

FREE GUIDE · FOR SERVICEM8 & TRADIFY USERS

# The **Secret** Automations **Hiding** In Your Software

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The follow-up, reminder, and reply features already sitting inside ServiceM8 and Tradify — most plumbers and electricians never switch them on.

## BEFORE YOU START

# You're already paying for this.

You just haven't been shown where the switch is.

Most plumbers and electricians run ServiceM8 or Tradify every day for scheduling, quoting, and invoicing — and never touch the automation features already built into the plan they're paying for.

That's not a knock on you. Nobody hands you a "here's what you're not using" tour when you sign up. You learn the parts you need to get through the day, and the rest sits there.

**What this guide is:** a straight walkthrough of the native automations already inside ServiceM8 and Tradify — where to find them, what they do, and exactly how to turn them on. No new software. No subscription. Nothing to buy.

We've also included:

## 1 The gap neither platform covers

What happens before a quote or job exists — the missed call, the Facebook message, the first enquiry — and why that part still needs something else watching it.

## 2 A ready-to-use follow-up script pack

Three message templates (Day 1, 3, and 7) you can copy today, with or without any automation at all.

## 3 A one-page audit checklist

Tick off what you've already got switched on, and what's been sitting there unused.

This isn't a pitch for Fluency. Everything in the next few pages works whether you ever talk to us again or not. If it saves you a Sunday night of admin, it's done its job.

## SERVICEM8

## Turn on Triggers.

The feature that automates customer messages based on job status — most accounts have it switched off by default.

**What it does:** ServiceM8's Triggers feature watches for a change — a job status update, a badge, a queue move — and automatically fires an action off the back of it. That action can be a text, an email, or an internal notification. No manual step required once it's set up.

### 1 Find it

In ServiceM8, go to Settings → Automation → Triggers. If you've never opened this menu before, that's normal — most owners haven't.

### 2 Set your first trigger: quote follow-up

Create a trigger on "Quote Sent" status. Set the delay to 3 days. Set the action to send an SMS or email if the quote hasn't been actioned (accepted, declined, or replied to).

### 3 Write the message once

Use the Day 3 script from the template pack on page 6. Paste it into the trigger's message field. It'll send itself from here on.

### 4 Add a second trigger for job status

Job marked "Complete" → automatic message asking for a review. This is the single highest-leverage trigger most accounts never set up.

Once this is on, the only manual step left is marking the quote as sent — something you already do. Everything after that runs on its own.

**Worth knowing:** ServiceM8's native automation is rules-based — it fires the same message every time, and it can't hold a two-way conversation if a customer replies with a question instead of a yes or no. It's excellent at the reminder. It stops there.

## TRADIFY

# Three reminders you're not using.

Payment chasing, repeat-service bookings, and job confirmations — all native, all switchable.

## 1 Payment reminders

Once an invoice is sent, Tradify can automatically fire an SMS or email reminder as the due date approaches, and again if it goes overdue. Turn this on under Settings → Invoicing → Payment Reminders. Set two triggers: 3 days before due, and 3 days after overdue.

## 2 Service reminders (Plus plan)

If you're on Tradify Plus, Service Reminders automatically trigger a follow-up job based on the last service date — an annual service, a quarterly check, whatever your recurring work looks like. Set it once per customer type and it rebooks itself without you lifting a finger.

## 3 Scheduling confirmations

When a job is booked or rebooked, Tradify's calendar can automatically send the customer a confirmation or reminder. Turn this on under Settings → Scheduling → Notifications, so customers stop calling to ask "are we still on for Thursday."

**If you're not on Plus:** Service Reminders is a paid-tier feature. Payment reminders and scheduling confirmations are available on lower tiers — start there, it's still a meaningful chunk of your admin gone.

None of this requires switching software or learning a new system. It's the plan you're already on, doing more of the work you're already paying it to do.

## WHAT NEITHER PLATFORM COVERS

# The part before the job exists.

Everything on the last two pages starts after a quote or job is already in the system. That's the gap.

ServiceM8 and Tradify are excellent at managing work you've already won. Triggers, reminders, service scheduling — all of it fires off something that already exists as a quote, job, or invoice.

**None of it touches the part before that.** The missed call while you're up a ladder. The Facebook message that sits for two days. The enquiry that never made it into either platform because nobody had a moment to type it in.

**Here's why that matters:** a customer with an emergency doesn't wait around for you to open your job software. They call the next name on the list. By the time a lead becomes a quote inside ServiceM8 or Tradify, the automations in this guide are already too late to save the ones that never made it that far.

This isn't a flaw in either platform — it's just outside what they were built to do. Job management software manages jobs. It was never designed to catch the moment before a job exists.

**That's the layer we build at Fluency — sitting on top of ServiceM8 or Tradify, not replacing them, catching what happens before the lead ever reaches the software you already trust.**

Curious what that gap is actually costing you? The free 2-minute Revenue Check on the last page shows you the number.

## BONUS RESOURCE

# The quote follow-up script pack.

Paste these straight into your Trigger or Reminder message field — or send them manually if you're not automating yet.

**DAY 1****SMS**

*"Hi [Name], it's [Your Name] from [Business]. Just sent through your quote for [job type] — let me know if anything needs explaining or if you'd like to lock in a date. Cheers!"*

**DAY 3****SMS**

*"Hey [Name], just following up on the quote for [job type] — still keen to help out if you're ready. A few spots are opening up next week if you want to lock one in."*

**DAY 7****SMS**

*"Hi [Name], last check-in on the [job type] quote — happy to help whenever you're ready, no expiry on my end. Just flick me a message."*

Keep the tone exactly like this — casual, no corporate polish, sender's name attached. That's what keeps it from reading like spam.

TWO-MINUTE AUDIT

# What's actually switched on?

Tick what you've already got running. Anything unticked is sitting there unused right now.

| Automation                          | Platform                         | On?                      |
|-------------------------------------|----------------------------------|--------------------------|
| Quote follow-up reminder (Trigger)  | ServiceM8                        | <input type="checkbox"/> |
| Job-complete review request         | ServiceM8                        | <input type="checkbox"/> |
| Payment reminder (pre-due)          | Tradify                          | <input type="checkbox"/> |
| Payment reminder (overdue)          | Tradify                          | <input type="checkbox"/> |
| Service reminder (repeat customers) | Tradify Plus                     | <input type="checkbox"/> |
| Scheduling confirmation on booking  | Tradify                          | <input type="checkbox"/> |
| After-hours / missed-call follow-up | Neither — outside both platforms | <input type="checkbox"/> |
| Facebook / DM reply coverage        | Neither — outside both platforms | <input type="checkbox"/> |

**If you ticked the top 6 and left the bottom 2 blank** — that's normal, and it's exactly the gap this whole guide is about. The bottom two are what a speed-to-lead layer like Fluency's Mac is built to cover.

You don't need new software.  
You need **what you've already got,**  
**switched on** — and something  
watching the part it can't reach.

**Free 2-Minute Revenue Check → [scorecard.fluencytheagency.com](https://scorecard.fluencytheagency.com)**

**Fluency The Agency** — automation systems for plumbers & electricians

Try our live AI receptionist demo: +1 562 742 3456 (*US number — international call if dialling from Australia*)

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