Job Kick Off

Start jobs quickly and easily with multiple task creation.

Scenario

A lead you have been working with for some time has finally signed an estimate and is ready to go. The only problem, they never told you they signed. By the time you realized this, they were frustrated and questioned if you're the right one for the job.
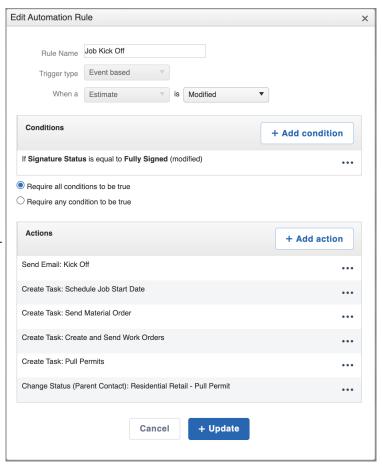
With JobNimbus estimate automations, get the job started the right way with instant notifications and assignments when a job is approved.

Setup

In the "Automation" tab within settings:

1. Click "+ Add rule" and create a name.

2. Select "Event based" as the trigger type.

3. Select "When a Estimate is Modified".

4. Click "+ Add Condition" and select "If Signature Status is equal to Fully Signed".

5. Click "+ Add action" and select Send Email, selecting your "Kick Off" template, and send to "All Related Contacts".

6. Add actions to create tasks for job scheduling, material orders, work orders, and pull permits. Assign them to the correct team members.

7. Add action to change the status to "Pull Permit".

This automation can include a large variety of actions to get your jobs moving as soon as you have a signed estimate.

Edit Automation Rule   ✕

Rule Name | Job Kick Off

Trigger type | Event based ▾

When a | Estimate ▾ | is | Modified ▾

Conditions   + Add condition

If **Signature Status** is equal to **Fully Signed** (modified)   •••

◉ Require all conditions to be true
◯ Require any condition to be true

Actions   + Add action

Send Email: Kick Off   •••

Create Task: Schedule Job Start Date   •••

Create Task: Send Material Order   •••

Create Task: Create and Send Work Orders   •••

Create Task: Pull Permits   •••

Change Status (Parent Contact): Residential Retail - Pull Permit   •••

Cancel   + Update

Benefits

- Automatically thank customers and let them know what to expect as you start their job.
- Alert all team members that a job is approved.
- Create tasks for each of your teams to make sure nothing is overlooked.
- Automatically change the Job or Contact status to move seamlessly through your workflow.
- Create a uniform process that is applied to all jobs so there are never any surprises.
- Provide customers with a very professional and smooth experience.

JobNimbus