

Contract generation and management

Automatically generates customized wedding planning contracts from initial client consultation data and manages the entire approval process through digital signature collection. This streamlines contract creation and reduces time-to-signature from days to hours.

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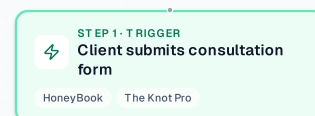
WORKFLOW TRIGGER

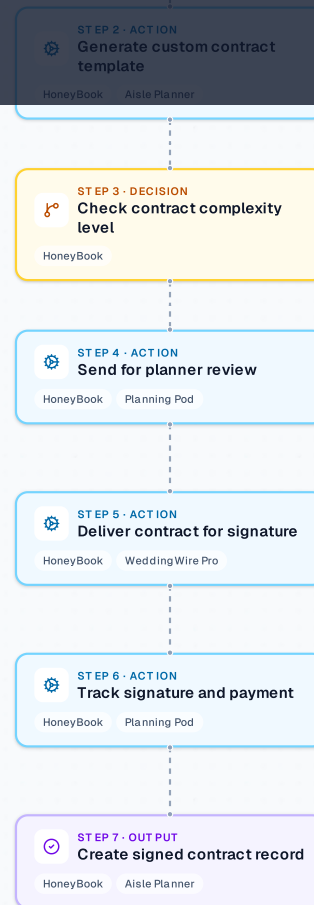


Client completes initial consultation form with wedding details and package selection

Visual Flow

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





Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Client submits consultation form

Wedding client fills out detailed consultation form including wedding date, guest count, venue, and selected service package. Form data is captured and validated for contract generation.

2

 ACTION

Generate custom contract template

System pulls client data and selected package details to auto-populate contract template with pricing, timeline, and service specifications. Custom clauses are added based on venue type and package selections.

HoneyBook

Aisle Planner

3

 DECISION

Check contract complexity level

System evaluates if contract requires manual review based on custom requests, budget threshold, or venue restrictions. Routes accordingly for approval workflow.

HoneyBook

4

 ACTION

Send for planner review

Complex contracts are routed to senior wedding planner for review and manual adjustments. Planner receives notification with highlighted areas needing attention.

HoneyBook

Planning Pod

5

 ACTION

Deliver contract for signature

Finalized contract is automatically sent to client via email with digital signature portal. Payment schedule and next steps are included in delivery.

HoneyBook

WeddingWire Pro

6

 ACTION

Track signature and payment

System monitors contract signature status and automatically processes initial payment upon completion. Client and planner receive confirmation notifications.

HoneyBook

Planning Pod

7

 OUTPUT

Create signed contract record

Fully executed contract is stored in client file with payment confirmation and timeline milestones. Wedding timeline and vendor coordination workflows are automatically initiated.

HoneyBook

Aisle Planner



Outputs

- Signed wedding planning contract
- Initial payment confirmation

- Automated wedding timeline creation

AI Business OS



Key Metrics

- Contract-to-signature conversion time
- Manual review rate percentage
- Payment collection success rate



Tools & Integrations

- HoneyBook
- The Knot Pro
- Aisle Planner
- Planning Pod
- WeddingWire Pro

AI Business OS

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