

Job scheduling and crew assignment

Automatically schedules roofing jobs and assigns optimal crews based on project requirements, crew availability, and location proximity. Reduces scheduling conflicts and improves project completion rates.

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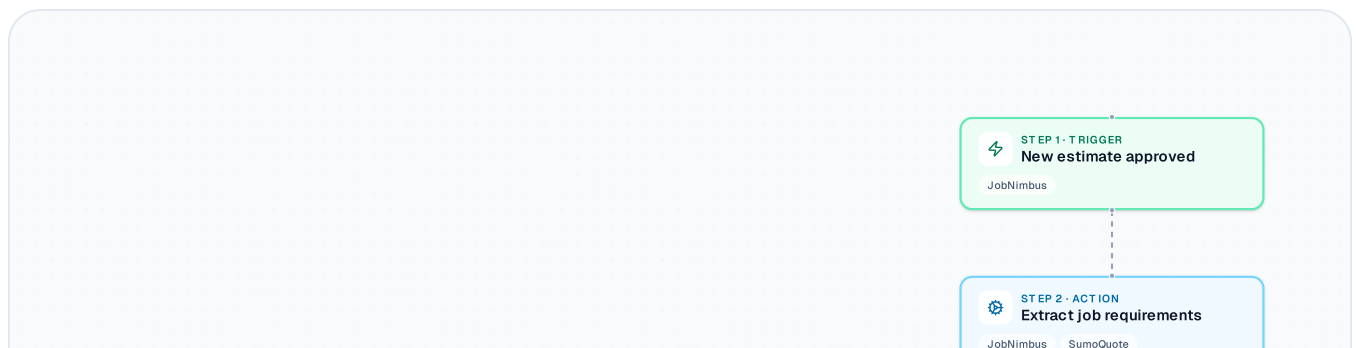


WORKFLOW TRIGGER

New approved roofing estimate is created in JobNimbus

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

New estimate approved

A roofing estimate is marked as approved by the customer in JobNimbus. This triggers the automated scheduling workflow to begin crew assignment.

JobNimbus

2

 ACTION

Extract job requirements

Pull project details including roof size, material type, complexity level, and estimated duration from the approved estimate. Calculate required crew size and skill level needed.

JobNimbus

SumoQuote

3

 ACTION

Check crew availability

Query current crew schedules and availability windows. Cross-reference with location proximity to minimize travel time between job sites.

JobNimbus

4

 DECISION

Evaluate crew capacity

Determine if qualified crews are available within the customer's preferred timeframe. If not available, identify next best scheduling options.

JobNimbus

5

Assign optimal crew

Automatically assign the best-matched crew based on skills, availability, and location. Block out the scheduled time slots in crew calendars.

JobNimbus

6

 ACTION

Send notifications

Automatically notify assigned crew members of the new job details and send confirmation to customer with scheduled date and crew information.

JobNimbus

7

 OUT PUT

Generate schedule confirmation

Create finalized job schedule with crew assignments, timeline, and all relevant project details. Update master scheduling dashboard with new commitment.

JobNimbus



Outputs

AI Business OS

- Assigned crew schedule
- Customer confirmation notification
- Updated master job calendar



Key Metrics

- Crew utilization rate
- Average scheduling response time
- Job completion on-time percentage



Tools & Integrations

- JobNimbus
- SumoQuote

AI Business OS

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