

Project scheduling and crew assignment

This workflow automatically schedules electrical projects and assigns optimal crew members based on skills, availability, and location proximity. It streamlines resource allocation and reduces manual scheduling conflicts while ensuring proper permit tracking.

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WORKFLOW TRIGGER

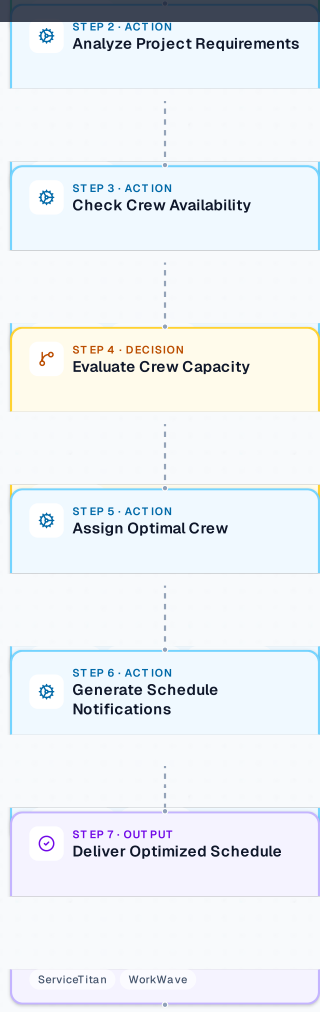


New electrical project is created or existing project deadline changes in ServiceTitan

Visual Flow

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

STEP 1 - TRIGGER
Project Created or Modified



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Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Project Created or Modified

A new electrical installation, repair, or maintenance project is added to ServiceTitan or an existing project timeline is updated. The system captures project details including location, scope, required skills, and deadline.

ServiceTitan

2

 ACTION

Analyze Project Requirements

Extract project specifications including required electrical certifications, estimated duration, material needs, and customer preferences. Cross-reference with permit requirements and safety protocols.

ServiceTitan

3

 ACTION

Check Crew Availability

Query WorkWave to identify available electricians and crews within the project timeframe. Filter by required certifications, proximity to job site, and current workload capacity.

WorkWave

ServiceTitan

4

 DECISION

Evaluate Crew Capacity

Determine if qualified crews are available during optimal time slots or if project rescheduling is needed. Branch based on availability and priority level of the electrical work.

WorkWave

5

Assign Optimal Crew

Automatically assign the best-matched crew based on skills, location proximity, and schedule efficiency. Update crew calendars and send dispatch notifications through FieldEdge.

FieldEdge

WorkWave

ServiceTitan

6

ACTION

Generate Schedule Notifications

Send automated scheduling confirmations to assigned electricians and customer appointment notifications. Include project details, material lists, and permit status updates.

ServiceTitan

FieldEdge

7

OUTPUT

Deliver Optimized Schedule

Produce finalized project schedule with crew assignments, customer communications sent, and all stakeholders notified. Update master scheduling dashboard with new allocations.

ServiceTitan

WorkWave



Outputs

- Optimized crew schedule with skill-based assignments
- Automated customer appointment confirmations
- Updated project timeline with permit tracking



Key Metrics

- Schedule utilization rate
- Crew assignment accuracy
- Customer notification response time



Tools & Integrations

- ServiceTitan
- WorkWave
- FieldEdge

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