

Customer quote generation and estimation

Automatically generates accurate moving quotes by capturing customer details, calculating costs based on inventory and distance, and delivering personalized estimates. This streamlines the sales process and improves quote accuracy while reducing manual effort.

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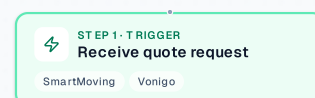


WORKFLOW TRIGGER

Customer submits moving quote request through online form or phone inquiry

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 quote request

Customer inquiry with moving details is captured through website form, phone system, or CRM. Basic information includes origin/destination

addresses, moving date, and contact details.

AI Business OS

SmartMoving Vonigo

2

 ACTION

Validate addresses and distance

System verifies both pickup and delivery addresses for accuracy and calculates precise mileage. Route complexity and accessibility factors are also assessed.

SmartMoving

Google Maps API

3

 ACTION

Collect inventory details

Customer provides detailed inventory list through digital form or virtual survey. System categorizes items by weight, volume, and special handling requirements.

MoveitPro

SmartMoving

4

 DECISION

Determine service complexity

Workflow branches based on move complexity - standard residential moves get automated pricing while complex moves requiring special services get flagged for manual review.

SmartMoving

MoveitPro

5

 ACTION

Calculate pricing and fees

System applies rate tables, fuel surcharges, seasonal adjustments, and additional service fees. Labor hours and truck size requirements are automatically determined.

MoveitPro

SmartMoving

6

 ACTION

Generate quote document

Professional quote document is created with itemized pricing, terms, and service details. Multiple service tier options may be presented to customer.

SmartMoving

Vonigo

7

 OUTPUT

Deliver quote to customer

Completed quote is automatically sent via email with booking links and follow-up communications scheduled. Quote is also logged in CRM for tracking.

Vonigo

SmartMoving



Outputs

- Professional moving quote document

- Automated follow-up email sequence

AI Business OS

• Unified record with customer details and quote status



Key Metrics

- Quote response time
- Quote-to-booking conversion rate
- Quote accuracy rate



Tools & Integrations

- SmartMoving
- Vonigo
- MoveitPro
- Google Maps API

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