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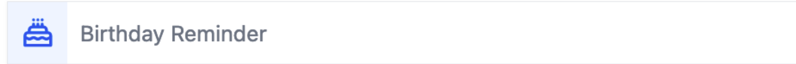
Contact Triggers

★ Birthday Reminder



If you store your contact's birthdays in MyMFG+, you can use this trigger to activate a workflow.

Filters:
After no. of days - Trigger the workflow X number of days after a contact's birthday.
Before no. of days - Trigger the workflow X number of days before a contact's birthday.
Day is - Trigger the workflow on a specific day. Good for setting a birthday message to send on a specific date (when used in tandem with a second ***Month Is*** filter).
Month is - Trigger the workflow on a specific month. Good for sending bulk birthday emails on a specific date (using a second ***Day is*** filter) to all contacts with a birthday in that month.

★ Contact Changed

Triggered by the changing of any contact field, standard or custom. If no filters are selected, any field changed at all will activate this trigger.

Filters:
Any standard or custom field - Triggered apon the changing of the chosen field. Can be if the field is changed at all, or changed to a chosen variable.
Assigned user - Triggered when the owner/assigned user is changed.
DND - Triggered if a DND checkbox is changed, or set to enabled/disabled for all channels.
Tags - Triggered if a specified tag is added or removed.

★ Contact Created

Triggered by the creation of a new contact.

Filters:
Any Standard or Custom Field - Only triggers the workflow if the new contact has a specified variable in the selected field.
Has tag - Only triggers the workflow if the new contact has a specified tag.

★ Contact DND

Triggered by a contact's DND status changing on all channels or a specified channel.

Filters:
DND flag is - Only trigger the workflow if the DND is changed in a specific way. The options are:
- Disabled DND for all channels
- Disabled DND for specific channels - add a second filter to choose which channel
- Enabled DND for all channels
- Enabled DND for specific channels - add a second filter to choose which channel

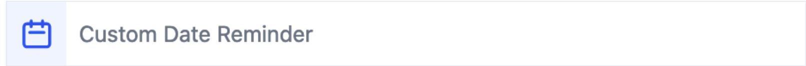
★ Contact Tag

Triggered by the changing of tags. If no filters are selected, any tag added or removed activate this trigger.

Filters:
Tag added - Triggered if a specified tag is added.
Tag removed - Triggered if a specified tag is removed.

Contact Triggers

★ Custom Date Reminder



Triggered on a set date in a custom field. Good for appointment reminders.

Filters:
Custom date field - You must add this filter, and choose the custom date field you wish to use.
Has Tag - Only activates the trigger if the contact has the specified tag.
After no. of days - Trigger the workflow X number of days after the date.
Before no. of days - Trigger the workflow X number of days before the date.
Day is - Trigger the workflow on a specific day. Good for setting a message to send on a specific date (when used in tandem with a second ***Month Is*** filter).
Month is - Trigger the workflow on a specific month. Good for sending a message on a specific date (using a second ***Day is*** filter).

★ Note Added

Triggered when a note is added to the contact.

Filters:
Has tag - Only triggers the workflow if the contact has a specified tag.
Doesn't have tag - Only triggers the workflow if the contact lacks a specified tag.

★ Note Changed

Triggered when a note on a contact is edited.

Filters:
Has tag - Only triggers the workflow if the contact has a specified tag.
Doesn't have tag - Only triggers the workflow if the contact lacks a specified tag.

★ Task Added

Triggered when a task is added to the contact.

Filters:
Has tag - Only triggers the workflow if the contact has a specified tag.
Doesn't have tag - Only triggers the workflow if the contact lacks a specified tag.
Assigned user - Only triggers the workflow if the contact is assigned to a specified user.

★ Task Reminder

Trigger a workflow based on a task that has been created previously.

Filters:
After no. of days - Trigger the workflow X number of days after the task.
Before no. of days - Trigger the workflow X number of days before the task.

★ Task Completed

Triggered by a task being marked as complete.

Filters:
Assigned user - Only triggers the workflow if the task/contact is assigned to a specified user.

Event Triggers

★ Inbound Webhook

Trigger a workflow based on a task that has been created previously.

Filters:
After no. of days - Trigger the workflow X number of days after the task.
Before no. of days - Trigger the workflow X number of days before the task.

★ Call Status

Triggered by a call being made or received.

Filters:
Call Direction - Incoming only triggers the workflow if a call is coming in, Outgoing only triggers the workflow if a call is made out.
Call Status - Gives the options Busy, Canceled, Completed, No-Answer, and Voicemail. If an option is selected, the workflow only triggers if the call's status matches.
In Workflow - Only triggers the workflow if the contact who the call was to or from is already in a specified workflow.

★ Email Events

Triggered by an email sent through Plus having an event occur.

Filters:
Event - Gives the options Bounced - mailgun only, Clicked, Complained (SPAM), Opened, and Unsubscribed. If an option is selected, the workflow only triggers if the email's event matches.
In Workflow - Only triggers the workflow if the contact who interacted with the email is already in a specified workflow.

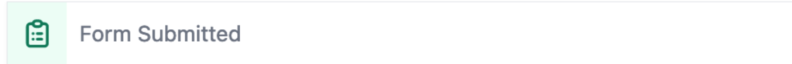
★ Customer Replied

Triggered by a contact replying to a message sent through Plus.

Filters:
Contains phrase - Only triggers the workflow if the reply contains the selected phrase.
Doesn't have tag - Only triggers the workflow if the contact that replied doesn't have the selected tag.
Exact match phrase - Only triggers the workflow if the reply exactly matches the selected phrase.
Has Tag - Only triggers the workflow if the contact that replied has the selected tag.
Intent Type - Gives the options Positive/Yes and Negative/No. If an option is selected, the workflow only triggers if the tone the contact replied with matches.
Replied to Workflow - Only triggers the workflow if the contact who replied did so within a specified workflow.
Reply channel - Gives the options Call, Chat Widget, Email, Facebook Messenger, GMB Messaging, Instagram DM, Live Chat, SMS, and WhatsApp. If an option is selected, the workflow only triggers if the place the contact replied matches.

Event Triggers

★ Form Submitted



Triggered by the submission of a form.

Filters:
Form is - Only triggers the workflow if the submitted form is the one specified.

★ Survey Submitted

Triggered by the submission of a survey.

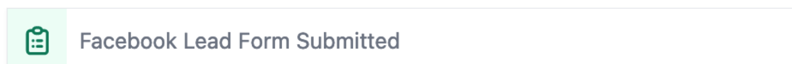
Filters:
Disqualified - Gives the options is false and is true. Depending on the selected optinon, the workflow only triggers if the contact that submitted the survey is disqualified (true) or not (false).
Survey is - Only triggers the workflow if the submitted survey is the one specified.

★ Trigger Link Clicked

Runs the workflow when a trigger link is clicked.

Filters:
Trigger link - Only triggers the workflow if the specified trigger link is clicked.

★ Facebook Lead Form Submitted



Triggered by the submission of a Facebook form.

Filters:
In form - Only triggers the workflow if the specified form is submitted.

★ TikTok Form Submitted

Triggered by the submission of a TikTok form.

Filters:
In form - Only triggers the workflow if the specified form is submitted.

★ Video Tracking

Triggered by a contact watching a specific percentage of a video.

Filters:
Funnel - Only triggers the workflow if the video is in the specified funnel(s) (is any of) or not on the specified funnel(s) (is none of).
Video - Only triggers the workflow if the specified video (is any of) or not the specified videos (is none of) is watched.
Video Duration % - Only triggers the workflow if the specified video is watched to the specified amount. Can be set to Equals to, Greater than, Greater than or Equal to, Is empty, Is not empty, Is not equal to, Less than, or Less than or equal to.

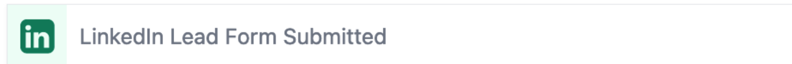
Event Triggers

★ Twilio Validation Error

Runs based on the Twilio Lookup response before sending an SMS or making a call. Number Validation has to be enabled in Agency Twilio Settings.

Filters:
Error is - Only triggers the workflow if the error matches the selection.

★ LinkedIn Lead Form Submitted



Triggered by the submission of a LinkedIn form.

Filters:
Page - Gives the options Is, Is empty, Is not, and Is not empty. Depending on the selected option, the workflow only triggers if the submitted form's page matches the selection.

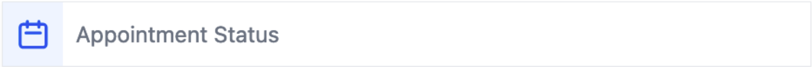
★ Funnel/Website PageView

Triggered by the viewing of a page.

Filters:
Funnel/Website - Gives the options Is, Is empty, Is not, and Is not empty. Is and Is not allow specification of a funnel/website. Depending on the selected option, the workflow only triggers if the funnel/website matches the selection.

Appointment Triggers

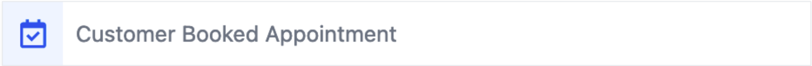
★ Appointment Status



Triggered by the changing of an appointment's status.

Filters:
Event Type - Gives the options Any, Normal and Recuring. Only triggers the workflow if the appointment type matches.
Appointment status is - Gives the options new, confirmed, canceled, Showed, No-show, and invalid. Only triggers the workflow if the appointment status matches the selection.
Has Tag - Only triggers the workflow if the contact connected to the appointment has the selected tag.
In calendar - Only triggers the workflow if the appointment is in the selected calendar.
In calendar Group - Only triggers the workflow if the appointment is in the selected calendar group.
Modified By - Gives the options API, Customer, and User. Only triggers the workflow if the appointment was modified by the selected editor.
Only For Grouped Calendars - Only triggers the workflow if the appointment is only for group calendars when yes is selected, and only triggers the workflow if an appointment is available for regular calendars as well if no is selected.

★ Customer Booked Appointment



Triggered by the creation of an appointment by a customer.

Filters:
Has Tag - Only triggers the workflow if the contact connected to the appointment has the selected tag.
In calendar - Only triggers the workflow if the appointment is in the selected calendar.
In calendar Group - Only triggers the workflow if the appointment is in the selected calendar group.

Opportunity Triggers

★ Opportunity Status Changed

Triggered by the changing of an opportunity's status.

Filters:

Assigned to - Only triggers the workflow if the contact connected to the opportunity is assigned to the selected user.
Has Tag - Only triggers the workflow if the contact connected to the opportunity has the selected tag.
In pipeline - Only triggers the workflow if the contact is in the selected pipeline.
Lead value - Only triggers the workflow if the value of the opportunity's value is either Equal to, Greater than, Greater than or Equal to, Is not equal to, Less than, or Less then or equal to the specified amount.
Lost Reason - Only triggers the workflow if the contact moved to the lost status for the specified reason.
Moved from status - Only triggers the workflow if the opportunity is moved from the specified status.
Moved to status - Only triggers the workflow if the opportunity is moved to the specified status.

★ Opportunity Created

Triggered by the creation of an opportunity.

Filters:

Assigned to - Only triggers the workflow if the contact connected to the opportunity is assigned to the selected user.
Has Tag - Only triggers the workflow if the contact connected to the opportunity has the selected tag.
In pipeline - Only triggers the workflow if the contact is in the selected pipeline.
Lead value - Only triggers the workflow if the value of the opportunity's value is either Equal to, Greater than, Greater than or Equal to, Is not equal to, Less than, or Less then or equal to the specified amount.
Lost Reason - Only triggers the workflow if the contact moved to the lost status for the specified reason.
Status - Only triggers the workflow if the opportunity is or is not the specified status.

★ Opportunity Changed

Triggered by the changing of an opportunity.

Filters:

Assigned to - Only triggers the workflow if the contact connected to the opportunity is assigned to the selected user.
Has Tag - Only triggers the workflow if the contact connected to the opportunity has the selected tag.
In pipeline - Only triggers the workflow if the contact is in the selected pipeline.
Lead value - Only triggers the workflow if the value of the opportunity's value is either Equal to, Greater than, Greater than or Equal to, Is not equal to, Less than, or Less then or equal to the specified amount.
Lost Reason - Only triggers the workflow if the contact moved to the lost status for the specified reason.
Status - Only triggers the workflow if the opportunity is or is not the specified status.

Opportunity Triggers

★ Pipeline Stage Change

Triggered when opportunities change stages in a pipeline.

Filters:

Assigned to - Only triggers the workflow if the contact connected to the opportunity is assigned to the selected user.
Has Tag - Only triggers the workflow if the contact connected to the opportunity has the selected tag.
In pipeline - Only triggers the workflow if the contact is in the selected pipeline.
Lead value - Only triggers the workflow if the value of the opportunity's value is either Equal to, Greater than, Greater than or Equal to, Is not equal to, Less than, or Less then or equal to the specified amount.
Lost Reason - Only triggers the workflow if the contact moved to the lost status for the specified reason.
Status - Only triggers the workflow if the opportunity is or is not the specified status.

★ Stale Opportunity

Triggered when opportunities reach a certain age.

Filters:

Assigned to - Only triggers the workflow if the contact connected to the opportunity is assigned to the selected user.
Doesn't Have Tag - Only triggers the workflow if the contact connected to the opportunity doesn't have the selected tag.
Duration in days - Set the number of days that the opportunity has to be older that to trigger the workflow.
Has Tag - Only triggers the workflow if the contact connected to the opportunity has the selected tag.
In pipeline - Only triggers the workflow if the contact is in the selected pipeline.
Lead value - Only triggers the workflow if the value of the opportunity's value is either Equal to, Greater than, Greater than or Equal to, Is not equal to, Less than, or Less then or equal to the specified amount.
Lost Reason - Only triggers the workflow if the contact moved to the lost status for the specified reason.
Status - Only triggers the workflow if the opportunity is or is not the specified status.

Course Triggers

★ Category Started

Triggered when a category of a specific product starts.

Filters:
Product - Only trigger the workflow if the product is any of/none of the specified.

★ Category Completed

Triggered when a category of a specific product is completed.

Filters:
Product - Only trigger the workflow if the product is any of/none of the specified.

★ Lesson Started

Triggered when a contact starts the specified lesson.

Filters:
Product - Only trigger the workflow if the lesson is any of/none of the specified.

★ Lesson Completed

Triggered when a contact starts the specified lesson.

Filters:
Product - Only trigger the workflow if the lesson is any of/none of the specified.

★ New Signup

Triggered when a contact signs up for/subscribes to a course.

Filters:
Offer - Only trigger the workflow if the signup is the specified.

★ Offer Access Granted

Triggered when access to an offer is granted.

Filters:
Offer - Only trigger the workflow if the offer is the specified.

★ Offer Access Removed

Triggered when access to an offer is removed.

Filters:
Offer - Only trigger the workflow if the offer is the specified.

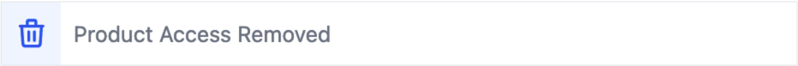
★ Product Access Granted

Triggered when access to an product is granted.

Filters:
Select Product - Only trigger the workflow if the product is the specified.

Course Triggers

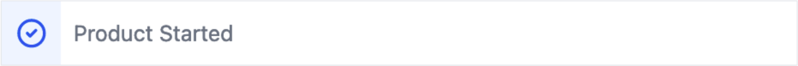
★ Product Access Removed



Triggered when access to an product is removed.

Filters:
Select Product - Only trigger the workflow if the product is the specified.

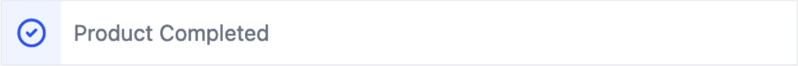
★ Product Started



Triggered when a specific product starts.

Filters:
Product - Only trigger the workflow if the product is any of/none of the specified.

★ Product Completed



Triggered when a specific product is completed.

Filters:
Product - Only trigger the workflow if the product is any of/none of the specified.

★ User Login

Triggered when a user logs into a course.

Filters:
No Filters - Only custom fields available.

Community Triggers

★ Group Access Granted

Group Access Granted

Triggered when community access is granted.

Filters:
Group - Only trigger the workflow when access is granted to the specified group.

★ Group Access Revoked

Group Access Revoked

Triggered when community access is revoked.

Filters:
Group - Only trigger the workflow when access is revoked to the specified group.

Facebook/Instagram Events

★ Facebook Comment(s) On A Post

Facebook - Comment(s) On A Post Beta

Triggered when a comment is left on a Facebook post.

Filters:
Page is - Only trigger the workflow when a comment is left on the specified page.
Contains phrase - Only trigger the workflow when a comment contains the phrase(s) specified.
Exact match - Only trigger the workflow when a comment matches the exact phrase(s) specified.

★ Instagram Comment(s) On A Post

Instagram - Comment(s) On A Post Beta

Triggered when a comment is left on a Instagram post.

Filters:
Page is - Only trigger the workflow when a comment is left on the specified account.
Contains phrase - Only trigger the workflow when a comment contains the phrase(s) specified.
Exact match - Only trigger the workflow when a comment matches the exact phrase(s) specified.

Certificates

★ Certificates Issued

Certificates Issued

Triggered when a certificate is issued.

Filters:
Templates - Gives the options Is, Is empty, Is not, and Is not empty. Is and Is not allow specification of a template. Depending on the selected option, the workflow only triggers if the template matches the selection.

Contact Actions

★ Create Contact

Create Contact

Automatically creates a new contact. If a contact already exists, it will be updated. This action only works with contactless execution methods like "Inbound webhook"

★ Find Contact

Find Contact

Find a Contact with the matching values

★ Update Contact Field

Update Contact Field

Update a field in the contact record

★ Add Contact Tag

Add Contact Tag

Adds specified tags to the contact

★ Remove Contact Tag

Remove Contact Tag

Removes specified tags from the contact

★ Assign To User

Assign To User

Assigns the contact to a user. Specify the user or add multiple for round-robin assignment

★ Remove Assigned User

Remove Assigned User

Removes any assigned users leaving the contact unasigned

★ Edit Conversation

Edit Conversation

Mark the Conversation as Read/Unread and Archive/Unarchive it

★ Enable/Disable DND

Enable/Disable DND

Activate do-not-disturb for the contact

★ Add To Notes

Add To Notes

Adds a Note to the Contact Record

★ Add Task

Add Task

Create a new Task with a defined Due Date to be Assigned to a Specific User

★ Delete Contact

Delete Contact

This action permanently deletes the contact from this account and all workflows.

★ Modify Contact Engagement Score

Modify Contact Engagement Score

Use this action to modify a contact's engagement score based on triggers

Contact Actions

★ Add Contact Followers

Add Contact Followers

Adds the specified users as followers to the contact.

★ Remove Contact Followers

Remove Contact Followers

Removes all or the specified users as followers from the contact.

Communication Actions

★ Send Email

Send Email

Send an email to the contact

★ Send SMS

Send SMS

Send a text message to the contact

★ Call

Call

If the contact has been assigned to a user, this event will call the user and play the whisper message. If the contact is unassigned, this event will call the number listed in Settings > Company tab > Company Phone field and play the whisper message. If the person who answers the call presses any number key during the call, we will dial the Contact and if they answer, we will bridge the call.

★ Voicemail

Voicemail

Pushes a pre-recorded voicemail file to the contact

★ Manual Action To SMS

Manual Action To SMS

Creates a Manual Action for someone to manually send an SMS to the contact (Manual Actions can be found in Conversations > Manual Actions)

★ Manual Action To Call

Manual Action To Call

Creates a Manual Action for someone to manually call the contact (Manual Actions can be found in Conversations > Manual Actions)

★ Internal Notification

Send Internal Notification

Send a notification to someone other than the contact such as yourself or the assigned user.

★ Review Request

Send Review Request

Send a Review Request to the contact. Configure the review request message in the Reputation Settings.

Internal Tool Actions

★ If / Else

If / Else

Fork the contact's journey through this workflow based on conditions

★ Wait

Wait

Holds a contact for a specific time, until a condition exists, or until the contact replies

★ Goal Event

Goal Event

When a contact meets the conditions of a Goal Event, they'll jump straight to the Goal (regardless of where they were in the workflow) and continue from the Goal Event

★ Split

Split

Fork the contact's journey through this workflow based on random chance. Customize with percentages.

★ Update Custom Value

Update Custom Value

Update a Custom Value

★ Go To

Go To

Skip your contacts to other branch or step in the workflow.

★ Date/Time Formatter

Date/Time Formatter

Format and Compare date fields.

★ Number Formatter

123 Number Formatter

Format and generate Numeric fields

★ Math Operation

Math Operation

Add Math Operations

★ Set Event Start Date

Set Event Start Date

Use this event to set the Event Start Date to a specific day, date, and/or time, which enables you to use Wait events that hold contacts in relation to the day/date/time that you set.

★ Add To Workflow

Add To Workflow

Adds the contact to another workflow

★ Remove From Workflow

Remove From Workflow

Removes the contact from a specific workflow

Internal Tool Actions

★ Remove From All Workflows

Remove From All Workflows

Removes contact from all workflows

★ Drip

Drip

Proceed to next step in batches, at regular interval.

★ Text Formatter

Text Formatter

Format your text data to capitalize, find & replace, trim and much more

Send Data Actions

★ Webhook

Webhook

Fire a webhook containing the contact's details

★ Custom Webhook

Custom Webhook

Fire a fully customizable webhook containing any desired details

★ Google Sheets

Google Sheets

Send data to Google Sheets

Appointment Actions

★ Update Appointment Status

Update Appointment Status

This action changes the status of an Appointment. If the Contact was added to this Workflow via an appointment-related Trigger ("Appointment" or "Customer Book Appointment"), the status of the Appointment that fired the Trigger will be updated. If the Contact was added to this Workflow via another method, the status of the most recent Appointment that the Contact is carrying will be updated

★ Generate One Time Booking Link

Generate One Time Booking Link

Generate one time booking link for a calendar

Opportunity Actions

★ Create/Update Opportunity

Create/Update Opportunity

Creates or updates an Opportunity within the Pipeline that you select

★ Remove Opportunity

Remove Opportunity

Removes an opportunity associated with the contact