

Automation · Service guide

Quote & Proposal Writer

Professional quote drafts from your notes.

Your technician or salesperson sends notes, photos or a voice memo. A clean, branded quote or proposal draft is prepared for your review.

Message only

How it works	Draft sent by email or PDF
Best for	HVAC, Roofing
You stay in control	You approve every price and line before sending
First step	A short call with no obligation

How this helps

What it means for your business

Quotes get written at night, so good jobs can go cold during the day.

Customers get a clear message at the right time, and follow-up no longer depends on someone remembering. You decide what is sent, when it is sent and when it stops.

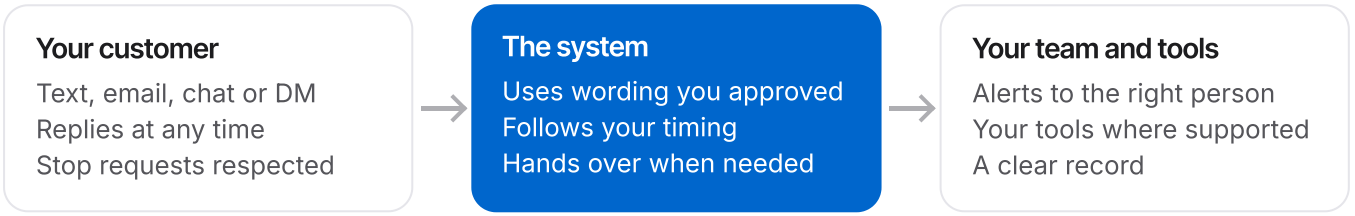
What you get

- Quotes can go out sooner
- Every quote looks professional and consistent
- Fewer mistakes from rushed paperwork
- More time on jobs, less on admin

What changes day to day

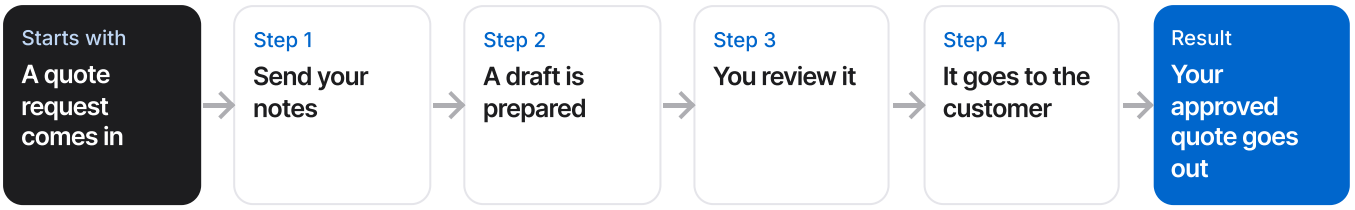
	Common today	With this service
Follow-up	Depends on who remembers	Runs on the rules you set
Wording	Written from scratch each time	Uses wording you approved
Timing	When someone gets a moment	Within the hours you choose
Replies	Scattered across inboxes	Passed to the right person
Visibility	Hard to see what was sent	A clear record of what went out

How it fits with your business



How it works

From start to finish



Step 1

Send your notes

A message, photos or a quick voice memo from site.

Step 2

A draft is prepared

Using your services, price list and terms.

Step 3

You review it

Check every line and price, edit anything.

Step 4

It goes to the customer

Branded, clear and ready to accept.

Example · Message scene

A technician finishes a site visit and sends a quick note with the details.

Draft sent by email or PDF

What happens next

You check every price and line, then send it to the customer.

Quote draft

Customer	The Patel family, 18 Oak Street
Work	Replace 50-gallon water heater, haul away old unit, new expansion tank
Price	From your price list
Valid until	30 days from issue
Status	Waiting for your approval

How easy it is

We do the heavy lifting

Most of the work happens on our side. You make the decisions, and we tell you exactly what we need.

What we handle

- Write the messages with you
- Connect your tools where supported
- Set the timing and the rules
- Test everything before it goes live
- Adjust the wording after launch

What you do

- Share your rules and examples
- Approve the messages
- Check the first sends
- Tell us what to change

Service levels

Start simple, go further when you are ready

Level 1

Draft mode

We prepare the messages and you approve them before they go out.

Level 2

Connected

Runs with your tools where supported, on the schedule you set.

Level 3

Advanced

More rules, several workflows working together, and reporting.

The right level is confirmed during discovery, based on your business and the tools you use.

What we need from you

- The wording and tone you want
- Access to the tools it needs to work with
- The customers or contacts it should reach
- Who on your team approves it

How we get started

1. A short call about your business
2. A clear plan and scope
3. Setup and testing with you
4. Go live with your approval

Why Calvyrn

Why businesses choose to work with us

Built for your business
Your rules, your wording and your tools. Not a one-size template.

You approve first
Nothing goes live until you have seen it and said yes.

Start small
Begin with one service or one first version, then add more if it helps.

One team
AI systems, automations, websites and web applications in one place.

Plain language
You always know what is being built, why, and what comes next.

Honest limits
We tell you what a system cannot do and where a person should stay involved.

You stay in control

- You approve every price and line before sending
- Prices come only from your own price list
- Your terms and branding on every quote

Questions you may have

Does it phone anyone?
No. This service works by message and makes no phone calls.

How long does it take to set up?
Most automations are live within one to two weeks of receiving what we need from you.

Do I need to change the tools I use?
Usually not. We work with the tools you already have wherever possible, and confirm this on our first call.

What if I want to stop?
Plans are month to month. You can pause or stop any automation.

Important notes

- Examples in this guide use fictional businesses, names and details.
- Results depend on your business, tools, customers and how the service is set up. We do not guarantee revenue, bookings or search rankings.
- AI can make mistakes. That is why approvals, clear limits and human hand-off are part of the setup.
- Features depend on your plan and on the tools you use. The final scope is confirmed during discovery and in your proposal.
- This guide is not legal, medical, tax or financial advice.

See how it would work for you
Tell us about your business. There is no obligation.

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