

PRODUCT WORKFLOW STUDY

From technician recommendation to approved quote and scheduled work

A commercial service workflow showing how Corexa can preserve technical scope, present a clear quote, capture customer approval or deposit and return the accepted work to operations.

Evidence level stated clearly throughout

Repository-reviewed

Capability basis

Quote-linked

Commercial context

Customer approval

Decision point

Pilot required

Outcome standard



THE CHALLENGE

Why the existing process breaks down

Additional work is often discovered during diagnosis. If the technician recommendation, quote, customer decision and future job are managed in separate systems, the business risks losing scope, delaying approval or performing work without a reliable commercial record.

01

Technical scope loses detail

The diagnosis is shortened as it moves from technician notes into an email or accounting description.

02

Quotes sit outside the job

The office cannot easily see which service event or machine created the quote.

03

Options are difficult to compare

Repair, replacement or staged work may be explained informally without a consistent package view.

04

Approval is ambiguous

A verbal yes, email response and paid deposit can create different interpretations of whether work is authorised.

05

Accepted work is not scheduled

A quote can be approved but remain disconnected from technician allocation and the next visit.

06

Versions become confused

Revisions, expiry dates and superseded scope can lead staff or customers to reference the wrong amount.

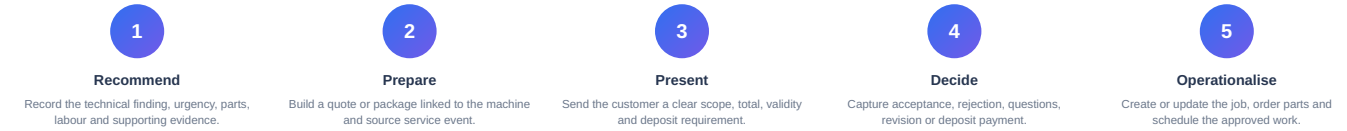
The central risk

The customer decision is separated from the technical reason for the work, leaving the business exposed to delay, dispute or incomplete delivery.

THE OPERATING MODEL

A connected workflow around the machine

Corexa can keep the recommendation, machine, source job, quote line items, customer status and accepted next step connected. The quote becomes an operational decision record rather than a standalone document.



COREXA CAPABILITY	OPERATIONAL CHANGE	WHY IT MATTERS
Job-linked quote	Associates the quote with the job, customer and machine context.	Staff can see why the quote exists and which asset will receive the work.
Structured line items	Separates parts, labour, call-out and other scope elements.	The customer and office receive a clearer commercial breakdown.
Quote packages and comparison	Supports alternative packages or scope choices where applicable.	Customers can compare realistic options instead of interpreting an informal explanation.
Customer quote view	Displays amount, date, status and deposit information in the customer experience.	The decision point is visible and traceable.
Approval workflow	Records acceptance, rejection or requested changes.	The business can distinguish a sent quote from authorised work.
Deposit context	Tracks required and paid deposit information beside the quote or job.	Scheduling and purchasing can follow a defined commercial condition.

CREDIBILITY STANDARD

What is supported - and what is not yet claimed

A credible case study distinguishes repository evidence, real workflow scope and future outcome hypotheses. The evidence level below is deliberately explicit.

✓ Repository capability

The repository includes job quote hooks, customer quote cards, quote creation dialogs, packages, comparison views, approvals and deposit-related fields.

✓ Connected scope

Quote information is represented in relation to jobs and customer decisions rather than only as an accounting export.

✓ Credible limitation

This study does not claim improved acceptance or revenue. Those outcomes depend on pricing, customer mix, scope quality and follow-up.

✓ Pilot requirement

A quote cohort should be measured from diagnosis through approval, deposit and scheduled delivery.

Not yet claimed: this case study does not present a measured productivity, revenue, accuracy or customer-satisfaction improvement. A controlled baseline and participant-approved result are required before those claims are published.

Measurement plan for the publishable version

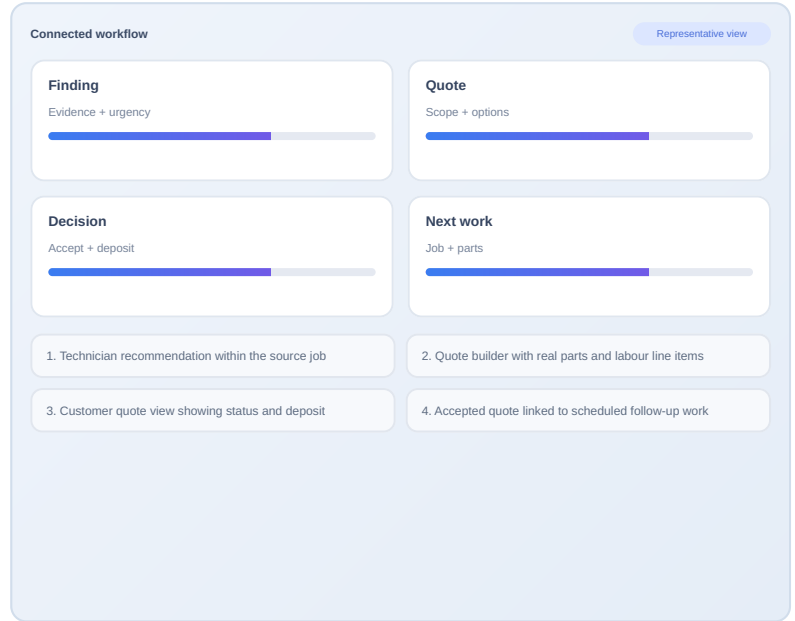
MEASURE	EVIDENCE SOURCE	CREDIBLE REPORTING
Diagnosis-to-quote time	Job and quote timestamps	Median elapsed time from documented recommendation to quote sent.
Approval turnaround	Quote status history	Median time from quote sent to customer decision.
Quote acceptance rate	Quote register	Accepted quotes as a percentage of decided quotes, segmented by type.
Revision frequency	Quote versions	Average revisions per quote and common reasons for change.
Deposit collection	Payment records	Percentage of deposit-required quotes paid before scheduling or purchasing.
Approved work conversion	Quote and job links	Percentage of accepted quotes converted into a scheduled or active job.

"The quote should preserve the technician's reason for the work and create the next operational action after the customer decides."

MAKE THE STORY TANGIBLE

Show the complete decision path, not just the PDF quote

Use screens that prove the recommendation remains connected from the source job to the customer decision and back into scheduled work. Include an actual status transition and line-item detail.



Recommended evidence-building sequence

Phase 1 - Baseline

Review a recent quote sample for delays, missing scope, revisions and accepted work that was not scheduled.

Phase 2 - Controlled use

Run all additional-work quotes for a selected customer or technician through the connected workflow.

Phase 3 - Verified result

Publish turnaround, acceptance, revision and conversion data with a customer-approved quotation.

Build the publishable proof layer

Replace representative views with dated interface screenshots, a defined baseline, system-derived measures and an approved participant quotation.

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Publication note: capability descriptions are based on the Corexa repository supplied in July 2026. Confirm the deployed workflow, permissions, integrations and data quality before presenting a capability as a completed customer outcome.