Contact Automations

	Available conditions that trigger an automation			Available actions when conditions are met	
	Condition	Logic	Options	Action	Options
Event Based (immediate)	Type	= or ≠	Any contact workflow, such as Residential Retail, Service & Repairs, etc.	Create Task	Set task: task, phone call, meeting, etc. Set task start date and priority Assign to: current assignees, contact, team members, all related contacts
	Status	= or ≠	Any status in a workflow, such as Lead, Appointment, etc.	Send Email	Select email template Set recipients: current assignees, contact, team members, all related contacts
	Sales Rep	= or ≠	Any company Sales Rep	Webhook	Webhook URL
	Custom Fields*				
	= or ≠ means "is equal to" or "is not equal to"				
Time Based (occurs at set time before or after event)	Set Date	before, after	Status change date, date created, date estimated, start/end date, date invoiced, and more	Create Task	Set task: task, phone call, meeting, etc. Set task start date and priority Assign to: assignees, employees, contact, etc.
	Type	= or ≠	Any workflow (ex. Repairs)	Send Email	Select email template Set recipients
	Status	= or ≠	Any workflow status (ex. Lead)	Change Status	Select type: any workflow (ex. repairs) Change status to: (any workflow status)
	Sales Rep	= or ≠	Any company Sales Rep	Webhook	Webhook URL
	Assigned to	= or ≠	Any team member		
	Custom Fields*				
	*See Custom Field Conditions for customizable contact conditions				

Example

Never Lose a Lead: When a lead comes in, you want to be notified when a lead has not progressed within 3 days.

1. Create a new automation that uses a time based trigger type.
2. Set trigger record to Contact.
3. Run the automation 3 days after "Date Status Changed".
4. Add the Condition "If Status is equal to Lead".
5. Add an action that creates a follow up task and assign it to yourself.

With this automation, if a contact has remained a lead for 3+ days, you will receive a task to follow up with your team immediately.

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Job Automations

	Condition	Logic	Options	Action	Options
	Available conditions that trigger an automation			**Available actions when conditions are met**	
Event Based (immediate)	Type	= or ≠	Any contact workflow, such as Residential Retail, Service & Repairs, etc.	Create Task	Set task: task, phone call, meeting, etc. Set task start date and priority Assign to: current assignees, contact, etc.
	Status	= or ≠	Any status in a workflow, such as Lead, Appointment, etc.	Send Email	Select email template Set recipients: current assignees, contact, etc.
	Sales Rep	= or ≠	Any company Sales Rep	Change Status - Parent Contact	Select type: any workflow (ex. Repairs) Change status to: (any workflow status)
	Custom Fields*			Webhook	Webhook URL
	= or ≠ means "is equal to" or "is not equal to"				
Time Based (occurs at set time before or after event)	Set Date	before, after	Status change date, date created, date estimated, start/end date, date invoiced, and more	Create Task	Set task: task, phone call, meeting, etc. Set task start date and priority Assign to: assignees, employees, contact, etc.
	Type	= or ≠	Any workflow (ex. Repairs)	Send Email	Select email template Set recipients
	Status	= or ≠	Any workflow status (ex. Lead)	Change Status - Parent Contact	Select type: any workflow (ex. repairs) Change status to: (any workflow status)
	Sales Rep	= or ≠	Any company Sales Rep	Change Status - Job	Select type: any workflow (ex. repairs) Change status to: (any workflow status)
	Assigned to	= or ≠	Any team member	Webhook	Webhook URL
	Custom Fields*				
	*See Custom Field Conditions for customizable job conditions				

Example

Send a thank you and ask for a review after job completion:

1. Create a new automation that uses an event based trigger type.
2. Set trigger to "When a Job is Modified".
3. Add the condition "If Status is equal to Paid & Closed".
4. Add an action that sends an email template for thanking customers and asking for a review. Set the receipients to Primary Contact.

With this automation, the contact on the job will get an automated thank you email and ask them to leave a review.

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Task Automations

Event Based (immediate)

Available conditions that trigger an automation

Condition	Logic	Options
Is Completed	= or ≠	True/False
Priority	= or ≠	None, High, Medium, Low
Task Type	= or ≠	Task, Phone Call, Appointment, Meeting, all custom task types
Sales Rep	= or ≠	Any company Sales Rep

= or ≠ means “is equal to” or “is not equal to”

Time Based (occurs at set time before or after event)

Set Date	Before/ After	Date created, date updated, end date & time, start date & time
Is Completed	= or ≠	True/False
Priority	= or ≠	None, High, Medium, Low
Task Type	= or ≠	Task, Phone Call, Appointment, Meeting, all custom task types
Sales Rep	= or ≠	Any company Sales Rep
Assigned to	= or ≠	Any team member

Available actions when conditions are met

Action	Options
Create Task	Set task: task, phone call, meeting, etc. Set task start date and priority Assign to: current assignees, contact, etc.
Send Email	Select email template Set recipients: current assignees, contact, etc.
Change Status - Parent Contact	Select type: any workflow (ex. Repairs) Change status to: (any workflow status)
Change Status - Parent Job	Select type: any workflow (ex. Repairs) Change status to: (any workflow status)
Webhook	Webhook URL

Example

Automated notifications if important tasks are not completed by your team members:

1. Create a new custom task type called “High Priority Task” for a team member. (In settings)
2. Create a new automation that uses a time based trigger type.
3. Set trigger record to Task and set the automation to run 1 day after date created.
4. Add 2 conditions that all must be true. “If Is Completed is equal to False” and “If Task Type is equal to High Priority Task”.
5. Add an action that creates a task assigned to you reporting if a high priority task is not completed within a day.

With this automation, if a high priority task is not completed, you receive a notification to follow-up and can view the details of the original high priority task.

Estimate Automations

	Available conditions that trigger an automation		
	Condition	Logic	Options
Event Based (immediate)	Date	Occurs, Before, After	Today, yesterday, this week, last week, last month, this year, last year, tomorrow and more
	Signature Status	= or ≠	Not Requested, requested, partially signed, fully signed
	Status	= or ≠	Draft, sent, denied, approved, invoiced, void
	Sales Rep	= or ≠	Any company Sales Rep
Time Based (occurs at set time before or after event)	Set Date	before, after	Date created, date estimate, date status change, date updated
	Date	Occurs, Before, After	Today, yesterday, this week, last week, last month, this year, last year, tomorrow and more
	Status	= or ≠	Draft, sent, denied, approved, invoiced, void
	Sales Rep	= or ≠	Any company Sales Rep

Available actions when conditions are met

Action	Options
Create Task	Set task: task, phone call, meeting, etc. Set task start date and priority Assign to: current assignees, contact, etc.
Send Email	Select email template Set recipients: current assignees, contact, etc.
Change Status - Parent Contact	Select type: any workflow (ex. Repairs) Change status to: (any workflow status)
Change Status - Parent Job	Select type: any workflow (ex. Repairs) Change status to: (any workflow status)
Webhook	Webhook URL

= or ≠ means “is equal to” or “is not equal to”

Example

Notification for when an estimate is fully signed:

1. Create a new automation that uses an event based trigger type.
2. Set the trigger to “When an Estimate is Modified”.
3. Add the Condition “If Signature Status is equal to Fully Signed”.
4. Add an action that creates a task to notify that signatures have been received.

With this automation, the moment an estimate is fully signed, you are notified and can move the job to the next status and begin planning.

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Invoice Automations

Event Based (immediate)

Available conditions that trigger an automation

Condition	Logic	Options
Date	Occurs, Before, After	Today, yesterday, this week, last week, last month, this year, last year, tomorrow and more
Status	= or ≠	Draft, sent, opened, closed, cancelled, void
Sales Rep	= or ≠	Any company Sales Rep

Time Based (occurs at set time before or after event)

Condition	Logic	Options
Set Date	before, after	Date created, date invoiced, date status change, date updated
Date	Occurs, Before, After	Today, yesterday, this week, last week, last month, this year, last year, tomorrow and more
Status	= or ≠	Draft, sent, denied, approved, invoiced, void
Sales Rep	= or ≠	Any company Sales Rep

Available actions when conditions are met

Action	Options
Create Task	Set task: task, phone call, meeting, etc. Set task start date and priority Assign to: current assignees, contact, etc.
Send Email	Select email template Set recipients: current assignees, contact, etc.
Change Status - Parent Contact	Select type: any workflow (ex. Repairs) Change status to: (any workflow status)
Change Status - Parent Job	Select type: any workflow (ex. Repairs) Change status to: (any workflow status)
Webhook	Webhook URL

= or ≠ means “is equal to” or “is not equal to”

Example

Notification when an Invoice has been fully paid:

1. Create a new automation that uses an event based trigger type.
2. Set the trigger to “When an Invoice is Modified”.
3. Add the Condition “If Status is equal to Closed”.
4. Add an action that creates a task to notify you that an invoice has been fully paid.

With this automation, the moment an invoice is paid, the status changes to closed and sends a task alerting you.

Work Order Automations

	Available conditions that trigger an automation			Available actions when conditions are met	
	Condition	Logic	Options	Action	Options
Event Based (immediate)	Type	= or ≠	All work order workflows (ex. roof, gutter)	Create Task	Set task: task, phone call, meeting, etc. Set task start date and priority Assign to: current assignees, contact, etc.
	Status	= or ≠	All work order statuses (ex. in progress)	Send Email	Select email template Set recipients: current assignees, contact, etc.
	Sales Rep	= or ≠	Any company Sales Rep	Change Status - Parent Contact	Select type: any workflow (ex. Repairs) Change status to: (any workflow status)
	Start Date or End Date	Occurs, Before, After	Today, yesterday, this week, last week, last month, this year, last year, tomorrow and more	Change Status - Parent Job	Select type: any workflow (ex. Repairs) Change status to: (any workflow status)
	Custom Fields*			Change WO Status (Time based only)	Select Type: any workorder workflow (ex. Roofing, Fencing, Siding, etc)
Time Based (occurs at set time before or after event)	Set Date	Before/ After	Date created, date updated, end date & time, start date & time	Webhook	Webhook URL
	Type	= or ≠	All work order workflows (ex. roof, gutter)		
	Status	= or ≠	All work order statuses (ex. in progress)		
	Sales Rep	= or ≠	Any company Sales Rep		
	Assigned to	= or ≠	Any team member		
	Start Date or End Date	Occurs, Before, After	Today, yesterday, this week, last week, last month, this year, last year, tomorrow and more		
	Custom Fields*				

= or ≠ means "is equal to" or "is not equal to"

*See Custom Field Conditions for customizable WO conditions

Example

Change job/contact status when a work order is completed:

1. Create a new automation that uses an event based trigger type.
2. Set the trigger to "When a Work Order is Modified".
3. Add the condition "If Status is equal to Completed".
4. Add an action that Changes to Job or Contact status to "Final Walk Around".

With this automation, when the work order is set to compeleted, the job/contact status will move to final walk around to initiate job close out.

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Material Order Automations

	Available conditions that trigger an automation			Available actions when conditions are met	
	Condition	Logic	Options	Action	Options
Event Based (immediate)	Sales Rep	= or ≠	Any company Sales Rep	Create Task	Set task: task, phone call, meeting, etc. Set task start date and priority Assign to: current assignees, contact, etc.
	Date	Occurs, Before, After	Today, yesterday, this week, last week, last month, this year, last year, tomorrow and more	Send Email	Select email template Set recipients: current assignees, contact, etc.
Time Based (occurs at set time before or after event)	Set Date	Before/ After	Date created, date material order, date status change, start date & time	Change Status - Parent Contact	Select type: any workflow (ex. Repairs) Change status to: (any workflow status)
	Sales Rep	= or ≠	Any company Sales Rep	Change Status - Parent Job	Select type: any workflow (ex. Repairs) Change status to: (any workflow status)
	Assigned to	= or ≠	Any team member	Webhook	Webhook URL
	Date	Occurs, Before, After	Today, yesterday, this week, last week, last month, this year, last year, tomorrow and more		

= or ≠ means "is equal to" or "is not equal to"

Example

Inform team members when a material order is created:
1. Create a new automation that uses an event based trigger type.
2. Set the trigger to "When a Material Order is Created".
3. Add the condition "If Date Occurs Today".
4. Add an action that sends an email to your crew notifying them that a material order has been created.

With this automation, when a material order is created, an email is sent to your crew to inform them materials have been ordered.

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Activity Automations

	Available conditions that trigger an automation			Available actions when conditions are met	
	Condition	**Logic**	**Options**	**Action**	**Options**
Event Based (immediate)	Type	= or ≠	Note, phone call, email, meeting notes, any custom note type	Create Task	Set task: task, phone call, meeting, etc. Set task start date and priority Assign to: current assignees, contact, etc.
	Note	Contains, not contains	Preset items, such as invoice created Any text that is entered	Send Email	Select email template Set recipients: current assignees, contact, etc.
Time Based (occurs at set time before or after event)	Set Date	before, after	Date created, date updated	Change Status - Parent Contact	Select type: any workflow (ex. Repairs) Change status to: (any workflow status)
	Type	= or ≠	Note, phone call, email, meeting notes, any custom note type	Change Status - Parent Job	Select type: any workflow (ex. Repairs) Change status to: (any workflow status)
	Note	Contains, not contains	Preset items, such as invoice created, contacted deleted, job modified, and more	Change Status - Parent WO	Select type: Any work order workflow Change status to: (any WO workflow status)
				Webhook	Webhook URL

= or ≠ means “is equal to” or “is not equal to”

Example

Event based activity automations allow you to search and act on any text that is appears in a contact/job activity feed.

Notification when document is signed: (JobNimbus allows you to add electronic signatures to any document

1. Create a new automation that uses an event based trigger type.
2. Set the trigger to “When a Activity is Created”.
3. Add the Condition “If Note Contains (any) Document Fully Signed”.
4. Add an action that changes the job/contract status to “Schedule Job”.
5. Add an action that assigns a task to the team member responsible for scheduling.

With this automation, if you use your own contract, you automatically change the job status when you upload the signed contract.

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Payment Automations

	Available conditions that trigger an automation			Available actions when conditions are met	
	Condition	**Logic**	**Options**		
Event Based (immediate)	Created by	= or ≠	Any team member, WePay		
	Method	= or ≠	None, cash, credit card, check, money order, bank wire, finance		
	Payment Amount	=, ≠, <, >	Enter specific number	**Action**	**Options**
				Create Task	Set task: task, phone call, meeting, etc. Set task start date and priority Assign to: current assignees, contact, etc.
Time Based (occurs at set time before or after event)	Set Date	before, after	Date created, date payment, date updated	Send Email	Select email template Set recipients: current assignees, contact, etc.
	Created by	= or ≠	Any team member, Gloabl Payments, WePay	Webhook	Webhook URL
	Method	= or ≠	None, cash, credit card, check, money order, bank wire, finance		
	Payment Amount	=, ≠, <, >	Enter specific number		

= or ≠ means "is equal to" or "is not equal to"

Example

Notification when receiving a large payment:

1. Create a new automation that uses an event based trigger type.
2. Set the trigger to "When a Payment is Created".
3. Add the Condition "If Payment Amount is greater than 5000".
4. Add an action that creates an email to the office staff alerting them to a large payment.

With this automation, the moment a large payment is submitted the office staff receive an email alerting them to the payment.

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Attachment Automations

	Available conditions that trigger an automation	Available actions when conditions are met
Event Based (immediate)		
Time Based (occurs at set time before or after event)		

Event Based (immediate) — Conditions:

Condition	Logic	Options
Type	= or ≠	Document, photo, email attachment, work order, estimate, invoice, material order, credit memo, any custom attachment type

Time Based (occurs at set time before or after event) — Conditions:

Set Date	before, after	Date created, date updated
Type	= or ≠	Document, photo, email attachment, work order, estimate, invoice, material order, credit memo, any custom attachment type

= or ≠ means "is equal to" or "is not equal to"

Available actions when conditions are met

Action	Options
Create Task	Set task: task, phone call, meeting, etc. Set task start date and priority Assign to: current assignees, contact, etc.
Send Email	Select email template Set recipients: current assignees, contact, etc.
Change Status - Parent Contact	Select type: any workflow (ex. Repairs) Change status to: (any workflow status)
Change Status - Parent Job	Select type: any workflow (ex. Repairs) Change status to: (any workflow status)
Webhook	Webhook URL

Example

Notification when uploading a signed contract produced outside of JobNimbus:

1. Create a custom attachment type named "Signed Contract" in settings. (attachement categories)
2. Create a new automation that uses an event based trigger type.
3. Set the trigger to "When a Attachment is Created".
4. Add the Condition "If Type is equal to Signed Contract".
5. Add an action that changes the job/contract status to "Schedule Job".

With this automation, if you use your own contract, you can automatically change the job status when you upload the signed contract.

JobNimbus

Custom Field Conditions

Available Custom Fields

Custom Fields are available for Contacts, Jobs, and Work Orders. These fields allow for additional automation conditions based on data that applies specifically to how you set up your business processes. Here are the available options:

Type:	Logic:	Conditions:	Example:
Boolean	= or ≠	True or False	Check box if the job is an insurance job, which sends automations to a different team.
Date	occurs, before, after	Today, yesterday, this week, next week, mext month, etc	Create a date field for inspection due, this would send automations to your inspection team.
Decimal	=, ≠, >, <, between	Any number	This can be treated as currency. Create a field for allowable insurance amount.
Number	=, ≠, >, <, between	Any whole number	
Text	= or ≠	Specific text	
Option List	= or ≠	Any option on the custom list	Select options for estimates, such as Roof only, Roof and solar, roof and gutter, etc.

Example

Upselling customers to better packages: .

1. Create a custom option list for your different job options. (List: Work Type Options:Cheap, Average, Expensive)
2. Create an event based automation for “When a Contact is Created.
3. Add the Condition “If Work Type is equal to Cheap”.
4. Add an action that sends the contact an email detailing the benefits and long term savings of higher cost options.

With this automation, contacts electing for cheaper systems can receive automated email templates informing them on different options.

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