ESTIMATE FOLLOW-UP AUTOMATION · HANDOFF PACK

Faster quotes, and every one followed up.

Built for Brightline Heating & Air. Quotes drafted from your techs' notes and photos with your own price list, and unsigned quotes followed up by text and email.

01 Your setup at a glance
02 How quotes are written
03 Test report: 10 past jobs re-quoted
04 Ownership & access
05 30-day results
06 Keeping it current

Brightline Heating & Air

Prepared by Open Arm Solutions · Delivered October 2026

SAMPLE

01 · YOUR SETUP AT A GLANCE

Quotes are drafted from your notes and followed up for you.

Quotes drafted from your techs' notes and photos with your own price list, and unsigned quotes followed up by text and email.

3 h
Typical time to send a quote (was 2 days)

86
Price list lines loaded

3
Follow-ups per unsigned quote

80%
Past jobs matched first time

Where it's set up

TOOL	WHO USES IT	WHAT IT DOES	STATUS	LAST UPDATED
Quote drafting (ChatGPT project)	Office team	Turns tech notes and photos into Good / Better / Best quotes	Live	Nov 3, 2026
Email (Google Workspace)	Customers	Sends the quote and the day-5 follow-up	Live	Nov 3, 2026
Texting service	Customers	Sends the day-2 and day-10 follow-up texts	Live	Nov 3, 2026
Calendar	Office team	Books the installation the moment a quote is approved	Live	Nov 3, 2026

Price list last updated Nov 3, 2026.

How it works

01 — The tech's notes
Notes and photos; short is fine

→

02 — Draft from your prices
Good, better and best options

→

03 — A person approves
Nothing goes out without you

→

04 — Follow-ups until they reply
Day 2, 5 and 10; a reply or STOP ends them

Start using it today

1. Draft a quote

Paste the tech's notes and add the photos.

2. Update a price

Change the line in the price list.

3. Stop a follow-up

Reply to the customer, and it stops by itself.

02 · HOW QUOTES ARE WRITTEN

Your price list and your rules, on every quote.

Each rule says what the assistant does, how it reads on the quote, and when a quote waits for your review.

Good / Better / Best on every replacement

THE RULE

Every system replacement shows three options from the price list, with the 'Better' option recommended when it matches what the customer asked for.

HOW IT READS ON THE QUOTE

> *"Two-stage runs quieter and longer at low speed, which matches 'quieter and lower bills' without the cost of variable-speed."*

WAITS FOR YOUR REVIEW WHEN

The job needs a size or part that isn't on the price list.

NEVER SAY

A price that isn't on the price list, or that financing is approved.

Permit, disposal and line set

THE RULE

New systems always include the permit, inspection, pad and line set, and removal of the old system, as separate lines.

HOW IT READS ON THE QUOTE

> *"Removal & disposal of old R-22 system: $450. Permit, inspection, pad & line set: $950."*

WAITS FOR YOUR REVIEW WHEN

The tech notes say the ductwork needs work: it's added as a separate, priced option.

NEVER SAY

That the permit or disposal is optional on a replacement.

Also inside: Follow-up schedule, Repairs under $500, Discount rules, Financing note.

03 · TEST REPORT

We re-quoted 10 of your past jobs.

Each job was re-quoted from its original notes and photos, then set beside what you actually charged. 8 passed on the first run; the 2 misses were fixed and re-tested.

10	8	2	80%
Past jobs re-quoted	Passed first time	Fixed & re-tested	First-run pass rate

PAST JOB	DRAFTED VS. ACTUAL	PRICE LIST	RESULT
Job 1931 · Heat pump, 2.5-ton	First run left out the permit line. Now: $7,600 vs. $7,600.	Price list v3	Fixed
Job 2040 · Duct sealing add-on	First run used last year's price. Now: $650 vs. $650.	Price list v3	Fixed
Job 2047 · 3-ton AC, R-22, quieter	Drafted $8,400 (Better) vs. charged $8,400.	Price list v3	Pass
Job 1988 · Furnace + AC, 2,100 sq ft	Drafted $12,950 vs. charged $12,900 (within 1%).	Price list v3	Pass
Job 1902 · Mini-split, 2 zones	Drafted $5,850 vs. charged $5,850.	Price list v3	Pass
Job 2051 · Capacitor and contactor	Drafted $385 vs. charged $385.	Price list v3	Pass
Job 2032 · Blower motor	Drafted $720 vs. charged $735 (within 2%).	Price list v3	Pass

Showing 7 of 10, misses first. Every row is in your test report and your portal.

Results by topic



Match: within 2% of what was actually charged, with the same lines. Follow-ups were checked end to end on a test quote: text day 2, email day 5, text day 10, all stopped by a reply.

04 · OWNERSHIP & ACCESS

Your accounts and files are yours: each one, who owns it, and where it lives.

Every account is in your name. We have helper access only, and you can remove it any time without breaking anything.

WHAT	ACCOUNT OWNER	OUR ACCESS	WHERE TO FIND IT
Price list (master)	Brightline (Google Drive)	Editor, removable	Drive › Brightline AI › Price list
Quote drafting project	Brightline Team plan	None	ChatGPT › Projects › Quotes
Quote templates	Brightline (Google Drive)	Editor, removable	Drive › Brightline AI › Quotes
Texting service	Brightline, billed to your card	Admin, removable	Texting dashboard
Follow-up schedule	Brightline (Google Workspace)	Editor, removable	Gmail › Templates and schedule
Editable copies (Word, Google Docs)	Brightline	None	Portal › Files

Every file we handed over

FILE	FORMAT	WHERE IT IS
Price list (master)	Google Sheets + Excel	Drive › Brightline AI
Quote templates	Word + Google Docs	Drive › Brightline AI › Quotes

Also yours: the handoff pack, the test report, this sheet and the 30-day results report, each as a PDF and an editable Word file, in your portal.

If you ever leave

Everything keeps working. Remove our access where it says "removable". We delete our working copies 30 days after your plan ends.

Who to contact

hello@openarmsolutions.com or text (954) 821-2598. We usually reply the same business day.

05 · 30-DAY RESULTS

Your first month with Estimate Follow-Up Automation.

Illustrative numbers for a sample business. Your real report is built from your own logs 30 days after launch.

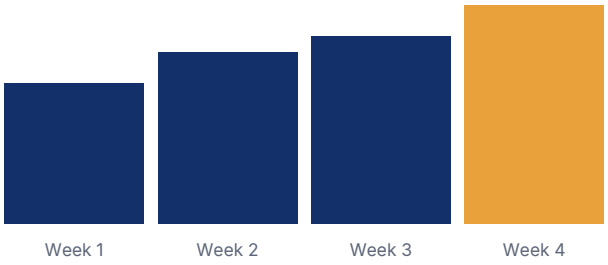
46
Quotes drafted and sent

61
Follow-ups sent

9
Signed after a follow-up

3 h
Typical time to send

Quotes sent per week



What was quoted

AC replacements	14
Repairs over $500	12
Furnace replacements	8
Duct work	6

What we changed & next month's plan

Added
Two price lines the techs used that weren't on the list.

Updated
Fall equipment prices, loaded the day they changed.

Next
A same-day 'thanks for having us' text after each estimate visit.

06 · KEEPING IT CURRENT

When something changes, it changes everywhere.

When prices, hours, services or policies change, these three steps keep every answer right.

MONTHLY MANAGEMENT

Active · renews Dec 2

Price and policy updates, fixes, and a monthly check with a short report. Text or email any change.

To request a change

1. **Text or email us** at (954) 821-2598 or hello@openarmsolutions.com: what changed and from when.
2. **We update it once** and every tool gets the new answer. On Monthly Management, small changes are included.
3. **We confirm** by reply, with a test quote using the change.

How-to guides

Draft a quote · 2 min

1. Paste the tech's notes and add the photos. 2. Check the three options and the lines. 3. Send it from your email.

Update a price · 1 min

1. Change the line in the price list. 2. Or text us and we do it. 3. New quotes use it at once.

Stop a follow-up · 1 min

1. Reply to the customer, and it stops by itself. 2. Or mark the quote 'paused'. 3. Text us to change the schedule.

Where things stand

STEP	DETAIL	STATUS
Setup questionnaire	Received Sep 24	Done
Price list loaded & 10 jobs re-quoted	Tested before handoff	Done
Follow-ups switched on	Live Oct 2	Done
30-day results report	Sent Nov 3	Done