

Appointment Reminders

Send automated notification for appointments with customers and end no-shows.

Scenario

You have a packed calendar that is full of estimate requests, customer referrals, and job site visits. There aren't enough hours in the day to get to all of it. This makes it all the more difficult when you are left standing alone on a doorstep after driving 45 minutes.

JobNimbus helps end no-show appointments by sending out appointment reminders before you arrive. Customize email messages to include what to expect, how to reschedule, and any details about the work you perform.

Setup

In the Automation tab within settings:

1. Click "+ Add rule" and create a name.
2. Select "Time based" as the trigger type.
3. Select "Task" as the trigger record.
4. Run this automation: "1 Days Before Start Date & Time".
5. Click "+Add Condition" and select "If Task Type is equal to Appointment".
6. Click "+ Add action" and select Send Email, selecting your reminder template.
7. Set recipients to "All Related Contacts".

Email Template Setup:

Use template fields to create customized messaging that includes names, appointment times, and more.

For example, you can create an email subject that displays the date and time of the appointment by including:

"Your Appointment reminder for {{TaskDate-Start}} at {{TaskTimeStart}}".

The screenshot shows the 'Add Automation Rule' interface. The 'Rule Name' is '1 Day Prior Email Reminder'. The 'Trigger type' is 'Time based' and the 'Trigger record' is 'Task'. Under 'Run this automation:', it is set to '1 Days' before the 'Start Date & Time'. There are checkboxes for 'On the next' (set to Sunday) and 'At' (set to 12:00 AM). The 'Conditions' section contains one condition: 'If Task Type is equal to Appointment'. The 'Actions' section contains one action: 'Send Email: 1 Day Prior Email Reminder'. There are '+ Add condition' and '+ Add action' buttons, and 'Cancel' and '+ Save' buttons at the bottom.

Benefits

- Don't waste time on no-show appointments.
- Display a high level of professionalism to potential customers.
- Set reminder automations for any time frame, such as one week prior, the day before, and one hour before.
- Provide custom automated emails with customer names, addresses, appointment times, and more.
- Provide instructions to customers on what to expect, what information they need to provide, how to reschedule, and introduce your team prior to meeting.