

THE SOLO APPLIANCE REPAIR OPERATING GUIDE

How to handle calls, intake, scheduling, parts, and return visits
without living on your phone or hiring an office person too early

FREE / MANUAL

LOW-COST SYSTEM

MORE HANDS-OFF

A practical field guide for solo and very small appliance-repair businesses

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1. The real bottleneck is not the phone

If you are fixing appliances all day, every new inquiry creates a second job: capture the customer, figure out what is broken, decide whether the job fits, find a time, remember the details, and keep the repair moving after the first visit.

A missed call is only the visible symptom. The deeper problem is that the entire customer-intake and job-follow-up process often depends on the technician remembering to do the next thing.

The goal: let the customer move forward even when you are under a washer, driving, or finishing another job.

The workflow you are actually managing

- **1. New inquiry** - Phone, text, Facebook message, website form, referral.
- **2. Intake** - Name, address, appliance, brand, model, symptoms, availability.
- **3. Qualification** - Service area, appliance type, job fit, urgency, diagnostic fee.
- **4. Scheduling** - Pick a window that fits the route and leaves room for overruns.
- **5. Diagnostic visit** - Inspect, diagnose, document appliance and needed parts.
- **6. Parts pending** - Order the part and keep the job visible.
- **7. Return visit** - When the part arrives, schedule Visit 2 on the same job.
- **8. Completion** - Repair, invoice, collect payment, close the job, request a review.

Where solo shops usually break

- Calls and messages arrive in several places, so some never become scheduled jobs.
- The customer gets booked before you have useful appliance or symptom details.
- Every appointment is treated the same even though diagnostics and returns behave differently.
- A job mentally disappears after diagnosis while the part is still on order.
- The owner becomes the only person who knows what should happen next.

2. Build one intake lane

The first improvement is not buying software. It is deciding what information every new customer must provide before the job reaches your calendar.

Minimum useful intake

- Customer name
- Best callback number
- Service address / ZIP code
- Appliance type
- Brand
- Model number, if available
- Symptoms or error code
- Photo of model/data plate, if possible
- Warranty or home-warranty status
- Preferred appointment windows
- Anything that makes the job urgent

The one-lane rule

No matter how the customer first contacts you, every legitimate service request should end up in one place before it gets scheduled. That place can be a spreadsheet, form, calendar-linked intake tool, or field-service platform. The tool matters less than the rule.

Incoming channel	What happens next
Phone call	You or the answering system enters the same intake.
Text / Facebook / email	Send the customer to the same intake or enter it yourself.
Website	Use the same required fields before confirming an appointment.

3. Schedule for a technician, not for a call center

A solo operator calendar has to absorb traffic, long diagnostics, parts pickups, difficult machines, and customers who are not ready when you arrive. Filling every visible opening can make the day look productive while making the route miserable.

Separate diagnostics from returns: A diagnostic call is uncertain. A parts-return visit is usually more predictable.

Batch by area: Group work by ZIP code or part of town when possible.

Keep a buffer: One difficult refrigerator should not destroy four later appointments.

Create an urgent-call rule: Decide in advance what qualifies for same-day attention.

Use arrival windows: A reasonable window is often safer than pretending every service call starts at an exact minute.

Collect before confirming: Do not let an empty calendar slot become a bad job just because the customer reached you first.

A simple daily template

Block	Purpose
Early morning	Parts pickup / one predictable return
Morning	2-3 geographically close diagnostics
Midday buffer	Overrun, lunch, supplier, urgent call
Afternoon	Diagnostics + returns in the same area
End of day	15-30 minutes for exceptions only - not a second shift

Important: the template is not the point. The point is to stop each inbound call from rewriting your day in real time.

4. Do not lose the job between Visit 1 and Visit 2

Appliance repair has a workflow problem that many generic calendars handle poorly: the diagnostic visit may finish, but the job is not finished.

Use job status, not memory

- New request
- Scheduled - diagnostic
- Diagnosed - no part required
- Part to order
- Waiting on part
- Part received / ready to schedule
- Scheduled - return visit
- Completed / paid
- Closed - declined / unrepairable / no response

If you can look at your system at 4:30 PM and instantly see every customer waiting on a part, every part that arrived, and every return that still needs a date, the system is doing useful work. If you have to remember names, search texts, or look through supplier emails, it is not.

The return-visit checklist

- Keep the original diagnosis, appliance details, and part information attached to the same customer/job.
- Do not mark the job complete merely because the diagnostic visit ended.
- When the part arrives, move the job into a visible ready-to-schedule state.
- Contact the customer from the business system rather than a personal text thread when possible.
- Schedule the return as a distinct appointment linked to the same job.

5. Choose the cheapest operating level that removes the bottleneck

You do not need to automate everything. The best setup is the cheapest system that reliably keeps customers moving without dragging you out of repair work.

Level	Best for	Core setup	Upgrade when...
1. Free / manual	A few new calls per week	Business voicemail, one intake form, shared calendar, written job-status list	You forget leads, spend nights returning calls, or lose track of parts/returns.
2. Low-cost system	Busy solo operator	Online intake + booking, automatic confirmations/reminders, simple FSM or structured CRM	Calls still interrupt jobs or customers need help completing intake.
3. More hands-off	Steady inbound volume	Live or AI call handling tied to intake/booking + field-service workflow	The cost of missed/interrupting calls exceeds the cost of delegated intake.

What should I fix first?

Are leads disappearing before they get scheduled? Fix intake and follow-up first.

Are you constantly interrupted but the leads are getting scheduled? Fix call handling / self-service first.

Are days chaotic because jobs are geographically scattered? Fix scheduling and routing first.

Are parts jobs disappearing after diagnosis? Fix job status and return-visit workflow first.

Are all four happening? You may be ready for a field-service system or delegated front desk.

6. A 7-day reset for a solo appliance-repair shop

Day 1: Write the exact intake fields you need before accepting a service call.

Day 2: Create one intake form or structured note template. Stop using different formats for phone, text, and Facebook leads.

Day 3: Create separate appointment types for diagnostic calls and return visits.

Day 4: Create visible statuses for parts ordered, waiting on part, and ready to schedule.

Day 5: Set one rule for urgent same-day jobs and one rule for your service area.

Day 6: Turn on confirmations/reminders or create reusable text templates.

Day 7: Count what still required you to stop a repair or work after dinner. That remaining bottleneck is what you should automate or delegate next.

What success looks like

- Fewer interruptions during repairs.
- Every legitimate inquiry becomes either a scheduled job or a documented no.
- You have useful appliance information before you arrive.
- Waiting-on-parts jobs stay visible.
- Return visits do not depend on memory.
- Evening admin shrinks instead of expanding as call volume grows.

7. Use tools only after you know the bottleneck

There is no single best software or receptionist for every solo appliance-repair business. The right category depends on what is actually failing.

If the problem is...	Look at...
Customers cannot reach you	Business phone, overflow answering, AI/live receptionist, missed-call recovery
Customers can reach you but intake is incomplete	Structured intake forms, booking software, model/photo capture
Scheduling is chaotic	Field-service scheduling, route-aware booking, appointment-type rules
Parts jobs disappear	Job statuses, parts tracking, linked return visits
You re-enter the same information everywhere	An integrated field-service platform / CRM

The rule: do not buy a category because somebody marketed it to you. Buy the smallest thing that removes the expensive recurring bottleneck.

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Educational guide. Product capabilities and pricing change; verify current features before purchasing.

Research basis

This guide was built from current appliance-repair operator discussions and appliance-specific workflow/scheduling products. The test intentionally avoids endorsing a vendor; the goal is to diagnose the operating bottleneck first.