

Retainer and contract management

This workflow automates retainer collection, contract generation, and client onboarding for photography sessions, ensuring all legal and financial requirements are met before shoots begin.

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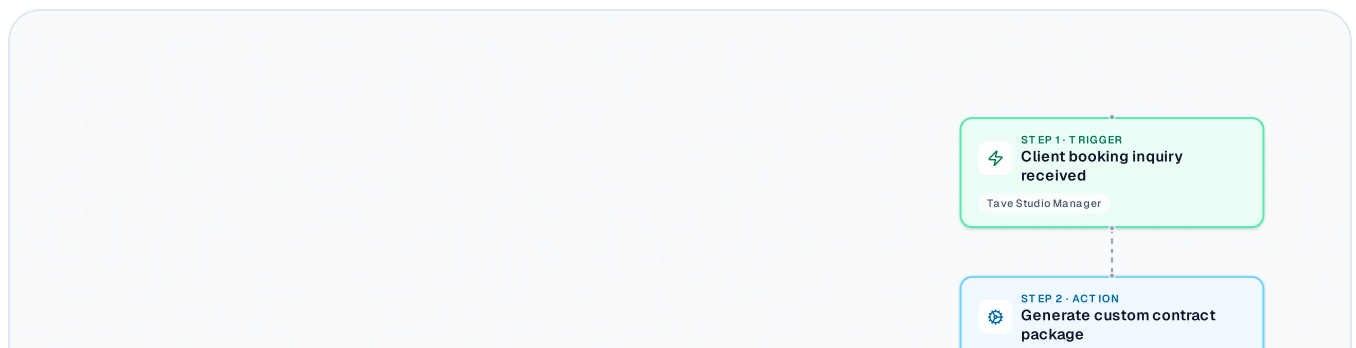


WORKFLOW TRIGGER

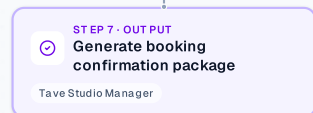
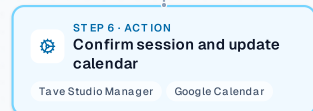
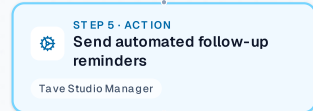
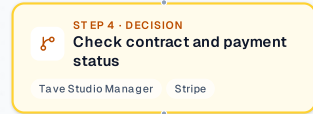
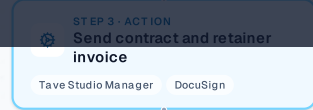
Client submits booking inquiry through studio website or booking system

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

Client booking inquiry received

A potential client submits a photography session request with project details, preferred dates, and contact information. This automatically initiates the contract and retainer management process.

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2

 ACTION

Generate custom contract package

System creates personalized contract documents based on session type, location, and client requirements. Contract includes pricing, deliverables, and terms specific to the photography package.

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3

 ACTION

Send contract and retainer invoice

Automated email sends the contract for e-signature along with retainer invoice (typically 25-50% of total cost). Client receives secure links for document signing and payment processing.

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DocuSign

4

 DECISION

Check contract and payment status

System monitors whether client has signed contract and paid retainer within specified timeframe (usually 7 days). Workflow branches based on completion status.

5

ACTION

Send automated follow-up reminders

If contract/payment incomplete, system sends personalized reminder emails at 3-day and 6-day intervals. Final reminder includes deadline notice and potential booking cancellation warning.

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ACTION

Confirm session and update calendar

Upon contract signature and retainer payment, system automatically confirms the photography session, blocks calendar dates, and triggers client welcome sequence with session preparation details.

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Google Calendar

7

OUT PUT

Generate booking confirmation package

System creates comprehensive confirmation package including signed contract, payment receipt, session timeline, location details, and preparation checklist for both client and photographer.

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Outputs

- Signed photography contract
- Retainer payment confirmation
- Confirmed calendar booking
- Client preparation checklist



Key Metrics

- Contract completion rate
- Average time to retainer payment
- Booking confirmation rate
- Follow-up email effectiveness



Tools & Integrations

- Tave Studio Manager
- DocuSign
- Stripe
- Google Calendar

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