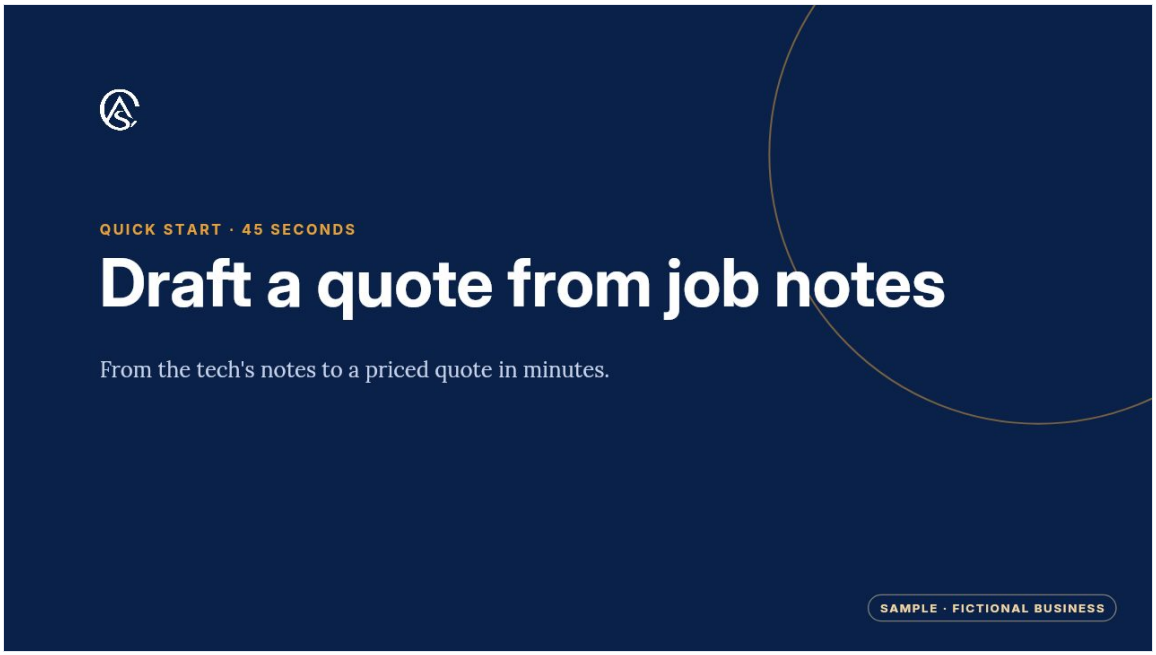
QUOTE & FOLLOW-UP ASSISTANT · QUICK START

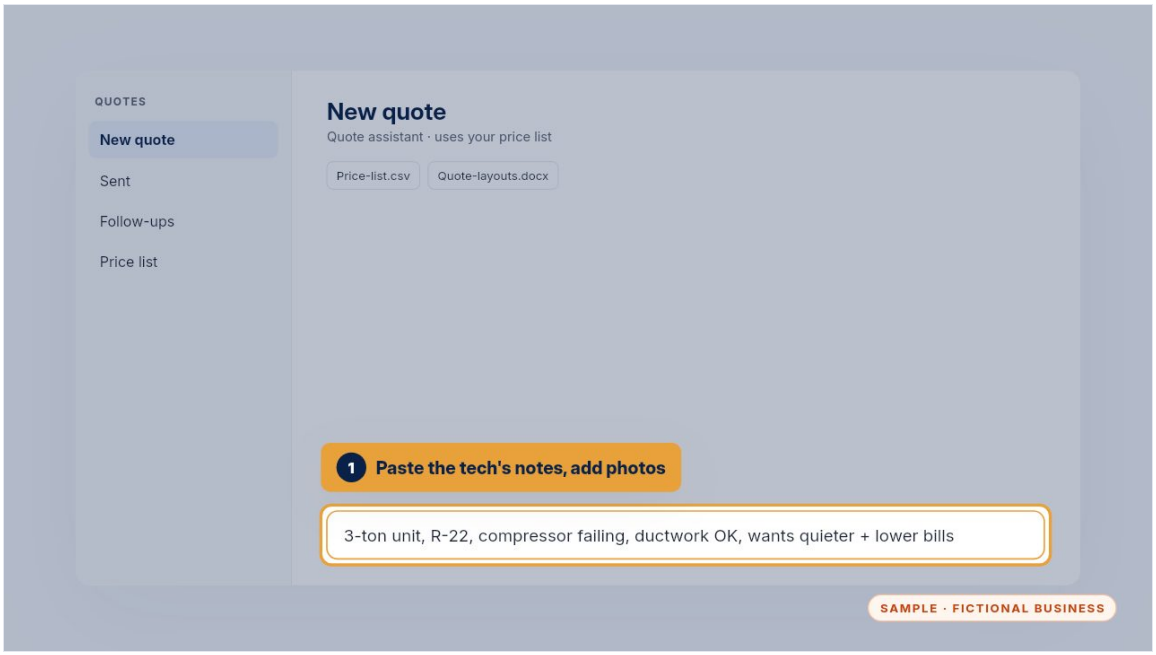
Draft a quote from job notes

Turn a tech's notes and photos into a good, better, best quote with your own prices.

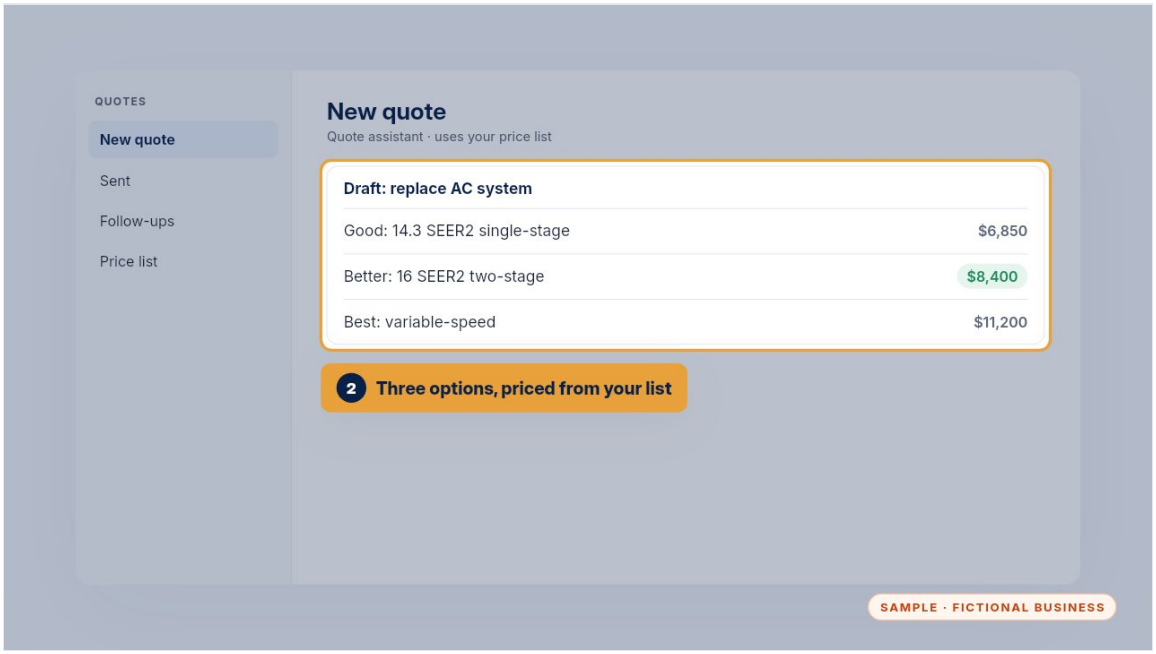
Watch the narrated video: https://openarmsolutions.com/guides/quote-follow-up/draft-a-quote-from-job-notes



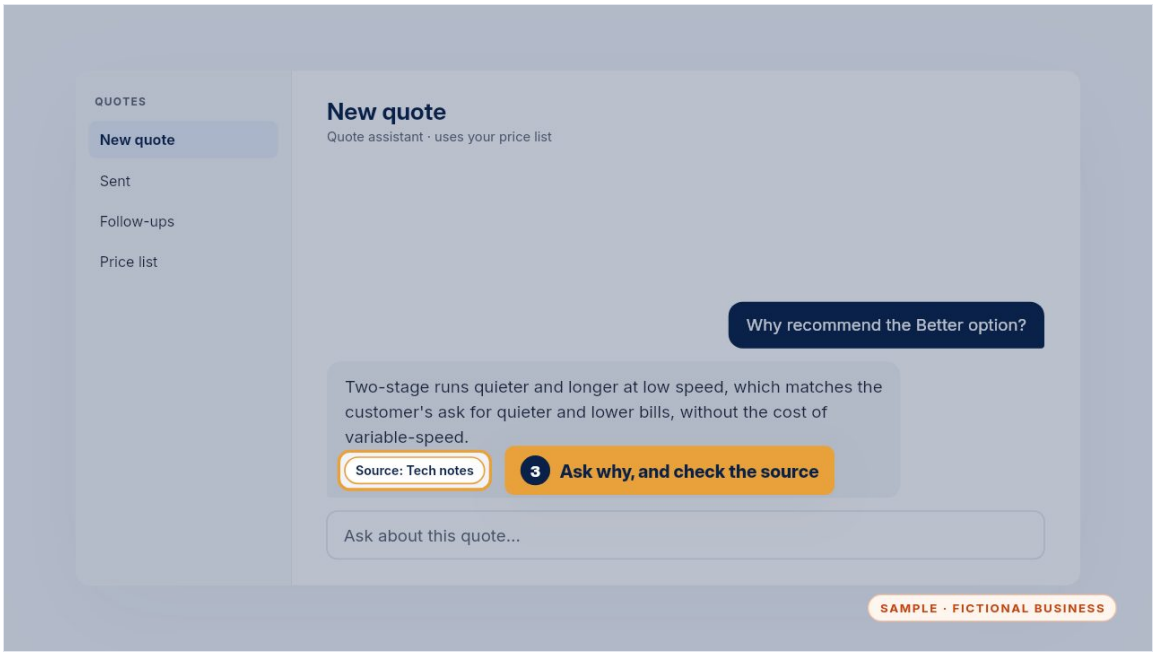
1 Here's how to turn a tech's job notes into a priced quote in a couple of minutes, using only your own prices.



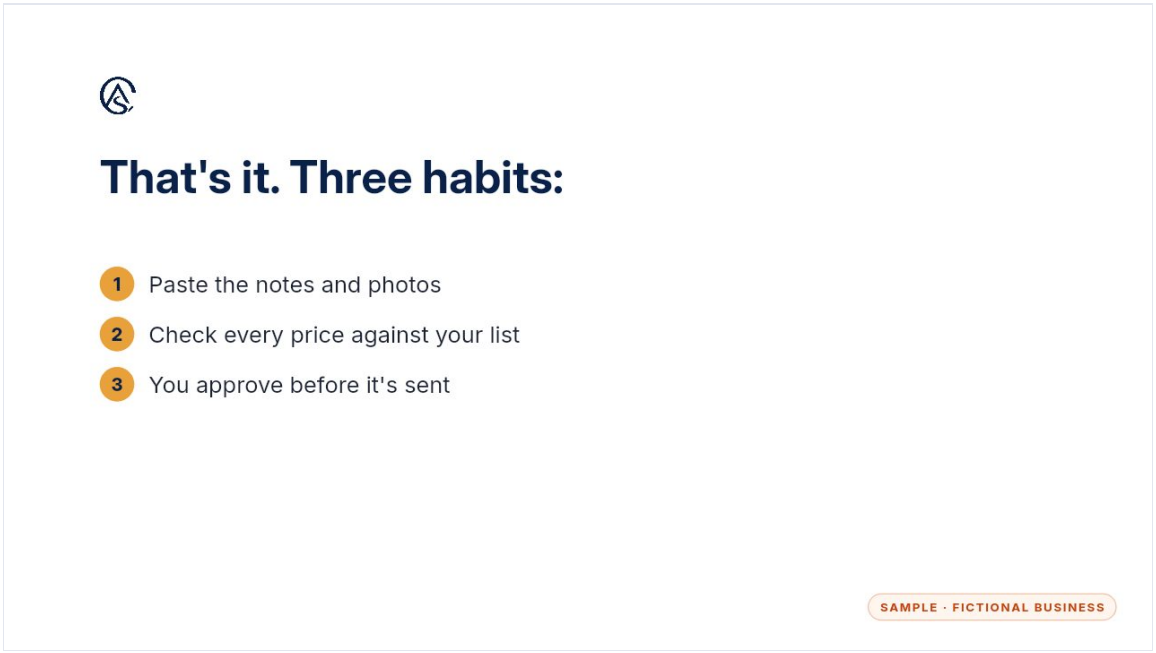
2 Paste the tech's notes into your quote assistant, and add photos if you have them. Short notes are fine: the size of the unit, what's failing, and what the customer wants.



3 It drafts good, better and best options, priced only from your own price list. If something isn't on the list, it says so instead of making up a price.



4 Ask why it recommends an option. It explains from the notes, so you can check its thinking, and change the recommendation if you know better.



5 Paste, check every price, and approve. Nothing goes out without you, and a good quote goes out the same day as the visit.