

Field Service Booking Template

Company information

Company name:

Phone: License #:

Service area:

Website: Email:

Customer information

Customer name:

Service address:

Billing address (if different):

Phone (primary): Phone (alt):

Email:

Preferred contact method:

Service request details

Service type:
e.g., Tune-up, Repair, Installation, Emergency service, Opener replacement

Problem description / reason for call:

Customer-reported symptoms:

Door brand / model (if known): Opener brand/model:

Approximate door age: # of car spaces:

Access notes (gate code, key box, pe):

Appointment scheduling

Requested date: Requested time window:
Confirmed date: Confirmed time window:
Assigned technician: Dispatcher:
Service priority:
Standard / Urgent / Emergency (same-day)

- Customer confirmed appointment by phone
- Appointment confirmation sent by text or email

Job details (completed by technician on arrival)

Arrived:

Work performed:

Parts used (description and quantity):

Departed:

Total labor hours: hrs

Cost summary

Labor: Parts/materials:
Service/trip charge: Tax:
Total due:
Payment method:
 Payment collected at time of service

Follow-up and notes

Recommended follow-up work:

Follow-up appointment scheduled
Follow-up date / time:

Authorization and sign-off

Technician signature:

Date:

Customer signature:

Date: