

Customer service request processing

This workflow automatically processes incoming customer service requests for electrical work, routing them to appropriate technicians and creating jobs with proper scheduling and material preparation. It streamlines the entire process from initial contact to job assignment, reducing response times and improving customer satisfaction.

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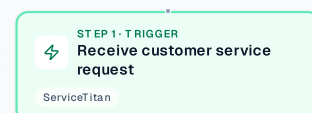


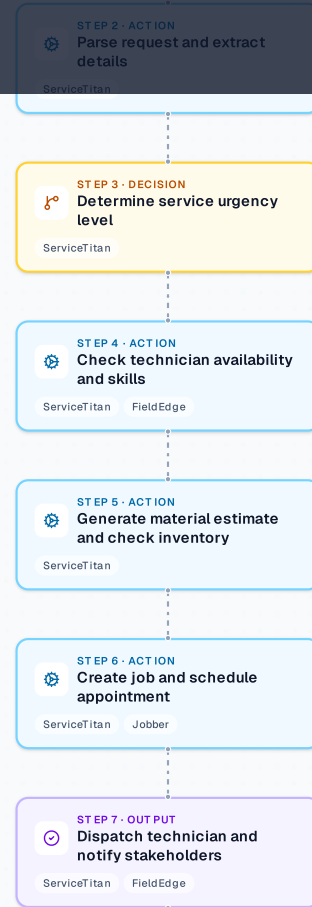
WORKFLOW TRIGGER

Customer submits electrical service request via phone, web form, or mobile app

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 customer service request

Customer service request is captured through ServiceTitan's customer portal, phone system, or mobile app. Request details include location,

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 ACTION

Parse request and extract details

Automatically extract key information from the request including service type, location, customer history, and preliminary material requirements. Categorize the electrical work type (repair, installation, emergency, inspection).

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 DECISION

Determine service urgency level

Evaluate if the request is an emergency (power outage, electrical hazard) requiring immediate dispatch, or standard work that can be scheduled normally. Emergency requests bypass normal scheduling queues.

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 ACTION

Check technician availability and skills

Query available technicians based on location proximity, skill specialization for the electrical work type, and current schedule capacity. Match technician certifications to job requirements.

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Generate material estimate and check inventory

Create preliminary parts list based on service type and check warehouse inventory levels. Flag items that need ordering and estimated material costs for the job.

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ACTION

Create job and schedule appointment

Generate work order with customer details, estimated duration, and material requirements. Schedule appointment slot and send automated confirmation to customer with technician details and arrival window.

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OUTPUT

Dispatch technician and notify stakeholders

Send job assignment to technician's mobile device with customer info, service details, and navigation. Notify customer service team and update job tracking dashboard with new assignment.

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Outputs

- Scheduled work order with assigned technician
- Customer confirmation with appointment details
- Technician dispatch notification with job specs
- Material requirements list for procurement



Key Metrics

- Average request-to-scheduling time
- First-call resolution rate
- Technician utilization rate



Tools & Integrations

- ServiceTitan
- FieldEdge
- Jobber

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