contact?

Yes. Go to the **Contact > Additional Details > Drips > click End** next to the campaign you want to stop.

9. Can I delete triggers or campaigns?

You can **make triggers and campaigns inactive**, but not delete them, as they are tied to historical Contact data used for reporting.

10. Why are some cards red on my TaskBoard?

A red border indicates something is **overdue**, usually a task linked to that Contact or Proposal. For example, if a trigger creates a follow-up call task after an appointment, and that task is not completed before its due date, the card will turn red.