Stop Stalled Jobs

Be informed when jobs have not progressed within a set timeframe.

Scenario

You sent out an estimate and never heard back. When you remembered to check in a week later, you were informed they forgot to check your estimate and went with another company.
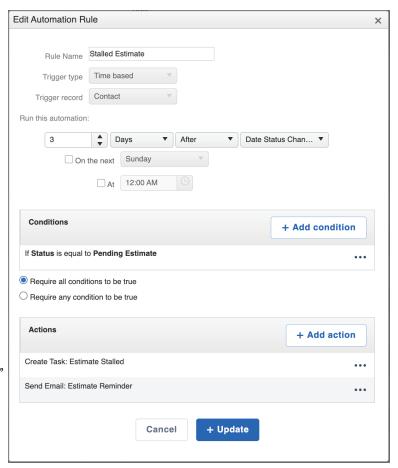
Using JobNimbus, you can easily create automations to notify you when a job or contact is stuck in a certain status. Whether the job is taking too long, customers are dragging their feet on signing, or your finance team hasn't sent an invoice, you can be notified anytime there is a problem with your process.

Setup

In the Automation tab within settings:

1. Click "+ Add rule" and create a name.
2. Select "Time based" as the trigger type.
3. Select "Contact" or "Job" as the trigger record.
4. Run this automation: "3 Days After Date Status Changed".
5. Click "+ Add Condition" and select "If Status is equal to Pending Estimate".
6. Click "+ Add action" and select Create Task.
7. Name the task "Estimate Stalled", add a description, and assign to the Sales Rep.
8. Click "+ Add action" and select Send Email, selecting your "Thank You + Review" template, and send to "All Related Contacts".
8. Click Save on all prompts.

This automation can be adapted to many situations, such as awaiting materials, job clean up, job in process, and more.

Edit Automation Rule ✕

Rule Name | Stalled Estimate

Trigger type | Time based ▾

Trigger record | Contact ▾

Run this automation:

| 3 ▴▾ | Days ▾ | After ▾ | Date Status Chan... ▾ |

☐ On the next | Sunday ▾

☐ At | 12:00 AM ⏱

Conditions | + Add condition

If **Status** is equal to **Pending Estimate** ...

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

Actions | + Add action

Create Task: Estimate Stalled ...

Send Email: Estimate Reminder ...

Cancel | + Update

Benefits

- Earn more business by quickly following up with stalled quotes and providing better service.
- Identify problems in your workflow and make adjustments as needed.
- Keep tabs on crews or subcontractors that are not adequately performing.
- Close deals faster.
- Modify this automation to track customers that are delayed in any status.

JobNimbus