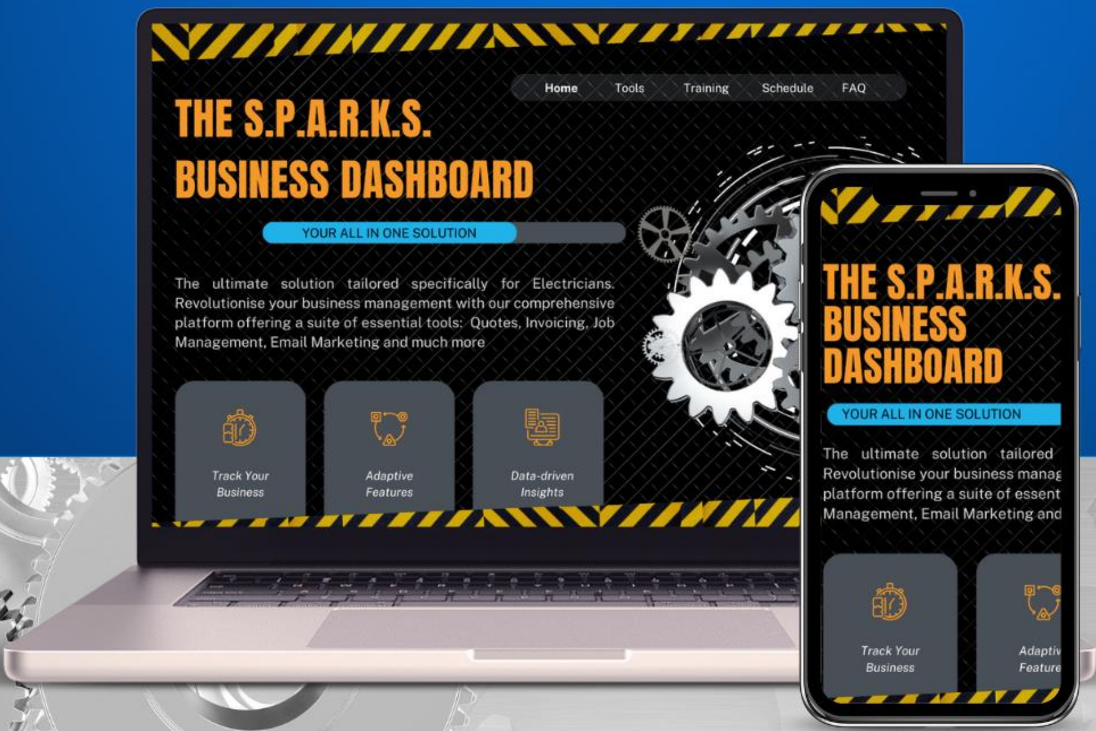
THE S.P.A.R.K.S. BUSINESS DASHBOARD



WORKBOOK

Day 1 Task 1

JAMES DEWANE
Helping Electricians Attract and Keep More Customers

Key Points

First of all, I want to welcome you to this Five-Day S.P.A.R.K.S Business Dashboard (SBD) Sprint.

Before we kick things off, make sure you're registered and have access to your SBD account.

Over the next five days, we'll dive into hands-on learning and practical tasks designed to help you master the essentials of the S.P.A.R.K.S Business Dashboard. By the end of the Sprint, you'll know how to use the Dashboard to simplify your workflow and streamline your business.

Each Morning **At 6AM** the Task for that Day will be posted in the SBD Group; each task is accompanied by an explanatory Video and a PDF Task Sheet.

At 15:00 Each Day I will Post an AMA (ask me anything) post to the SBD Group – You will post your Questions related to that day's tasks ONLY, below this post.

At 19:30 Each Evening, I will be Live in the SBD Group answering your Questions.

Task 1 Day 1

Adding Contacts (Manually and in Bulk)

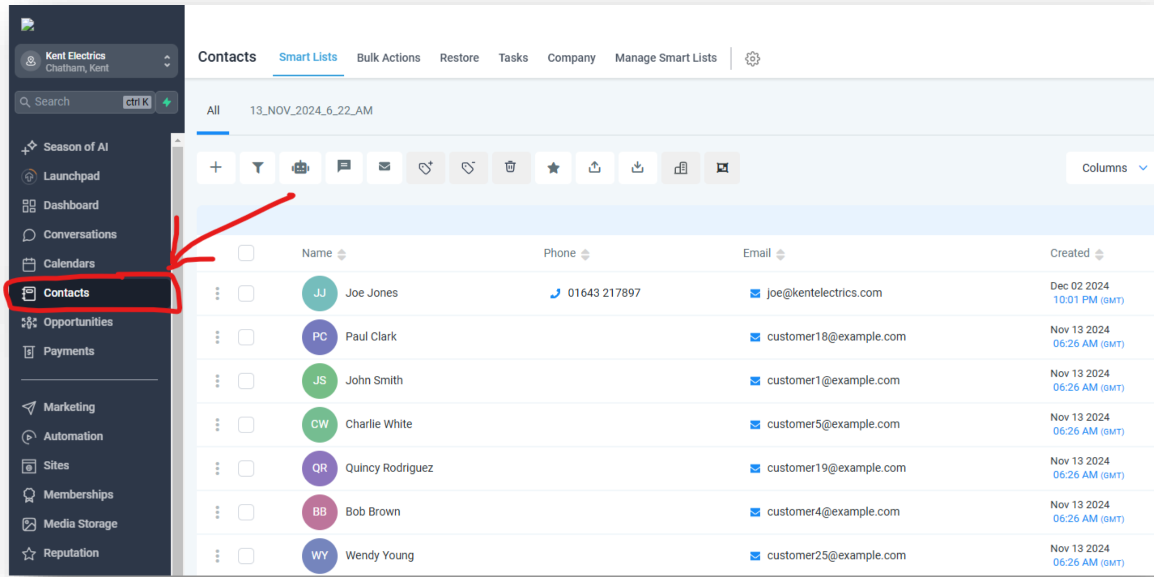
Section 1: Adding a Contact Manually

Follow these steps to add a single contact:

1. **Log In**
   Open the S.P.A.R.K.S Business Dashboard on your device and log in with your credentials.

2. **Navigate to the Contacts Tab**

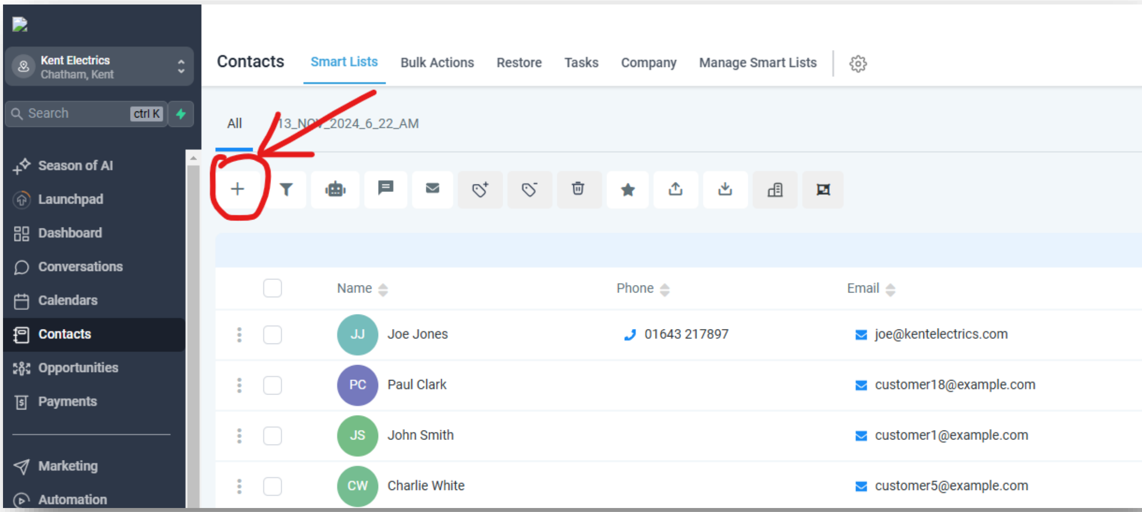
   - *On a Laptop/Desktop*: Click Contacts in the menu on the left-hand side.
   - *On a Smartphone/Tablet:* Tap the hamburger menu (three lines) in the top-left corner, then tap Contacts.



3. **Add a Contact**

   Look for the Add Contact button:

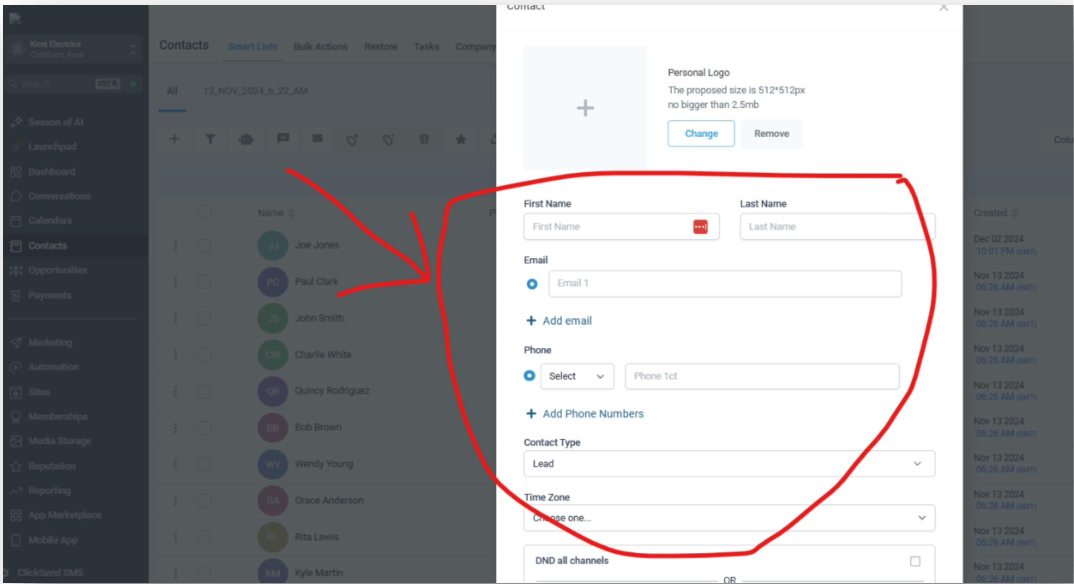
   - *On a Laptop/Desktop:* It's usually at the top-left corner (+Sign).
   - *On a Smartphone/Tablet:* It might be a + button at the bottom or top of the screen.



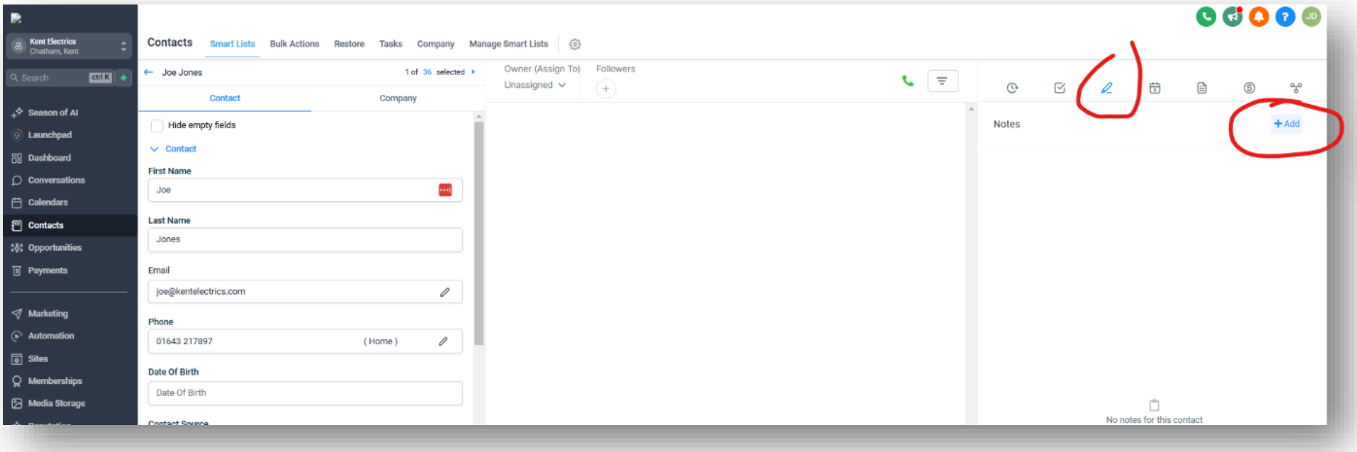
4. Enter Contact Details

Fill out the form with the following details:

- First Name: Enter the customer's first name.
- Last Name: Enter their last name.
- Email: Add their email address.
- Phone: Add their phone number



Save the contact, then click add a note…



Notes: Add a note (e.g., "Called about rewiring job")

5. **Select Contact Type**

Scroll to the Contact Type section and assign the contact to a type like "Leads." Or "Customer"

Exercise:

Add Me as a contact with below details. Include a note like, "Test contact for Day 1 training."

Remember to Save Before leaving the contact.

James Dewane

james@jdewane.com

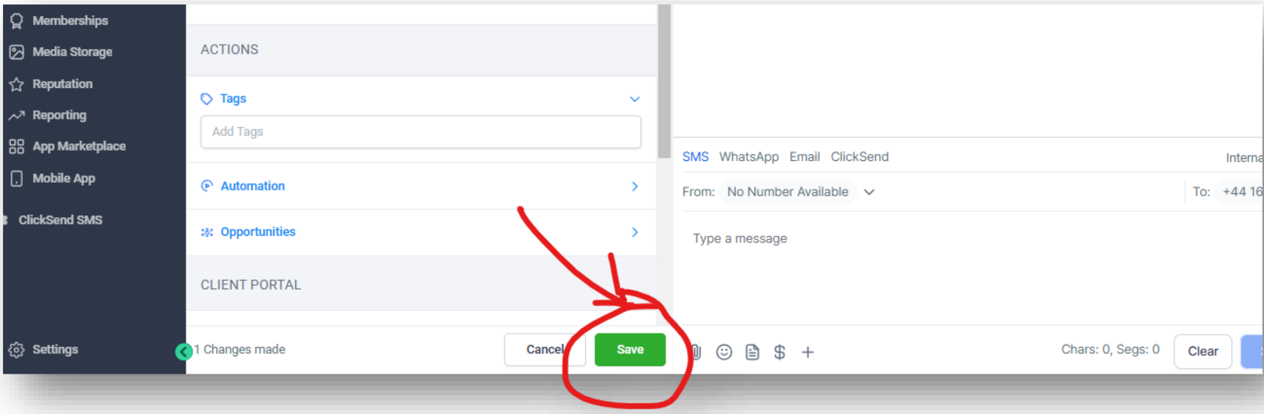
07917446668

innovation Ctr

Maidstone Rochester

Kent

ME5 9DFRd



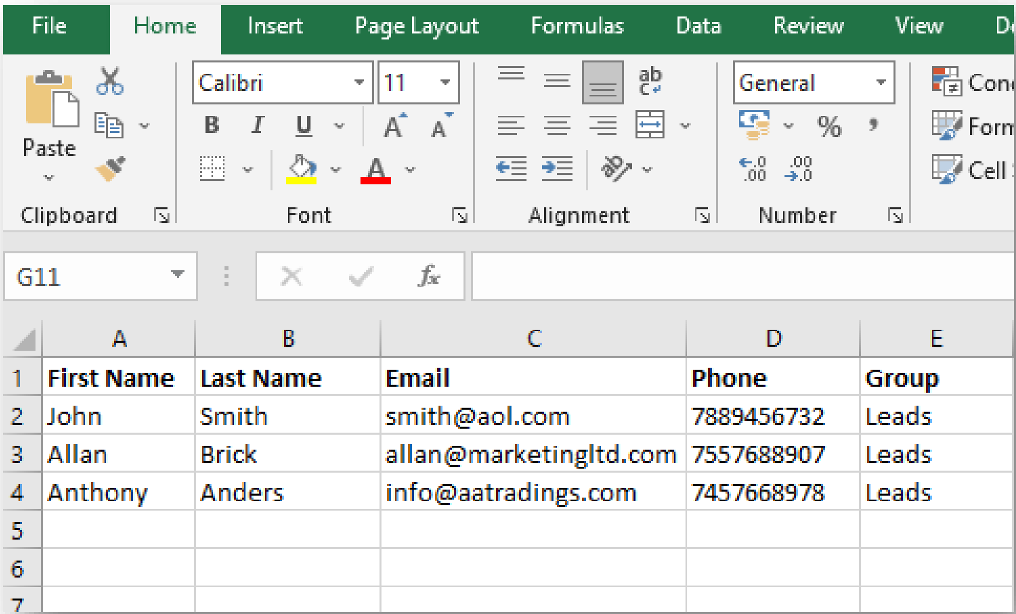
Section 2: Uploading Contacts in Bulk

For uploading multiple contacts at once, follow these steps:

1. **Prepare Your List**

➢ Open a spreadsheet tool like Excel or Google Sheets and create a list of contacts. Make sure your columns are labeled as:

- First Name
- Last Name
- Email
- Phone
- Group (e.g., Leads, Buyers)

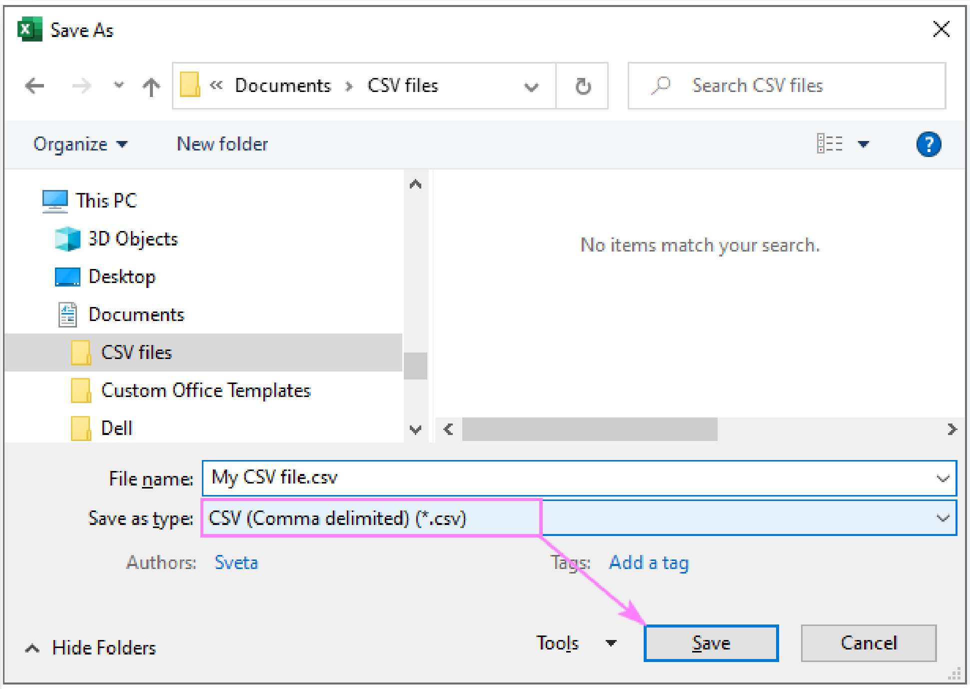


First Name	Last Name	Email	Phone	Group
John	Smith	smith@aol.com	7889456732	Leads
Allan	Brick	allan@marketingltd.com	7557688907	Leads
Anthony	Anders	info@aatradings.com	7457668978	Leads

2. Save the File as CSV

➢ Save the file in CSV format:

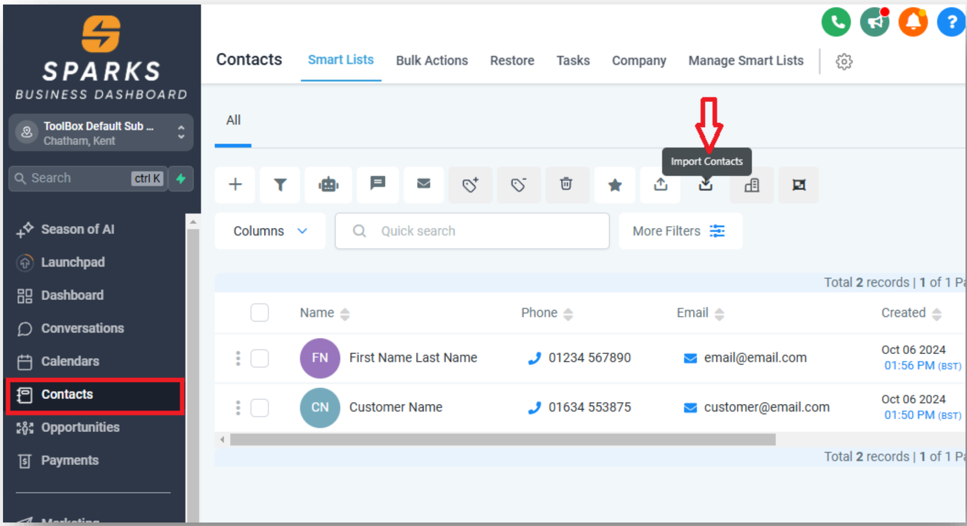
- Excel: Go to File > Save As > CSV (Comma Delimited).
- Google Sheets: Go to File > Download > Comma-Separated Values (.csv).



3. Import Contacts to SBD

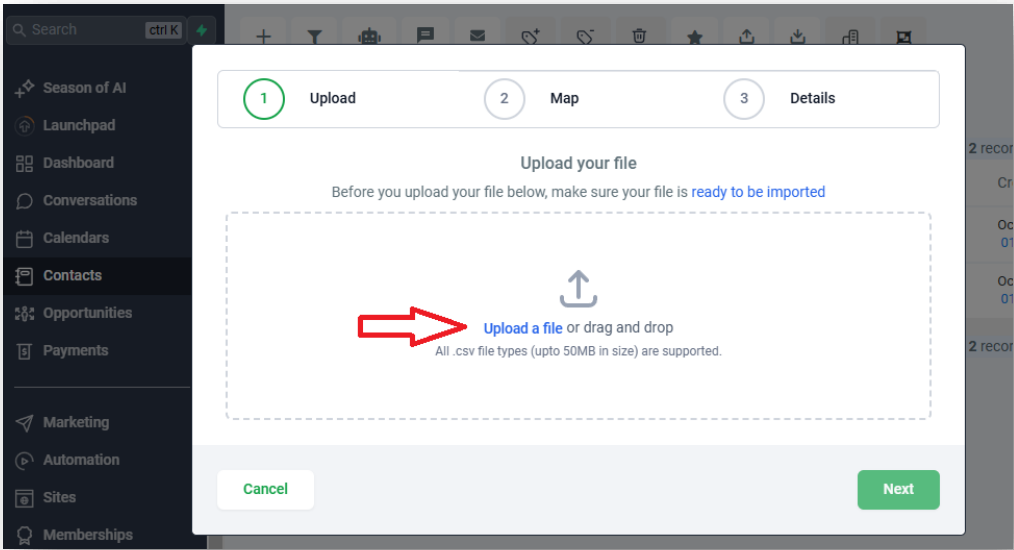
- Go to the Contacts tab in SBD

- Look for the Import Contacts button:
    - *On a Laptop/Desktop:* It's usually at the top-right or part of a dropdown menu.
    - *On a Smartphone/Tablet:* Tap the settings or options icon (e.g., three dots or gear icon) to find Import Contacts.



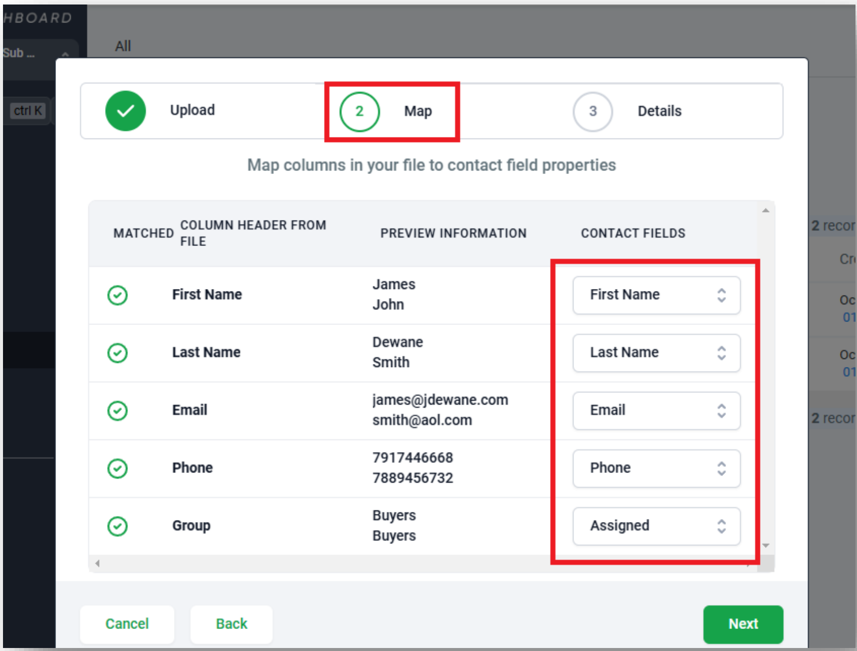
➤ **Upload the CSV File:**

- Select your CSV file and upload it.



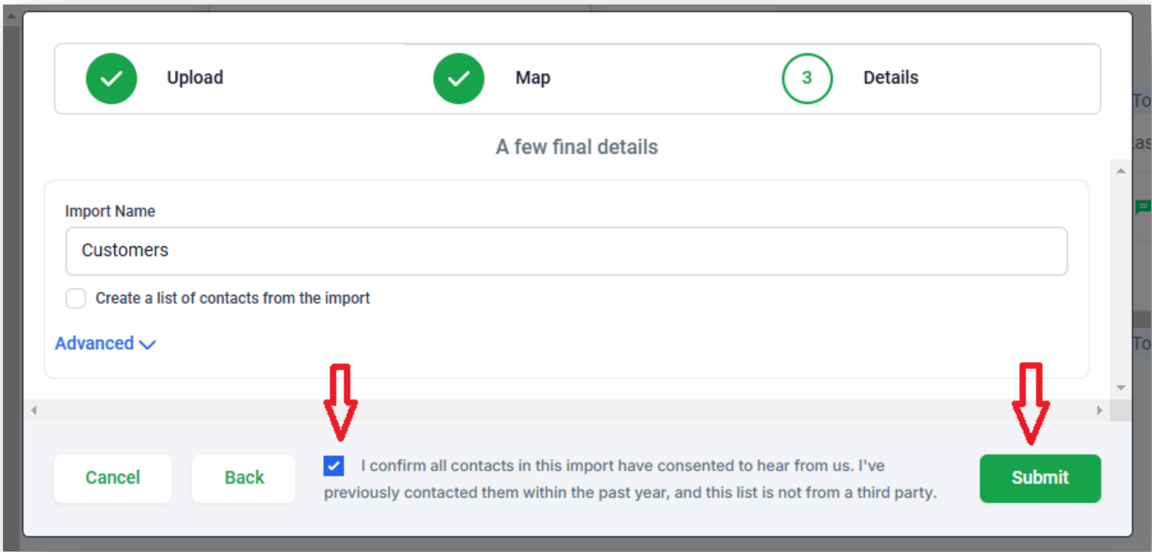
- Map the Fields

The system will ask you to match your spreadsheet columns to its fields (e.g., First Name → First Name). Verify that all fields are matched correctly.



➢ Assign to a Group

- During the import process, you can assign all contacts to a specific group, such as "Leads."



➢ Confirm Import

- Once the preview looks correct, click Import to upload your contacts.

Exercise:

Use the sample CSV file provided (download link [here]) to upload a small list of three sample contacts. Check if they appear in the "Leads" group afterward.

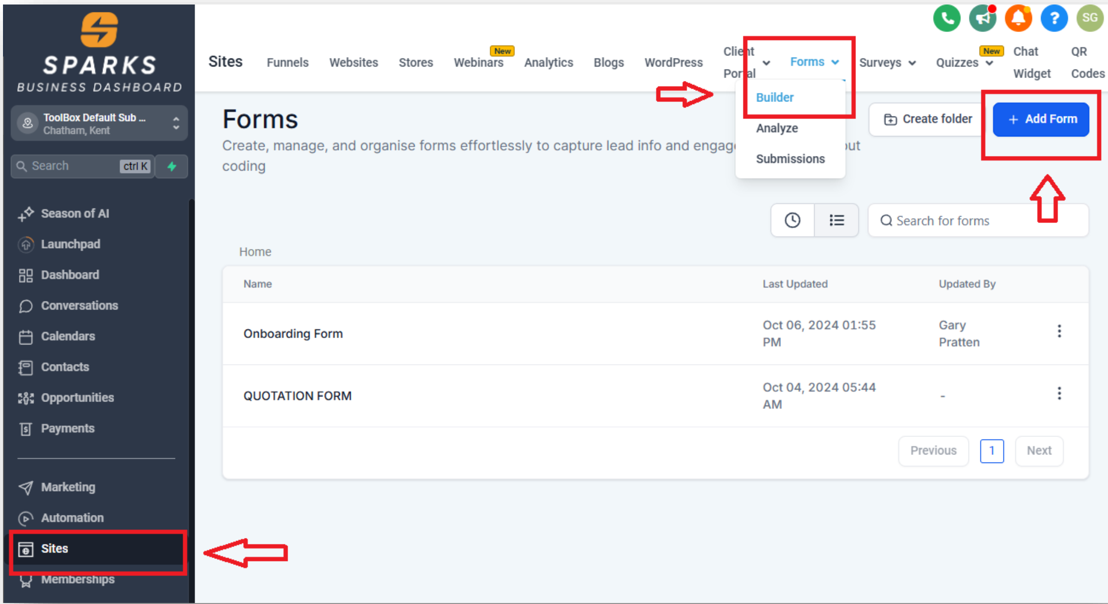
Section 3: Adding Contacts Using Forms

Using forms is an easy way to collect customer details automatically. You can use them for website inquiries, quote requests, or intake forms at events. Follow these steps to create and use a form:

Part A: Creating a Form

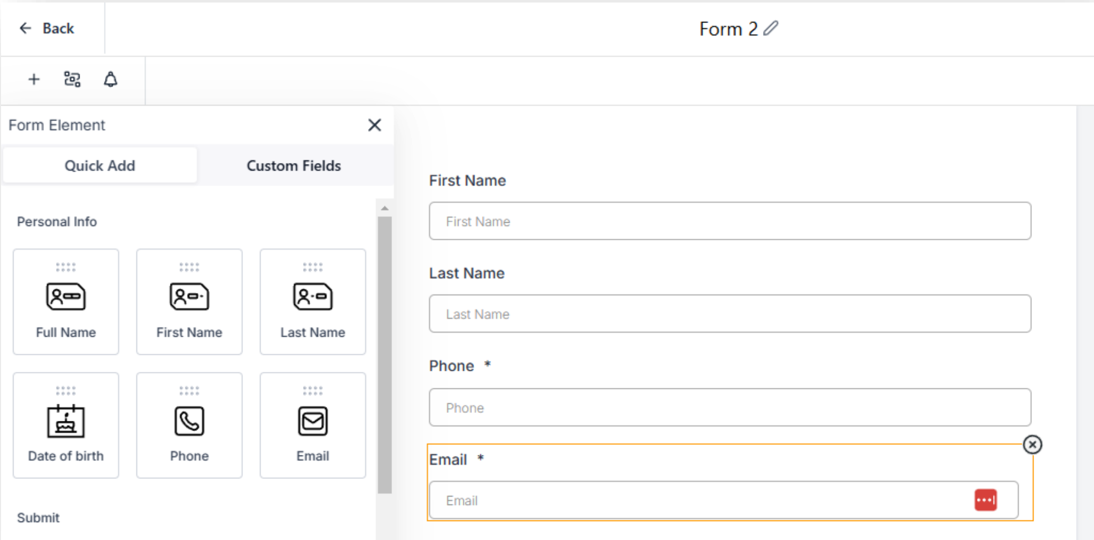
1. **Navigate to the Forms Builder**

- *On a Laptop/Desktop:* Click the Sites tab in the menu on the left-hand side. On the top menu bar is the Forms section.
- *On a Smartphone/Tablet:* Tap the hamburger menu (three lines) in the top-left corner, then tap Forms.



2. Create a New Form

- Look for a button labelled Create New Form or + New Form.
- Add Fields to Your Form



3. Drag and drop the following fields into the form area:

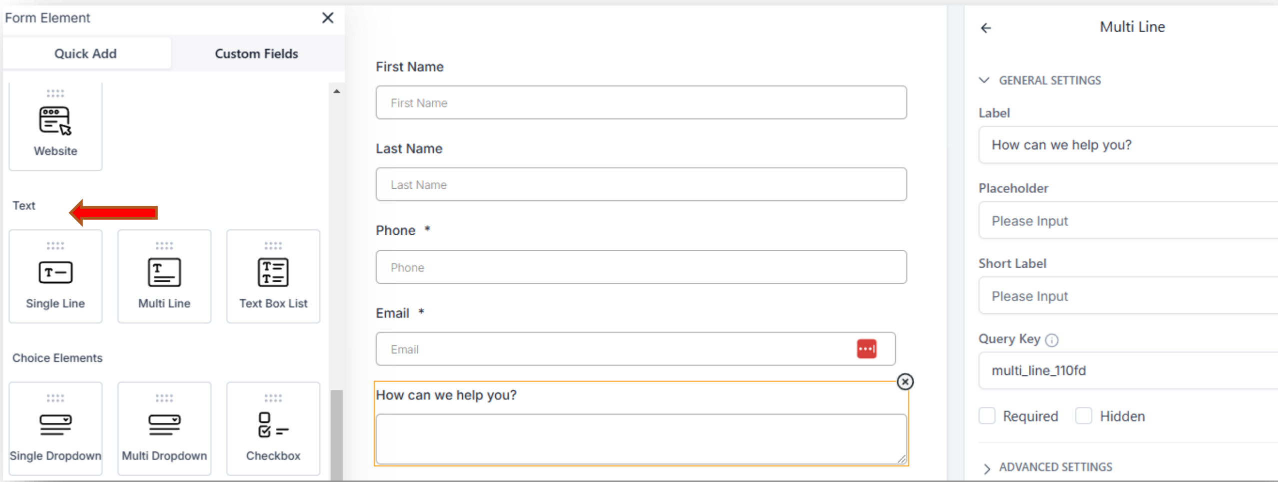
First Name

Last Name

Email

Phone Number

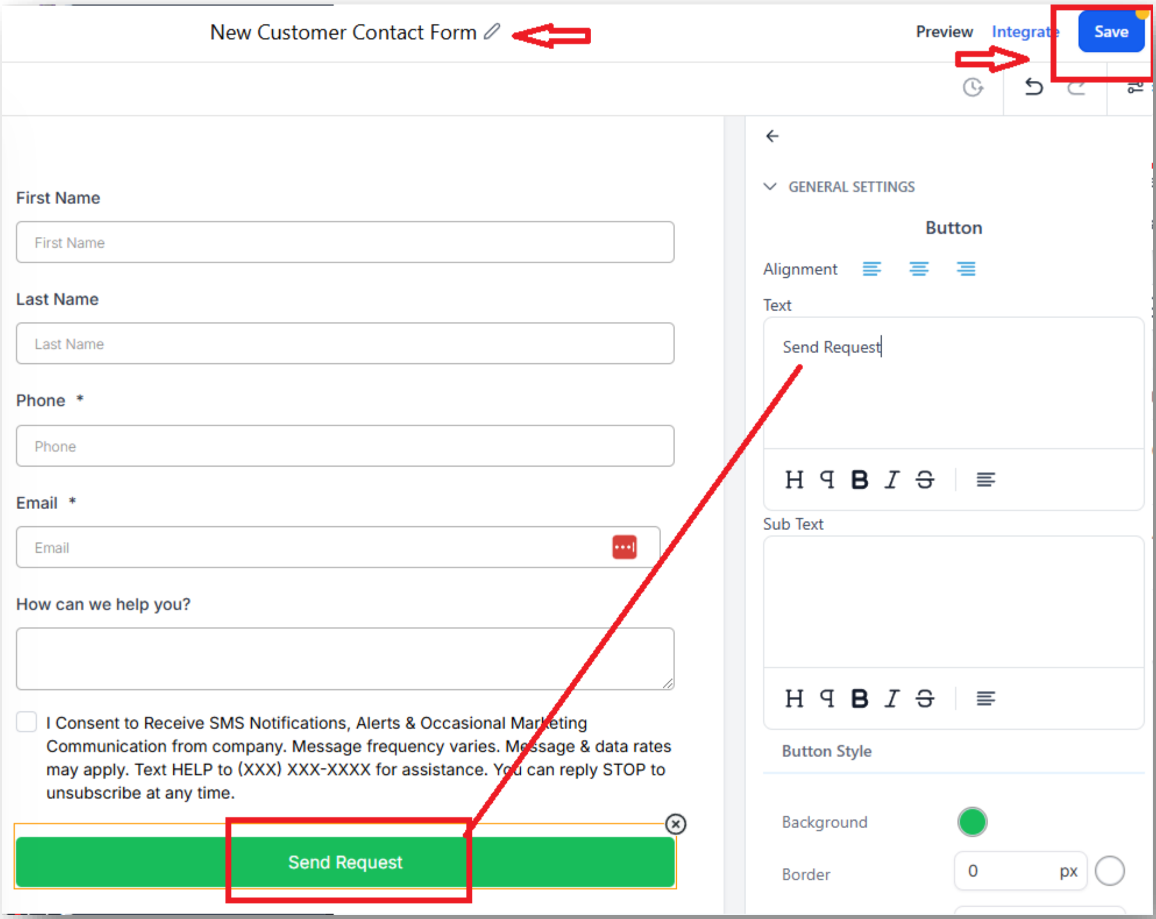
Notes (optional: "How can we help you?") Use the text element to add this.



4. Customise the Form

Form Title: Rename the form to something like “New Customer Contact Form.”

Submit Button: Change the button text to “Submit” or “Send Request.”



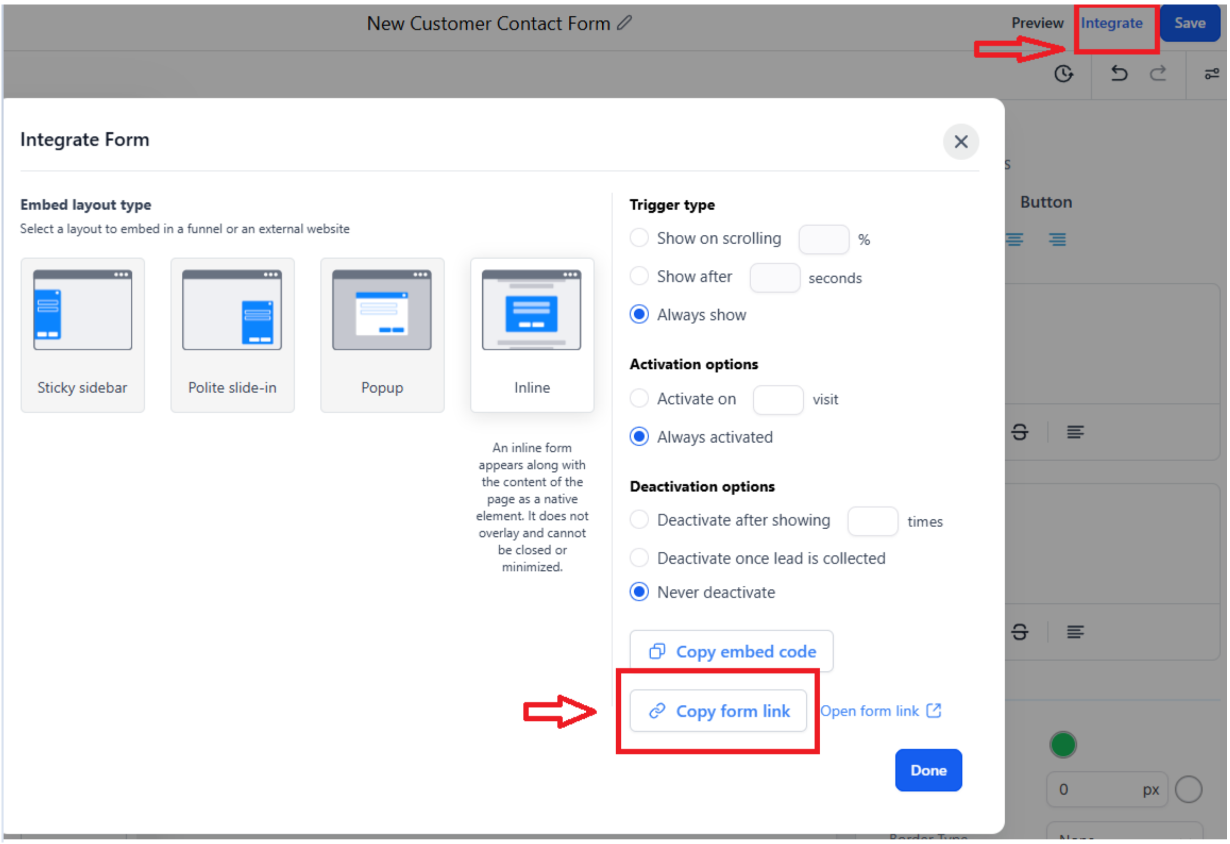
5. Save the Form

- Click or tap Save when done.

Part B: Sharing the Form

1. Get the Form Link

- ➢ After saving, click the integrate button.
- ➢ Copy the form link provided.



2. Embed or Share the Form

Option 1: Share the link directly via email or text.

Option 2: Embed the form on your website by copying the provided embed code and pasting it into your website builder.

- ➢ Test the Form
- ➢ Open the form link on your device and fill it out as if you're a customer.

Part C: Viewing Submitted Contacts

3. **Check Submissions**

- Go to the Contacts tab and look for the contact you just submitted via the form. It should appear automatically.
- Assign to a Group
- Edit the contact (if needed) and assign them to a group like "Leads."

Exercise:

1. Create a simple contact form with the fields listed above.
2. Share the form link with yourself or a colleague and test it by submitting a new contact.
3. Confirm the submission appears in your Contacts tab.

NOTE:

Watch out for today's **"Ask Me Anything" Post (AMA) at 3PM**, where you can ask any questions about today's Task. Post questions only in that thread.

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TOOLBOX

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