

Automated customer intake: every request becomes one job record

Form, text, or call, the same five steps run in the same order. A person checks the record instead of building it.

1 · EVERY CHANNEL LANDS IN ONE INTAKE QUEUE

WEBSITE FORM

Name, phone, "water heater leaking." No house number.

Sun 9:40 PM

TEXT + PHOTOS

Same customer, two photos of the tank, sent to the business number.

Mon 7:15 AM

PHONE CALL

Recorded and transcribed, so a 2-minute call becomes text the next step can read.

Mon 8:02 AM

FACEBOOK / GOOGLE MESSAGES

Business Profile and page messages, plus missed-call text-back threads.

Any time

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AI READS EACH ONE

2 · AI PULLS OUT THE JOB DETAILS

"hi this is karen on hawthorne in mason, the water heater in the basement is dripping from the bottom, theres maybe half an inch of water. its a rheem i think? can someone come today"

Name	Karen
Address	Hawthorne Dr, Mason, OH house # missing
Job type	Water heater leak
Equipment	Rheem (unconfirmed)
Urgency	Same day active leak, standing water
Photos	2 attached to the job

Urgency follows the owner's written rules, not the model's judgment. A gas smell skips the queue: leave the house, call the gas company, on-call tech paged.

3 · CHECK FOR A RETURNING CUSTOMER

Match order

1ST Phone number	2ND Standardized address	LAST Name, tiebreak only
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Phone + address match: attach to the existing customer and property.

Only one matches: ask a person. Never merge on name alone.

No match: create a new customer.

Karen Mills-Ortega, new cell number, same address as Karen Mills (2023 disposal install). Same person?

Yes, merge**No, keep separate**

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ONE CLEAN RECORD

4 · PUSH TO JOB SOFTWARE AND CALENDAR

Job software

New request with transcript, photos, and the 2023 note: shutoff behind the dryer.

Calendar

Hold placed. A person confirms the 10-12 window.

Same-day urgent

Goes straight to whoever is on call.

After booking

Appointment reminders take over from here.

5 · ONE FOLLOW-UP TEXT FOR WHAT'S MISSING

SENT AUTOMATICALLY

"Thanks Karen, we've got you down for a water heater leak today. What's the house number on Hawthorne? And if you can, send a photo of the label on the side of the tank."

CUSTOMER REPLY

"4172" + photo of the tank label

RESULT

Record updates itself. Nobody calls her back to ask what she already said.

HOW IT TURNS ON

First hour

Owner and office manager write the rules: required fields, urgency, who gets paged.

Weeks 1-2: draft mode

→ Every record gets approved before it touches the calendar or customer list.

After a clean week

→ Records file themselves. Single-match merges always stay with a person.

Rules we'd write in before turning it on

Keep the web form short

Name, phone, what's wrong. The follow-up text catches the rest.

One follow-up, not a form

Ask only for what's missing. One question, two at most.

Never merge on name alone

Phone and address both, or a person decides.

Many addresses, one customer

Landlords and property managers get properties, not duplicate records.

