SAMPLE JOB WALKTHROUGH

From photos and measurements to an estimate draft and follow-ups

EXAMPLE ONLY. The shop, customer, address, measurements and prices on this page are fictional and were made up for this demo. They are not real results or real prices.

1 · WHAT GOES IN

The rep's job

Estimate request email (subject `ESTIMATE REQUEST`):

`Replacement - Pat Sample - 123 Example Ln, Anytown`



MEASUREMENT REPORT	VALUE
Total area	26.4 squares
Pitch	6/12 (porch facet 2/12)
Eaves / rakes	142 ft / 96 ft
Ridges / valleys	48 ft / 32 ft
Stories	1

Rep notes: 2 layers to tear off. 3 pipe boots, 1 box vent. Decking soft near the chimney, maybe 2–3 sheets. Customer wants a price on impact-rated. Permit required.

2 · WHAT THE BOT DOES

Shingle Estimator

1. Checks the CRM so it doesn't duplicate a proposal.
2. Billable squares: 26.4 × 1.10 waste = 29.04 → **30 squares**.
3. Extra tear-off layer on actual squares: 27 sq.
4. Porch facet at 2/12: shingled with full ice & water, per the shop's low-slope rule.
5. Accessories from edge lengths: starter 238 LF, drip edge 238 LF, ridge cap 48 LF, ice & water about 702 sq ft.
6. Prices each tier from the shop's price sheet only.
7. Saves the proposal as a **draft** and reports to the owner.

Questions it raised instead of guessing:

Permit: no permit price on the sheet. What should I use for Anytown?

Decking: rep says 2–3 sheets. Showing $85/sheet "if needed" rather than adding it to the total. OK?

3 · WHAT COMES OUT

The estimate draft (customer copy)

Saved as a draft in the proposal tool for the rep to review. Nothing was sent.

Summit Example Roofing · Proposal for Pat Sample · 123 Example Ln, Anytown · Rep A

Roof: 26.4 squares, 6/12 with a 2/12 porch section, 2 existing layers, 1 story.

Scope of work: tear off both layers to the deck · inspect deck, replace soft sheets at the per-sheet price · synthetic underlayment · ice & water at eaves, valleys, penetrations and the full porch section · new drip edge · starter · shingles · ridge cap · ventilation as existing · 3 new pipe boots · cleanup and magnet sweep · disposal.

OPTION	PRODUCT	PRICE
Good	Good architectural shingle	$16,470
Better	Impact-rated architectural shingle	$18,870
Best	Class 4 designer shingle	$22,770
Add-on if needed: decking replacement		$85 / sheet
Permit		to be confirmed

Totals include 30 squares installed, the extra layer tear-off and disposal. Fictional example prices. Warranty, payment terms and expiration use the shop's own wording.

Internal sheet (never on the customer copy): 30 sq × tier $/sq, plus 27 sq × $60 extra layer = $1,620, plus $450 dumpster; quantity takeoff; open questions above.

4 · AFTER IT'S SENT

The follow-up sequence

The rep sends the proposal Monday, Nov 2 at 3:10 PM. The Follow-Up Bot drafts each check-in for the rep to approve. No prices, no pressure.

Tue, Nov 3 · Day 1 draft

Hi Pat, just making sure the roof proposal for 123 Example Ln came through. If you don't see it, check your spam folder or reply and I'll resend it.
Rep A, Summit Example Roofing

Thu, Nov 5 · Day 3 draft

Hi Pat, any questions on the materials or timeline in your proposal? Happy to walk through the options or adjust anything.

Fri, Nov 6 · Morning summary

Still unopened after 3 days: Pat Sample is on today's **call list**.

Mon, Nov 9 · Day 7 draft

Hi Pat, our schedule is starting to fill up. If you'd like, I can hold a spot for you, and you can sign right from the proposal whenever you're ready.

Tue, Nov 10 · Customer replies hold

"Can you call me about the impact shingles?" → The bot does **not** answer. It puts Pat on the call list and holds automatic follow-ups for 7 days. The Nov 16 check-in is skipped.