

Estimating and quoting

Automatically generates accurate service estimates and quotes by pulling customer history, calculating pricing based on parts/labor, and delivering professional quotes to customers within minutes of service request.

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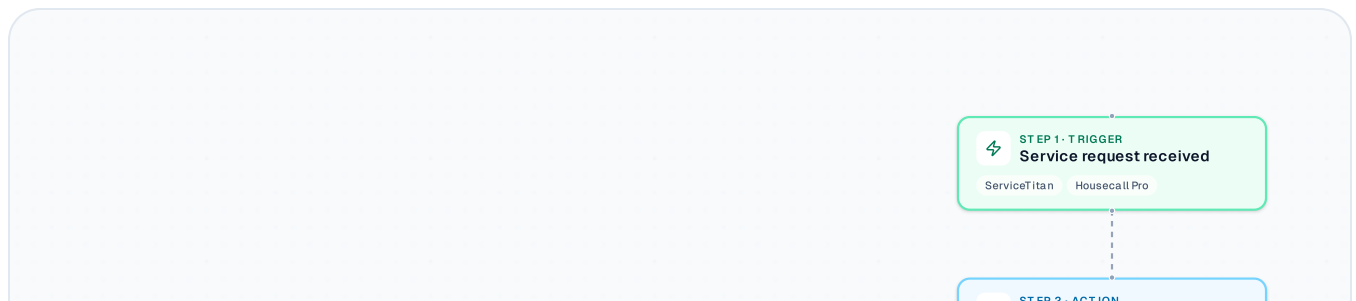


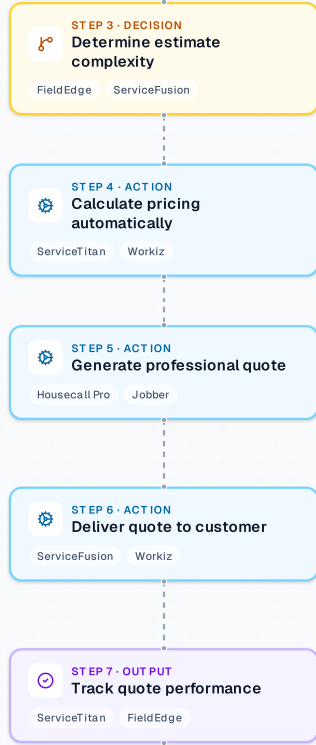
WORKFLOW TRIGGER

Customer submits service request through online booking or phone call requiring estimate

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

Service request received

Customer submits a service request through online booking form, phone call, or mobile app requiring an estimate. System captures job details, location, and urgency level.

2

 ACTION

Pull customer history

System retrieves existing customer data including previous service records, equipment details, warranty status, and pricing history. New customers are flagged for additional verification.

ServiceTitan

Jobber

3

 DECISION

Determine estimate complexity

Workflow branches based on job complexity - simple repairs use automated pricing while complex installations require technician assessment. Decision made using job type, equipment age, and historical data.

FieldEdge

ServiceFusion

4

 ACTION

Calculate pricing automatically

For standard jobs, system pulls current parts pricing, applies labor rates based on job complexity and technician skill level. Includes markup calculations and any applicable discounts.

ServiceTitan

Workiz

5

 ACTION

Generate professional quote

System creates branded PDF quote with itemized pricing, warranty information, payment terms, and service timeline. Includes photos of similar completed work and customer testimonials.

Housecall Pro

Jobber

6

 ACTION

Deliver quote to customer

Quote is automatically sent via customer's preferred communication method (email, SMS, or customer portal) with online acceptance options. Follow-up reminders are scheduled if no response received.

ServiceFusion

Workiz

7

 OUTPUT

Track quote performance

System logs quote delivery, customer response time, acceptance rate, and schedules follow-up actions. Analytics are updated for pricing optimization and conversion tracking.

ServiceTitan

FieldEdge



Outputs

- Professional branded quote delivered to customer

- Customer acceptance tracking initiated

AI Business OS



Key Metrics

- Quote-to-job conversion rate
- Average quote response time
- Pricing accuracy vs actual job cost



Tools & Integrations

- ServiceTitan
- Housecall Pro
- Jobber
- FieldEdge
- ServiceFusion
- Workiz

AI Business OS

Actionable AI implementation strategies for business leaders ready to transform their operations.

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