

Customer scheduling and appointment reminders

Automates customer appointment scheduling from initial request through confirmation and reminder delivery, reducing no-shows and optimizing technician schedules. Increases booking efficiency and customer satisfaction while minimizing manual scheduling overhead.

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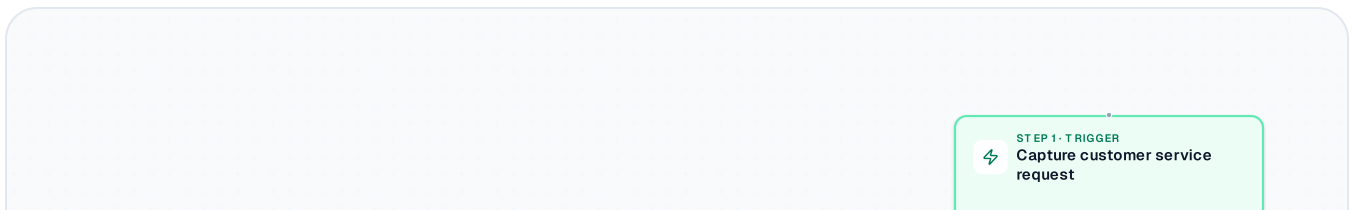


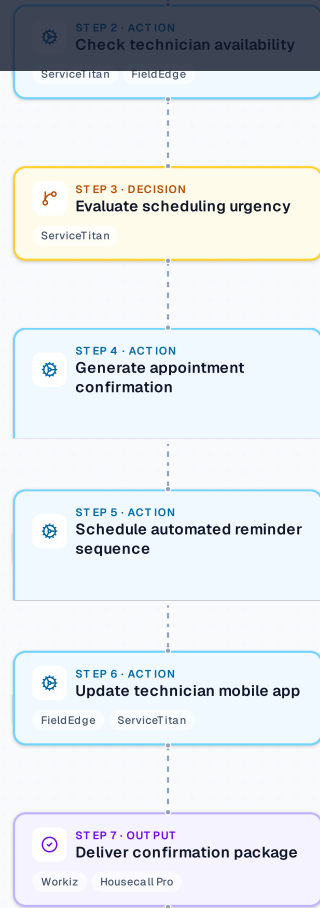
WORKFLOW TRIGGER

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

Visual Flow

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





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Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Capture customer service request

Customer initiates scheduling by submitting service details, preferred dates, and contact information through digital channels or phone intake.

2

 ACTION

Check technician availability

System queries technician schedules, skill sets, and geographic zones to identify available time slots matching customer preferences and service requirements.

ServiceTitan

FieldEdge

3

 DECISION

Evaluate scheduling urgency

Workflow branches based on service type and customer priority - emergency calls get immediate dispatch while routine maintenance follows standard booking flow.

ServiceTitan

4

 ACTION

Generate appointment confirmation

System creates confirmed appointment with assigned technician, sends booking details to customer via SMS and email, and blocks calendar time.

Jobber

ServiceTitan

Workiz

5

 ACTION

Schedule automated reminder sequence

Sets up multi-channel reminder notifications at 24 hours and 2 hours before appointment with technician details and service preparation

6

 ACTION

Update technician mobile app

Pushes appointment details, customer information, and job requirements to assigned technician's mobile device with route optimization.

FieldEdge

ServiceTitan

7

 OUT PUT

Deliver confirmation package

Customer receives comprehensive appointment confirmation with technician photo, arrival window, service details, and preparation checklist.

Workiz

Housecall Pro



Outputs

- Confirmed appointment in technician calendar
- Customer confirmation email and SMS
- Automated reminder sequence activated
- Updated customer service history



Key Metrics

- Appointment booking conversion rate
- No-show percentage
- Average time from request to confirmation



Tools & Integrations

- ServiceTitan
- Housecall Pro
- Jobber
- FieldEdge
- ServiceFusion
- Workiz

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