

Preventive maintenance scheduling

Automatically schedules and manages preventive maintenance appointments for plumbing customers based on service history and equipment age, reducing emergency calls and increasing customer retention.

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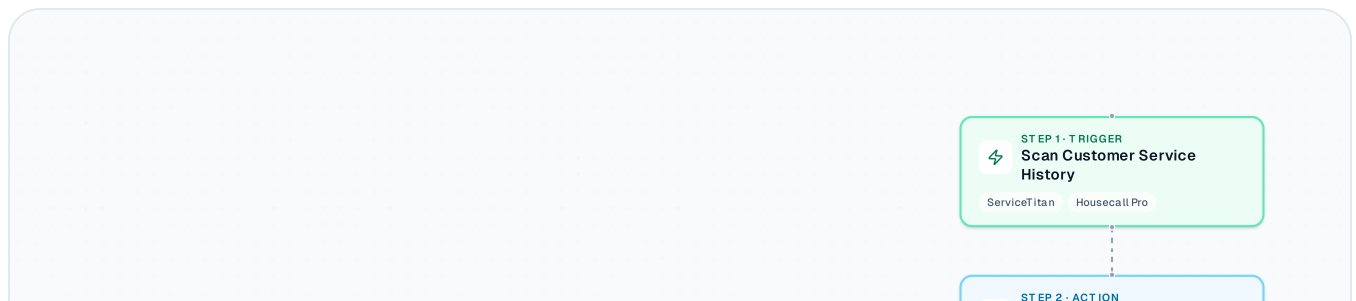
WORKFLOW TRIGGER

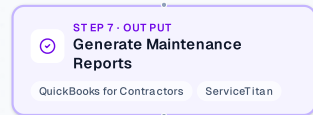
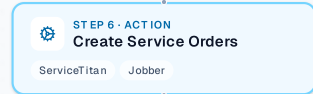
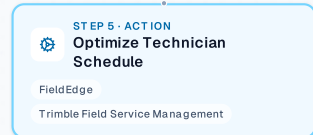
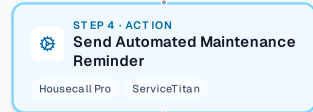
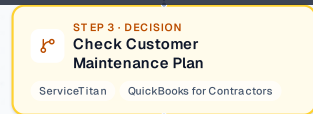
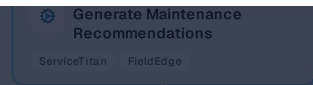


Scheduled monthly scan identifies customers due for preventive maintenance based on last service date and equipment type.

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

Scan Customer Service History

Monthly automated scan reviews all customer records to identify those due for preventive maintenance based on last service date and equipment warranties. System flags customers with water heaters, sump pumps, or main lines approaching recommended service intervals.

2

 ACTION

Generate Maintenance Recommendations

System analyzes equipment age, manufacturer recommendations, and past service history to create customized maintenance plans. Prioritizes high-value customers and critical equipment like commercial boilers or aging water heaters.

ServiceTitan

FieldEdge

3

 DECISION

Check Customer Maintenance Plan

Workflow branches based on whether customer has an active maintenance agreement or is a one-time service client. Existing plan members get priority scheduling while prospects receive promotional offers.

ServiceTitan

QuickBooks for Contractors

4

 ACTION

Send Automated Maintenance Reminder

Personalized emails or SMS messages are sent to customers with maintenance recommendations, available time slots, and seasonal promotions. Messages include equipment-specific benefits and potential cost savings.

Housecall Pro

ServiceTitan

5

 ACTION

AI Business OS

Optimize Technician Schedule

System automatically assigns confirmed appointments to technicians based on location, skill set, and current workload. Route optimization minimizes travel time between preventive maintenance and emergency calls.

FieldEdge

Trimble Field Service Management

6

⚙️ ACTION

Create Service Orders

Confirmed appointments automatically generate detailed service orders with customer history, equipment specifications, and recommended maintenance tasks. Pre-populates common parts and estimated completion times.

ServiceTitan

Jobber

7

📄 OUTPUT

Generate Maintenance Reports

System produces scheduled appointment confirmations, technician route sheets, and customer follow-up tasks. Creates billing entries for maintenance plan customers and tracks completion metrics.

QuickBooks for Contractors

ServiceTitan



Outputs

- Scheduled preventive maintenance appointments
- Optimized technician routes and assignments
- Customer communication confirmations



Key Metrics

- Preventive maintenance booking rate
- Customer retention percentage
- Emergency call reduction



Tools & Integrations

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

AI Business OS

AI Business OS

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