

Customer appointment booking and reminders

Automates the complete customer appointment booking process from initial request through confirmation and reminder notifications. Reduces manual scheduling overhead while ensuring optimal technician utilization and improved customer satisfaction.

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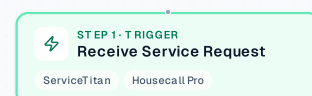


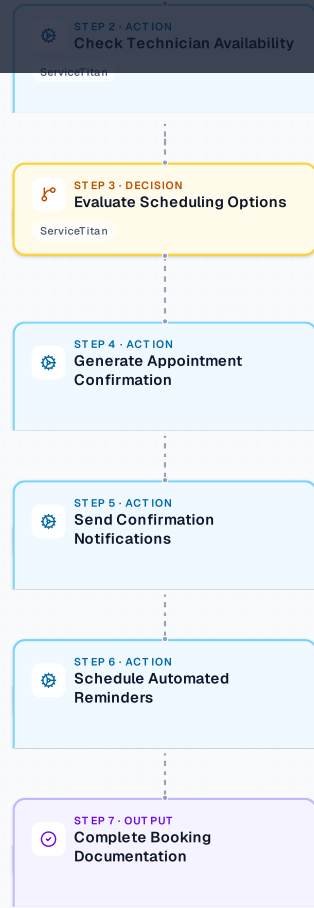
WORKFLOW TRIGGER

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

Receive Service Request

Customer initiates booking request with service details, preferred time slots, and contact information. System captures all relevant data including

service type, urgency level, and location.

AI Business OS

ServiceTitan

Housecall Pro

2

 ACTION

Check Technician Availability

System queries scheduling database to identify available technicians with appropriate skills for the requested service type. Considers location proximity, workload, and certification requirements.

ServiceTitan

Trimble Field Service Management

3

 DECISION

Evaluate Scheduling Options

Determines if immediate scheduling is possible or if alternative time slots need to be offered. Branches based on technician availability and customer urgency level.

ServiceTitan

4

 ACTION

Generate Appointment Confirmation

Creates confirmed appointment with assigned technician, service details, and estimated arrival time. Updates customer record and technician schedule simultaneously.

ServiceTitan

Housecall Pro

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 ACTION

Send Confirmation Notifications

Automatically dispatches confirmation email/SMS to customer with appointment details, technician profile, and service preparation instructions. Notifies assigned technician of new job.

ServiceTitan

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 ACTION

Schedule Automated Reminders

Sets up reminder sequence including 24-hour and 2-hour notifications with options to reschedule or cancel. Includes technician contact information and estimated arrival window.

ServiceTitan

Housecall Pro

7

 OUTPUT

Complete Booking Documentation

Generates work order, updates customer history, and creates invoice template for post-service billing. Ensures all stakeholders have necessary appointment information.

ServiceTitan

QuickBooks for Contractors



Outputs

- Confirmed appointment with assigned technician

- Automated reminder sequence activated

AI Business OS



Key Metrics

- Booking conversion rate
- Average scheduling response time
- Customer no-show rate



Tools & Integrations

- ServiceTitan
- Housecall Pro
- Trimble Field Service Management
- QuickBooks for Contractors

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