

# Service appointment scheduling

Automates service appointment scheduling from customer request through confirmation, optimizing technician availability and reducing manual coordination. Increases service bay utilization and improves customer satisfaction through seamless booking experience.

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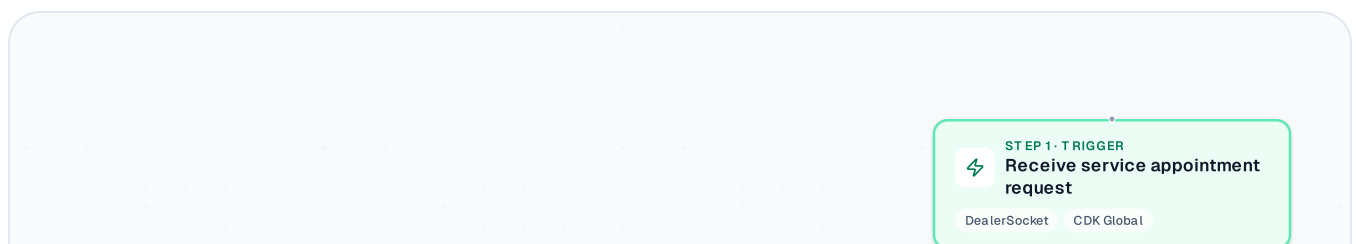
## WORKFLOW TRIGGER

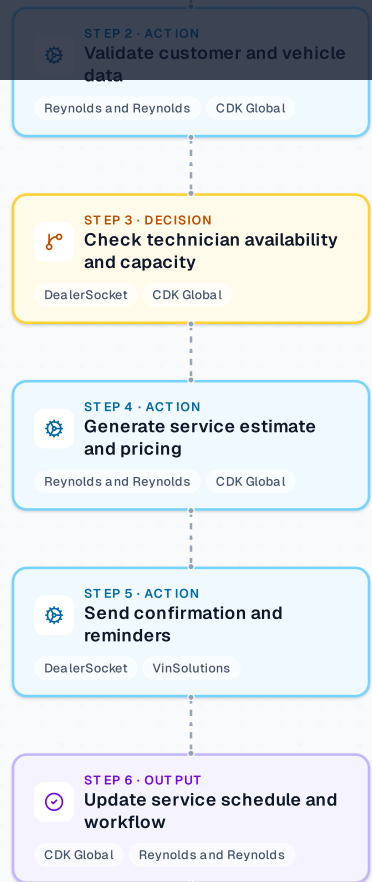


Customer submits service appointment request through dealership website, mobile app, or phone call

## Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





## Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

### Receive service appointment request

Customer initiates service booking by providing vehicle information, preferred dates, and service type needed. System captures all request details and customer contact information.

2

 ACTION

### Validate customer and vehicle data

System verifies customer identity, retrieves vehicle service history, and confirms warranty status. Enriches request with previous service records and recommended maintenance intervals.

Reynolds and Reynolds

CDK Global

3

 DECISION

### Check technician availability and capacity

System evaluates service bay availability, technician specializations, and estimated job duration against customer preferences. Routes to immediate booking or alternative time suggestions.

DealerSocket

CDK Global

4

 ACTION

### Generate service estimate and pricing

Automatically creates detailed service estimate including parts, labor, and time requirements. Applies any applicable warranties, promotions, or customer loyalty discounts.

Reynolds and Reynolds

CDK Global

5

 ACTION

### Send confirmation and reminders

## AI Business OS

Delivers appointment confirmation with service details, estimated completion time, and cost breakdown to customer. Schedules automated reminder notifications for appointment day.

DealerSocket

VinSolutions

6

OUT PUT

### Update service schedule and workflow

Confirms appointment in dealership management system and notifies service advisors. Creates work orders and allocates necessary parts inventory for scheduled service date.

CDK Global

Reynolds and Reynolds



### Outputs

- Confirmed service appointment with allocated technician
- Detailed service estimate sent to customer
- Work order created in service management system



### Key Metrics

- Service bay utilization rate

- Customer appointment confirmation rate

## AI Business OS

Average time from request to scheduled appointment



### Tools & Integrations

- DealerSocket
- CDK Global
- Reynolds and Reynolds
- VinSolutions

## AI Business OS

Actionable AI implementation strategies for business leaders ready to transform their operations.

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