

# Automated client scheduling and appointment booking

This workflow automatically processes client booking requests, checks service availability, schedules appointments, and sends confirmations to streamline the commercial cleaning booking process.

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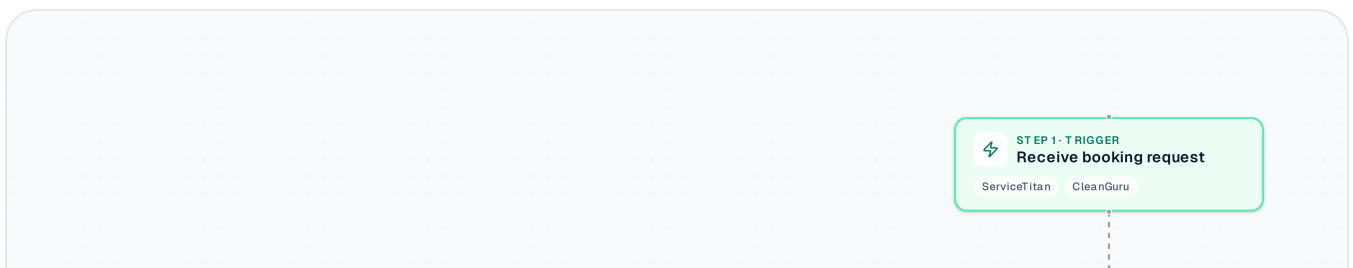


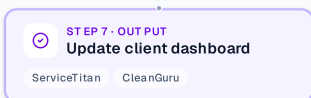
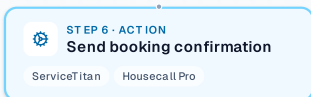
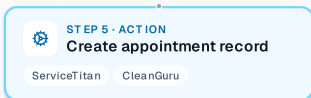
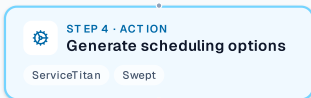
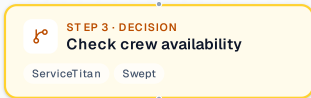
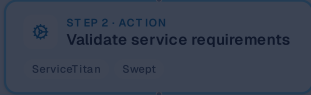
## WORKFLOW TRIGGER

Client submits service request through online booking form or customer portal

## 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 booking request

Client submits cleaning service request with location, service type, preferred date/time, and special requirements through online form. System captures all booking details and client information.

2

 ACTION

### Validate service requirements

System checks service type compatibility with location size and validates requested cleaning specifications. Calculates estimated duration and required crew size based on service parameters.

ServiceTitan

Swept

3

 DECISION

### Check crew availability

System checks staff schedules and route optimization to determine if requested time slot is available. Evaluates crew capacity, travel time, and existing appointments.

ServiceTitan

Swept

4

 ACTION

### Generate scheduling options

If preferred time unavailable, system suggests 3 alternative time slots within client's preferred date range. Optimizes suggestions based on route efficiency and crew availability.

ServiceTitan

Swept

5

 ACTION

### Create appointment record

System books confirmed appointment, assigns crew, updates staff schedules, and creates work order with service specifications. Integrates appointment into daily route optimization.

ServiceTitan

CleanGuru

6

 ACTION

## Send booking confirmation

Automated confirmation email/SMS sent to client with appointment details, crew information, and service checklist. Calendar invite and reminder notifications are scheduled.

ServiceTitan

Housecall Pro

7

 OUTPUT

## Update client dashboard

Client portal displays confirmed appointment with tracking capabilities and service details. Internal dashboard updates with new booking metrics and schedule optimization results.

ServiceTitan

CleanGuru



## Outputs

- Confirmed cleaning appointment with assigned crew

- Automated client confirmation and calendar integration

## AI Business OS



### Key Metrics

- Booking conversion rate
- Average response time to booking requests
- Schedule utilization percentage



### Tools & Integrations

- ServiceTitan
- CleanGuru
- Swept
- Housecall Pro

## AI Business OS

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

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