Upfront Restoration & Roofing AI Assistant Guide

Maximizing Your Partnership with Bubbles

Welcome to the Future of Construction Management!

Your AI assistant **Bubbles** isn't just another tool – it's your intelligent project partner that's about to revolutionize how you work. Think of Bubbles as your most dedicated team member who never sleeps, never forgets a detail, and is always ready to handle the administrative work that slows you down.

What makes this partnership so powerful?

Bubbles understands your sequential workflow system and can navigate through every phase of your projects – from Lead through Completion – with the same attention to detail you bring to every job. Instead of spending time clicking through systems, updating spreadsheets, and sending status emails, you can focus on what you do best: delivering exceptional restoration and roofing services.

How Bubbles transforms your workday:

For Field Teams: No more end-of-day paperwork marathons. Simply tell Bubbles what you've completed during the day, and it handles all the workflow updates, photo uploads, progress reports, and team notifications. Your voice becomes your most powerful productivity tool.

For Project Managers: Bubbles keeps every project moving forward by monitoring workflow bottlenecks, alerting the right team members at the right time, and ensuring nothing falls through the cracks. It's like having a project coordinator who tracks every detail across all your jobs simultaneously.

For Office Teams: Bubbles bridges the communication gap between field and office, ensuring real-time updates flow seamlessly through your organization. Everyone stays informed, deadlines are met, and client satisfaction soars.

The magic happens when you use the right prompts. This guide provides you with the exact language that helps Bubbles understand your intentions and take immediate action. These aren't just suggestions – they're your keys to unlocking unprecedented efficiency, accuracy, and team coordination.

Get ready to experience:

- **Time Freedom:** Let Bubbles handle routine tasks while you focus on high-value activities
- **Perfect Communication:** Never miss another update or deadline
- **Effortless Documentation:** Comprehensive project records without the paperwork burden
- **Predictive Insights:** Bubbles learns your patterns and helps optimize future projects
- **Team Harmony:** Everyone stays informed and aligned throughout every project phase

Your journey with Bubbles starts now. Use these prompts as your roadmap to building the most efficient, responsive, and profitable restoration and roofing operation you've ever imagined.

Workflow Sheet Specific Prompts

Phase Navigation & Management

- "Show me all incomplete line items in the current phase"
- "What's the next line item that needs to be completed before the phase can advance?"
- "Who is assigned to the current task in [phase name]?"
- "Check if we can move from [current phase] to [next phase] - are all line items complete?"
- "Alert the team when we're ready to advance to the next phase"

Line Item Management

- "Check off: [specific line item] and trigger alert for the next sequential task"
- "Mark '[line item name]' as complete and notify [next team member] their task is ready"
- "What line items are currently blocking progress in [phase name]?"
- "Show me which team member should receive the next automatic alert"
- "Update line item status and send notification to the designated person for the next task"

Sequential Task Flow Examples

For Lead Phase:

- "Complete 'Input Question Checklist answers' and alert next team member"
- "Check off 'Record property details' and move to next line item"
- "Mark Lead phase items complete and trigger Prospect phase alerts"

For Prospect Phase:

- "Complete 'Take site photos' and check off this line item"
- "Finish 'Complete inspection form' and alert estimating team"
- "Mark 'Present upgrade options' complete and move to Write Estimate section"

Automatic Alert Management

- "The system sent an alert for [line item] - confirm I'm ready to start this task"
- "I received the automatic alert for [task] - update my status to 'working on it'"
- "Complete my current task and trigger the next automatic alert in sequence"
- "Check who should get the next alert when I finish [current task]"
- "Override the automatic alert system - reassign [task] to [different team member]"

Section-Specific Task Management

- "Expand [section name] and show me all line items that need completion"
- "Within [section name], what's the next task in sequence?"
- "Complete all remaining tasks in [section name] and prepare for next section"
- "Add a new line item to [section name] and assign it to [team member]"
- "Check if [section name] can be marked complete or if tasks remain"

Phase Transition Alerts

- "Notify team that [phase name] is complete and [next phase] is starting"
- "Send alert that we're moving from Prospect to Approved phase"
- "Trigger automatic notifications for all team members involved in [next phase]"
- "Check if any team members need to be notified about the phase change"
- "Update project status dashboard to reflect new phase and alert stakeholders"

Blocking Task Resolution

- "Identify which line item is currently blocking phase progression"
- "Alert [team member] that their task is holding up the next phase"
- "Find alternative team member for the blocking task in [phase/section]"
- "Escalate: [line item] is overdue and blocking workflow progression"
- "Create emergency alert for critical path tasks that are delayed"

Cross-Phase Dependencies

- "Check if completing [current task] affects any future phase line items"
- "What tasks in upcoming phases depend on [current line item] being complete?"
- "Alert future phase team members about decisions made in current phase"
- "Update all dependent line items based on [current task] completion"
- "Notify downstream team members about changes that affect their future tasks"

Field Supervisor Daily Operations

Daily Workflow Updates

- "Check off [line item/task] as completed on the workflow sheet"
- "Mark [task name] as 50% complete and add note: [brief description]"
- "Update status: [task] is delayed due to [reason], new estimated completion [date]"
- "Log today's progress: completed [list tasks], currently working on [current task]"
- "End of day summary: update all workflow items I worked on today"

Document & Photo Management

- "I'm uploading [number] photos for [task/location], categorize and attach to workflow item [name]"
- "Take note: uploading daily progress report for [date] covering [tasks/areas]"
- "Attach this document to workflow item [name] and notify [team member] it's ready for review"
- "Upload and file: [document type] for [project phase/task] completed today"
- "Create photo log for today's work and send to project manager"

Real-Time Field Communication

- "Alert office team: we have an issue with [specific problem] at [location], need [resource/decision]"
- "Tell [team member name] that [task] is ready for their next step"
- "Notify project manager: [milestone] completed ahead of schedule"
- "Emergency alert: [safety/weather/equipment issue] requires immediate attention"
- "Update entire team: [significant progress/change/completion]"

Hands-Free Status Checks

- "What's my priority for tomorrow based on the workflow sequence?"
- "Are there any urgent messages or alerts I need to know about?"
- "What tasks are other team members working on that might affect my work?"
- "Check if [delivery/inspection/approval] is scheduled for this week"
- "Read me any new instructions or changes for [current task]"

End-of-Day Administrative Tasks

- "Process all my field updates from today and update the workflow sheet"
- "Send daily report to project manager with photos and progress notes"
- "Check off completed items and prepare tomorrow's task list"
- "Update time tracking for all workflow items I worked on today"
- "Send status updates to all team members who need to know about today's progress"

Field Issue Resolution

- "Log this problem: [describe issue] and suggest who should handle it"
- "Create work order for [repair/additional work needed]"
- "Document change order request: [description] affects [workflow items]"
- "Report delay: [task] pushed back due to [reason], update dependent tasks"
- "Escalate to project manager: [issue] needs decision before I can proceed"

Resource & Coordination Requests

- "Check if [materials/equipment] will be delivered as scheduled for [task]"
- "Request [resource] for tomorrow's work on [workflow item]"
- "Coordinate with [subcontractor] about [upcoming task] timing"
- "Verify that [inspection/approval] is scheduled before [dependent task]"
- "Alert procurement: need [materials] by [date] for [workflow item]"

Voice Assistant Operations (Hands-Free)

Quick Voice Updates

- "Quick update: completed [task], starting [next task]"
- "Voice note: encountered issue with [task], need help from [team member]"
- "Log: [brief description of work completed today]"
- "Alert team: [urgent update or blocker]"
- "Voice memo: [important observation/concern] for follow-up"

Field-to-Office Communication

- "Call in update: [progress description] and send to [specific team member]"
- "Voice message to office: [information/request] needs response today"
- "Dictate daily report: [describe today's activities and progress]"
- "Record and send: [detailed explanation] of current situation"
- "Voice alert: [time-sensitive information] for immediate action"

Hands-Free Monitoring

- "While I'm working, monitor for any urgent alerts or messages"
- "Read me the next three tasks in the workflow sequence"
- "Take notes as I describe the current task progress"
- "Set a reminder to check on [specific item] in [time period]"
- "Listen for calls or messages from [specific team member] about [topic]"

Project Navigation & Status

Daily Check-ins

- "Show me today's priority tasks for my role in [project name]"
- "What workflow items are overdue or need immediate attention?"
- "Update me on the current project phase and what's coming next"
- "Are there any blockers preventing progress on current tasks?"
- "Which team members need input from me today?"

Workflow Management

- "Mark task [task name] as complete and move to the next sequential item"
- "What are the dependencies for task [task name] before I can start?"
- "Show me all tasks assigned to me across all active projects"
- "What's the next logical task in the workflow after completing [current task]?"
- "Are there any workflow items that can be done in parallel?"

Project Communication

Message Management

- "Send an update to the team about completion of [specific task]"
- "Alert [team member name] that their input is needed for [task/decision]"
- "Create a summary of today's progress for the project manager"
- "Draft a message requesting clarification on [specific workflow item]"
- "Send reminders to team members with overdue tasks"

Alert Handling

- "Show me all active alerts for my projects and prioritize them"
- "Create an alert for the team when [specific milestone] is reached"
- "What triggered the recent alert for [project name]?"
- "Clear resolved alerts and update project status"
- "Set up automatic alerts for when we enter the next project phase"

Team Coordination

Assignment & Delegation

- "Who should be assigned to [upcoming task] based on skills and availability?"
- "Reassign [task name] from [person A] to [person B] and notify both"
- "What tasks can be delegated to other team members to speed up progress?"
- "Check if [team member] has bandwidth for additional tasks"
- "Balance workload across team members for this project phase"

Progress Tracking

- "Generate a progress report for the current project phase"
- "Compare actual timeline vs. planned timeline for current phase"
- "Identify bottlenecks in the current workflow sequence"
- "What percentage of the current phase is complete?"
- "Predict completion date based on current progress rate"

Quality Control & Documentation

Verification & Compliance

- "Check if all required documentation is complete for [task/phase]"
- "Verify that [completed task] meets project specifications"
- "Are there any compliance requirements for the current workflow items?"
- "Review and validate completed work before marking tasks done"
- "Ensure all stakeholder approvals are obtained for [milestone]"

Record Keeping

- "Document the completion details for [task name]"
- "Create a log entry for [issue/change/decision]"
- "Update project records with today's progress"
- "Generate documentation for the completed phase"
- "Maintain audit trail for all workflow changes"

Problem-Solving & Decision Support

Issue Resolution

- "Analyze the impact of [delay/issue] on the overall project timeline"
- "Suggest solutions for the bottleneck at [workflow step]"
- "What are alternative approaches if [planned task] can't be completed?"
- "Help troubleshoot why [task] is taking longer than expected"
- "Escalate [issue] to appropriate team members or management"

Resource Management

- "Check resource availability for upcoming workflow items"
- "Optimize resource allocation for the current project phase"
- "Identify if additional resources are needed for [specific tasks]"
- "Suggest cost-effective alternatives for [expensive task/resource]"
- "Plan resource scheduling for the next project phase"

Advanced System Integration

Multi-Project Management

- "Show me workflow conflicts across all my active projects"
- "Balance my time across multiple projects based on priorities"
- "Identify opportunities to share resources between projects"
- "Coordinate workflows when projects have overlapping team members"
- "Generate a master schedule combining all project workflows"

Predictive & Analytics

- "Analyze patterns from past projects to optimize current workflow"
- "Predict potential delays based on current progress rate"
- "Identify which workflow items typically cause bottlenecks"
- "Suggest improvements to the sequential workflow based on data"
- "Generate insights on team performance and efficiency"

Training & System Learning

System Learning

- "Explain how the workflow sequence works for [project type]"
- "Show me best practices for using this project management system"
- "What are common mistakes to avoid in the workflow process?"
- "Walk me through the complete lifecycle of a typical project"

AI Assistant Training

- "Learn from this completed task to help with similar future tasks"
- "Remember my preferences for how I like to receive project updates"
- "Note the successful approach we used for [specific challenge]"
- "Save this workflow optimization for future similar projects"

Tips for Effective AI Prompt Usage

Best Practices

1. **Be Specific**: Include project names, task names, and team member names when relevant
2. **Use Context**: Reference the current phase, workflow step, or project status
3. **Think Sequential**: Remember that tasks often have dependencies in the workflow
4. **Communicate Changes**: Always ensure the AI notifies relevant team members of updates
5. **Maintain Records**: Use prompts that document decisions and progress for future reference
6. **Plan Ahead**: Ask the AI to help prepare for upcoming phases and potential challenges

System Integration

Bubbles is designed to work seamlessly within your sequential workflow system, so always frame requests in the context of where you are in the project lifecycle and what the next logical steps should be. The system automatically alerts designated team members when their tasks are ready, and Bubbles can help manage this flow effortlessly.

Voice Assistant Optimization

For field work, use shorter, direct prompts that can be easily spoken while working. Bubbles excels at handling administrative tasks that would normally require logging into the system later, giving you more time to focus on quality workmanship.