Garage Floor Marketing
A DIVISION OF USDURALAST
CRM built for floor coating contractors

LEAD SYSTEM GUIDE

Every lead, from cold call to signed contract.

The CRM is built around one workflow: a lead enters the pipeline, you send a bid, the customer signs, the job runs, you get a review. This guide walks each step and explains what the system does for you in the background.

4	3 taps	5	0
WAYS TO CREATE A LEAD	LEAD TO SIGNED BID	THINGS FIRE ON SIGN	MANUAL FOLLOW-UPS

One mental model

A **Lead** is a person plus a property plus a job they want done. It moves through stages: New, Contacted, Quoted, Scheduled, Won (or Lost). When it hits Won, it becomes a Sale automatically. Everything else is automation.

Four ways to spawn a lead. Pick the fastest.

All four land in the same place: Pipeline → New stage. Use whichever fits the situation.

1 From the FAB (the + button)

Bottom-right floating "+" on any screen. One-page form. Type their name, address (autocomplete), square footage, coating type. Price calculates as you type. Save.

2 Voice dictation from the truck

On the new-lead form, tap the mic icon. Talk through the call ("Sarah Smith, 4023 Elm Street, 600 square feet, wants polyaspartic flake, dog and toddler, prefers earth tones"). Claude parses it and fills every field. Tap Save.

3 Scan a business card at a trade show

Pipeline → "Scan card" → snap the photo. Contact, phone, email, company, title are saved. Confirm to create the lead.

4 Inbound: phone, web form, social DM

Calls handled by the AI Phone Receptionist become leads automatically with the call transcript attached. Web form submissions from your /funnels pages also create leads with the source tagged. So do Facebook/Instagram lead-form responses if you have GHL connected.

Tip: Take photos at the bid walkthrough.

On the lead detail, tap "Add photos" and snap before-condition shots from your phone. They attach to the lead, show up on the customer portal under "Before photos," and stay on the job record after install for your warranty file.

The CRM does the math. You handle the override.

Pricing is automatic the moment you enter square footage. Your defaults set the baseline. Coating presets override per material. You can override any line on any job.

A Auto-price from defaults

Per-sqft rate × sqft. Plus stairs (per step), vertical surfaces (per linear foot), and repair line items. All from Settings → Brand & defaults.

B Coating preset override

Pick "Polyaspartic Flake" from the coating dropdown and the per-sqft jumps to your polyaspartic price. Pick "Epoxy Solid" and it drops. Per-preset rates win over the default.

C Discount ($ or %)

Promo running? Type $200 or 10% in the discount field. Bid total updates instantly. Reports treat the post-discount number as the real win.

D Custom line items

Need to add "Crack repair $300" or "Floor prep $150"? Hit "Add line." Description and amount. Stacked on the bid PDF.

$ Cost & margin in real time

As you build the bid, the system tracks materials cost (from your coating presets), labor cost (rate × estimated hours), and margin. It shows on the lead detail in green when you're above your floor. If your margin drops below threshold, the lead glows red and you'll see a "below margin" warning before you send.

STEP 3 · SEND IT

One tap. Customer sees it in 5 seconds.

From the lead detail, tap "Send proposal." The customer gets a text with a one-tap portal link. No login, no password, no email needed.

SMS bid (default)

Your branded template ("Hi {firstName}, here's your bid for the {address} project, $4,500 total. Tap below to view, pick your color, and sign on your phone.") plus the portal link. Sender shows as your business name.

Email bid (optional, alongside SMS)

Same template, more detail, full PDF attached. Goes from your sending domain (e.g. noreply@yourshop.com) so your customer sees your brand, not ours.

What the customer sees on the portal

1. **Your installer card**: photo, name, phone, "text installer" button.
2. **Project summary**: address, coating, sqft, total price.
3. **Color picker**: their selected flake blend (or live custom-blend builder for custom orders).
4. **Before photos** if you uploaded them, plus example after photos.
5. **Bid line items** and total.
6. **Sign & agree** button. Finger-paint signature on their phone. Date stamped.
7. **"What happens next"** panel that updates the moment they sign.

No app to download. No password to remember.

The portal is just a web page tied to a one-time token. The link in their text is enough.

STEP 4 · WHAT HAPPENS WHEN THEY SIGN

Five things fire automatically. You do zero.

The instant the customer taps "I agree" on the portal, the system runs the post-sign sequence. You'll see all five reflected on the lead detail timeline.

1 Lead flipped to WON, Sale record created

Status change logged, revenue counts toward your monthly report immediately. Pipeline cleans itself up.

2 Customer confirmation email

"Thanks for signing! Here's what happens next..." with timeline (deposit invoice, scheduling, install day, walkthrough). Branded to your business.

3 Deposit invoice via Stripe Connect

If you've connected Stripe Connect, a deposit invoice is generated and emailed. Customer pays from their phone, ACH or card, money lands in your bank account directly (we never touch it).

4 Rep SMS notification

The rep that owns the lead gets a text: "Sarah Smith just signed your bid for $4,500." So they know to call her to schedule.

5 "What happens next" portal panel

The customer portal page they signed on now shows a green checkmark and a schedule of what's coming. Reduces "did it go through?" calls.

Follow-ups, AI Closer, and the review request.

After the bid is out, the CRM keeps working without you. Three systems run in the background.

A Auto follow-up sequences

Customer didn't reply in 48 hours? An SMS goes out asking if they had questions. Still nothing in 5 days? A second email with the proposal goes out. Per-org thresholds, TCPA quiet hours respected. Set sequences in Settings → Communications → Workflows. Or just leave the defaults on.

AI The AI Closer (your secret weapon)

Background AI watching every lead. Picks up signals: customer opened the portal three times but didn't sign, asked about color in a text, mentioned a competitor's price. Drafts a personalized SMS or email play for you, sends a notification: "Here's what I think you should send Sarah today." You review with one tap, approve, send. Or skip.

Daily 7 am digest: an email landing in your inbox every morning at 7am local time, summarizing what plays the AI is suggesting that day, ranked by lead value.

5☆ Review Magnet after install

Mark the job complete on the schedule and the system texts the customer an hour later asking how it went. 5-star ratings get a button straight to your Google Business Profile. 4 or below? Routed to your inbox first so you can fix it before it becomes a public review.

Stuff that lives behind the obvious buttons.

Pull these out when you need them. Most users discover them by month two and wonder how they lived without them.

Flake catalog with favorites

317 flake colors scraped from AGF. Filter by region. Heart your top 12 for one-tap selection on the new-lead form.

Custom blend builder

Mix up to 12 flakes for a custom finish. Live preview canvas. The blend renders on the customer portal so they see exactly what they're getting.

Contract template

Upload your standard contract once. Every won lead auto-fills it (customer name, address, scope, price, date). Customer signs the contract on the portal.

Photo-to-estimate AI

Customer sends a garage photo. Tap "AI estimate." Claude looks at the photo, estimates square footage and condition, drafts a rough bid for you to refine.

"My route today" map

See every scheduled job and lead on a map. Optimize your driving order. Tap any pin to open the lead.

Change order requests

Customer can request a scope or color change from the portal after signing. You approve or reject. Pricing adjusts. Both sides stay in sync.

Voice-recorded sales calls

Record yourself on a sales call. AI summarizes what went well, what to follow up on, sends you a coaching email.

Service agreements

Sell annual maintenance plans. The system tracks renewal dates and texts the customer 30 days before renewal.

THE FULL PICTURE

One lead. Six minutes of your time. Everything else, automatic.

Three minutes to create the lead and send the bid. Three minutes to schedule the install when they sign. The system handles every email, text, invoice, photo upload, review ask, follow-up, and report in between.

Open the pipeline at garagefloor.marketing

Where to learn more

Settings → Account → How to use this app opens a full walkthrough. Settings → Communications → Workflows shows every automation that's running, with sliders to tweak it.

Built by floor coating operators, for floor coating operators.

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