

SOLVEWORKS

AI Automation Proposal for **Ace Upholstery**

Respond faster. Quote smarter. Get back to the craft.

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Prepared for: Taura — Ace Upholstery

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What We Heard

From our conversation with Taura about Ace Upholstery

Ace Upholstery is a trusted Halifax-area shop handling both **residential and commercial upholstery**, plus marine work that ramps up every boat show season. You came in to modernize a mom-and-pop operation, and you've done that — QuickBooks for estimates, MaintainX for job scheduling, a website with a quote request form, and an SEO provider driving traffic. The foundation is solid.

The problem isn't your tools — it's the **15+ hours a week** you're spending on the back-and-forth. Around 10 quote requests come in every day, and almost every one requires you to reply asking for photos and dimensions before you can even start quoting. After a client accepts an estimate, you're manually reaching out to book fabric appointments. When a job's done, you're contacting the client to arrange pickup or delivery. It's a lot of admin for a team that should be focused on the craft.

You told us the most important thing: **you never want it to feel robotic**. Your clients choose Ace because of the personal touch, and that can't be lost. Everything we're proposing is designed to keep that warmth while eliminating the repetitive work that's eating your days.

~200

Quote requests per month
most needing photos &
dimensions

15+hrs

Per week on emails,
scheduling & follow-ups

1-2 days

Current response time
when things get busy

* Based on numbers shared during our discovery call with Taura.

What We'll Build

Three automations targeting the exact pain points you described



Smart Quote Request Intake

Eliminate the back-and-forth before you can even quote

Right now, almost every quote request requires a follow-up asking for photos and dimensions. This agent handles that automatically. When a request comes in — whether from your website form, email, or phone — the customer gets a **friendly, immediate response** that guides them to submit photos and measurements upfront. No more chasing. By the time you see the request, it's ready to quote.

Instant response to inquiries

Auto-collects photos & dimensions

Warm, personal tone

Works 24/7



Post-Quote Fabric Booking

When they accept, the next step happens automatically

When a client accepts their estimate in QuickBooks, the system detects it and **automatically sends a friendly message to book their fabric appointment** via Calendly. No manual follow-up, no delay. The client gets a seamless experience — they accept the quote and immediately get to pick a time to choose their fabric. You just see a booked appointment on your calendar.

Triggered by QuickBooks acceptance

Calendly integration

Zero manual follow-up



Job Completion & Pickup/Delivery

Finished the job? The client already knows.

When a job is marked complete in MaintainX, the customer is **automatically contacted to arrange pickup or delivery**. They get a friendly message with options — and can confirm a time without you picking up the phone. This closes the loop on every job without adding to your to-do list.

Triggered by MaintainX completion

Pickup or delivery scheduling

Automatic client notification



Mission Control Dashboard

Your entire business at a glance — one screen, real-time

A custom-built dashboard designed specifically for Ace Upholstery. See **revenue, tasks, inventory, and team activity** in one place. Track jobs from quote to completion, monitor what's in progress, what's waiting, and what's done. Drag tasks between columns. View AI-generated meeting summaries. No logging into five different tools — everything your business needs to run, on one screen.

How It All Connects

Your current workflow, automated end-to-end

These three automations map directly to the workflow you described. Here's how your day changes:

1. Customer fills out web form or calls → **Agent responds instantly**, collects photos & dimensions
2. You get a complete request — photos, dimensions, details — ready to quote
3. You build the estimate in QuickBooks and send it
4. Client accepts → **Agent automatically sends Calendly link** to book fabric appointment
5. Fabric chosen, ordered. Job scheduled in MaintainX
6. Job completed in MaintainX → **Agent contacts client** to arrange pickup or delivery

Steps 1, 4, and 6 are where your 15+ hours of weekly admin lives. Those become automatic. **You still build the quotes. You still choose the fabrics with your clients. You still do the craft.** The agent just handles the scheduling, the follow-ups, and the back-and-forth.

Still Personal, Never Robotic

Every automated message is written in Ace's voice — friendly, warm, professional. We work with you to get the tone exactly right. Your clients will feel like they're talking to your team, not a machine. **If it doesn't feel like Ace, we don't ship it.**

How You'll Use It

No dashboards. No complex software. Just text your agent like you'd text a team member.

The phone screen displays a text message from 'TAURA' asking about quote requests. The agent replies with a detailed update on pending photos and job status. The user then asks if an estimate was accepted, and the agent confirms it was accepted at 2:15 PM.

Today • via Telegram

TAURA
How many quote requests came in today?

YOUR AGENT
12 so far today. 9 already have photos and dimensions — ready for you to quote. 3 are still pending photos, I've sent them a friendly follow-up. Also, the Henderson sofa job was marked complete in MaintainX — I've messaged them about pickup and they confirmed tomorrow at 10 AM.

TAURA
Nice. Did the Macintosh estimate get accepted?

YOUR AGENT
Yes — accepted at 2:15 PM. I already sent them the Calendly link for a fabric appointment. They booked Thursday at 11 AM. ✓

**Text-based**

Works on any phone, any time — Telegram or WhatsApp

**Remembers everything**

Knows your clients, jobs, and where every request stands

**Available 24/7**

Responds to customers even during boat show season crunch

**Private and secure**

Your data stays yours — always

Beyond What You Asked For

Capabilities we'd include to make the agent even more powerful

These aren't upsells — they're things we'd build into your system because they make sense for how Ace operates.

Morning Briefing

Start every day with a quick summary: how many new quote requests came in overnight, which estimates are pending acceptance, which jobs are completing today, and any clients who need follow-up. **Your entire day's priorities in one glance.**

Lead Tracking & Conversion Insights

You mentioned you have no idea how many leads go unanswered. The agent tracks every inquiry from first contact to closed job — so you'll finally see your **true close rate, average response time, and where leads drop off**.

Smart Reminders for Kaylee & Team

Kaylee handles commercial quoting and fabric ordering. The agent can send her **automatic reminders when fabric orders need placing, when commercial quotes are overdue for follow-up**, or when a job is approaching its scheduled start date.

Post-Job Review Requests

After pickup or delivery is confirmed, automatically send a **friendly review request**. More 5-star reviews, less manual asking — builds your online reputation while you focus on the next job.

Why These Matter

At ~200 quote requests per month with a 50% close rate and average tickets of \$1,500–\$5,000, even a small improvement in response time or follow-up consistency can mean **tens of thousands in recovered revenue**. These extras help you capture what's already coming through your door.

How It Works

From kickoff to fully operational in weeks, not months

1

WEEK 1 — DISCOVERY

Deep Dive Into Your Workflow

We map your exact process — from web form submissions to QuickBooks estimates to MaintainX job tracking. We learn how Taura handles residential, how Kaylee handles commercial, and nail down the tone and language that feels like Ace. We connect to QuickBooks, MaintainX, Calendly, and your website.

2

WEEKS 2–3 — BUILD

Configure & Customize

We build the three core automations: smart quote intake, post-acceptance fabric booking, and job completion notifications. Every message template gets reviewed with you until the tone is exactly right — friendly, personal, and unmistakably Ace.

3

WEEK 4 — DEPLOY

Go Live with Support

We launch with you watching. A test quote request comes in, gets an instant response, collects photos — you see it working in real-time. We make sure you and Kaylee are comfortable before stepping back. Your admin assistant can be onboarded when she returns in March.

4

ONGOING — OPTIMIZE

Refine & Improve

We monitor performance, refine responses based on real customer interactions, and continuously improve. As boat show season ramps up and marine requests surge, the system adapts with you.

4wks

From kickoff to
fully operational

Easy

Works with the tools
you already use

∞

Ongoing support &
continuous improvement

Your Investment

Simple pricing. No surprises. Cancel anytime.

\$1,500

One-time setup — discovery, build, deploy & onboarding

RECOMMENDED

YOUR OWN AI ACCOUNT

\$250

/month

You manage your own Anthropic account

- ✓ All three core automations
- ✓ Bonus features included
- ✓ Ongoing optimization & support
- ✓ QuickBooks + MaintainX + Calendly integrations
- ✓ You control your own AI usage & billing

Best for hands-on teams

WE HANDLE EVERYTHING

\$450

/month

AI runs on our managed Anthropic account

- ✓ All three core automations
- ✓ Bonus features included
- ✓ Ongoing optimization & support
- ✓ QuickBooks + MaintainX + Calendly integrations
- ✓ AI usage included — nothing else to manage
- ✓ We handle all technical details

Set it and forget it

Both options include the same features and same level of support.

The only difference is whether you want to manage your own AI account or have us handle it.

No long-term contracts. Cancel anytime.

SOLVWORKS

Let's get you back to the craft.

You're spending 15+ hours a week on admin that should take zero. Let's fix that — before boat show season gets any busier.

Let's Get Started →

calendly.com/brody1schofield/30min

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