

Project estimation and quoting

Automates the creation of accurate project estimates and professional quotes for flooring and tile installations by gathering measurements, calculating materials, and generating customer proposals. This streamlines the sales process and reduces time from initial inquiry to quote delivery.

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WORKFLOW TRIGGER

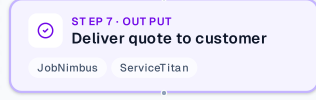
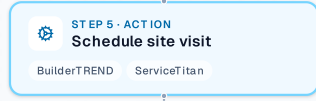
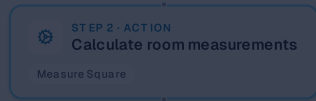


Customer submits project inquiry through website form or phone call requesting flooring/tile installation quote.

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





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Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Receive project inquiry

Customer submits project details including room dimensions, material preferences, and timeline through web form or CRM system. Initial project record is created with customer contact information.

2

 ACTION

Calculate room measurements

Import or input room dimensions into measurement software to calculate accurate square footage and material requirements. System accounts for waste factors and pattern matching.

Measure Square

3

 DECISION

Check material availability

Query inventory management system to verify if requested materials are in stock or need to be ordered. Determines if standard pricing applies or if special order pricing is needed.

ProfitDig

FloorRight

4

 ACTION

Generate cost breakdown

Calculate total project costs including materials, labor, and markup using pricing database. System applies appropriate rates based on job complexity and material type.

ProfitDig

FloorRight

5

 ACTION

Schedule site visit

Automatically schedule appointment for field measurement and estimate verification based on estimator availability and customer preferences. Send calendar invites to both parties.

BuilderTREND

ServiceTitan

6

 ACTION

Create professional proposal

Generate detailed quote document with itemized costs, material specifications, timeline, and terms. Include visual mockups and warranty information for customer presentation.

JobNimbus

BuilderTREND

7

 OUTPUT

Deliver quote to customer

Automatically send professional proposal via email with digital signature capabilities and follow-up reminders. Customer receives detailed breakdown and can accept quote online.

JobNimbus

ServiceTitan



Outputs

- Professional quote document with itemized pricing

- Scheduled site visit appointment

AI Business OS



Key Metrics

- Quote-to-close conversion rate
- Average time from inquiry to quote delivery
- Estimate accuracy percentage



Tools & Integrations

- JobNimbus
- Measure Square
- ProfitDig
- FloorRight
- BuilderTREND
- ServiceTitan

AI Business OS

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