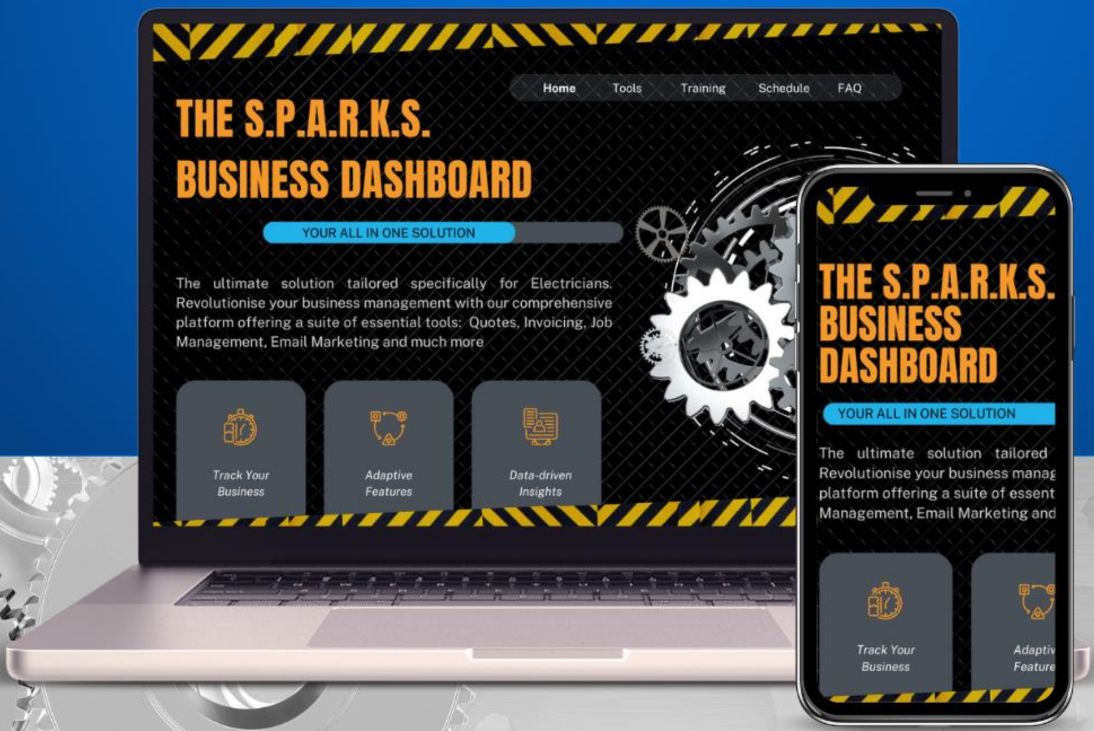
THE S.P.A.R.K.S. BUSINESS DASHBOARD



WORKBOOK

Day 2 Task 2

JAMES DEWANE
Helping Electricians Attract and Keep More Customers

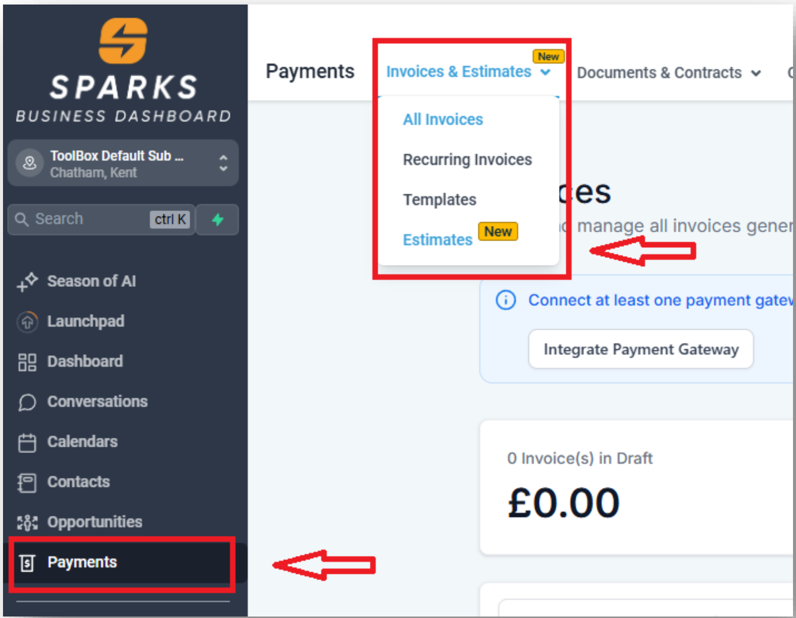
Task 2 Day 2

Creating and Sending Estimates

Section 1: Creating an Estimate

1. **Log In to Your S.P.A.R.K.S Business Dashboard**
   - ➢ Open your web browser and log in to your S.P.A.R.K.S Business Dashboard account.

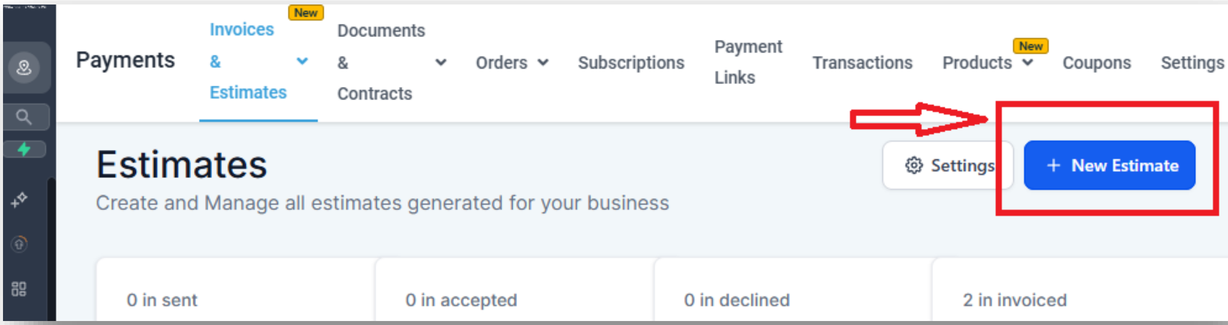
2. **Navigate to the Payments Section**
   - *On a Laptop/Desktop: Click on the Payments tab located in the left-hand menu.*
   - *On a Smartphone/Tablet: Tap the hamburger menu (three lines) in the top-left corner.*



- ➢ Select Payments from the menu options.
- ➢ Access the Estimates Feature
- ➢ At the top-left corner, click on the Invoices and Estimates dropdown.
- ➢ Select Estimates from the dropdown menu.

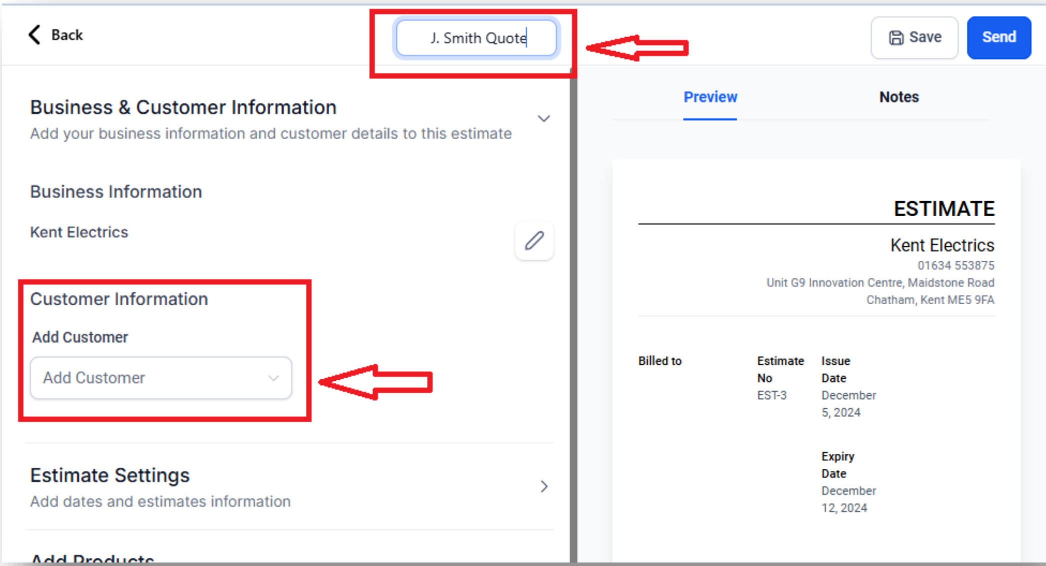
3. Create a New Estimate

- Click the New button to start creating a new estimate.



4. Enter Business Information

- Your business information should auto-populate based on your profile settings. Verify that all details are correct.
- Change the Name of the document at the top of the screen to reflect wat it is i.e J. Smith Quote

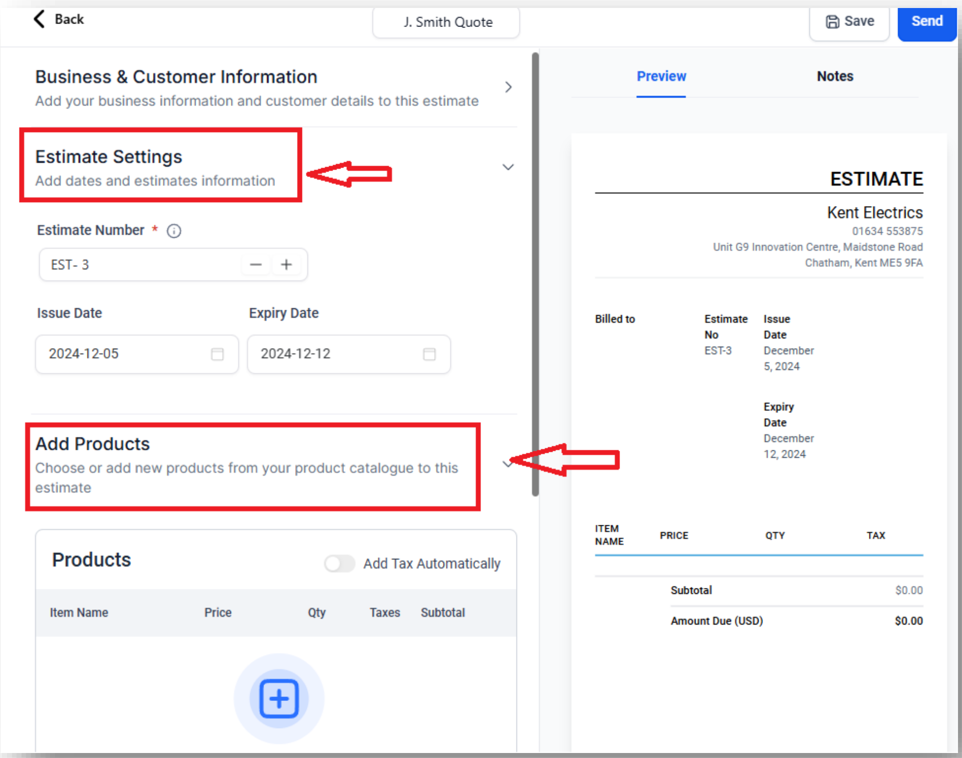


5. Select or Add a Customer

In the customer information section, choose an existing customer from your contacts or add a new customer by entering their details.

6. **Assign an Estimate Number and Expiry Date:**
   The system will automatically generate a unique estimate number.

7. **Set an expiry date to indicate how long the estimate is valid.**
   These will be auto populated based on your set-up, however you can override them.



8. **Add Products or Services**

   - Click on Add Products On the left-hand side. Then in the box that opens select "+ Add Products"
   - In the dropdown menu you can select a pre-loaded product/service or you can select "Create Product"

9. **If you Create A Product…**

For each item, specify:

Name: The name of the product or service.

Description: A brief description (optional).

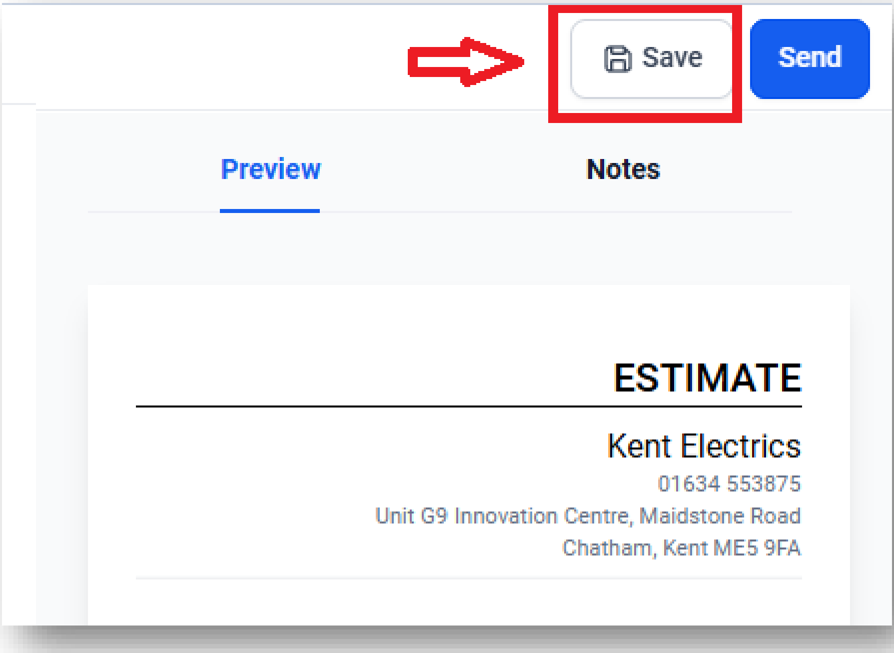
Quantity: Number of units or hours.

Price: Cost per unit or hour.

- Repeat this step to add multiple items as needed.
- Review and Customise the Estimate
- Check all entered information for accuracy.
- Add any additional notes or terms that are relevant to the estimate.

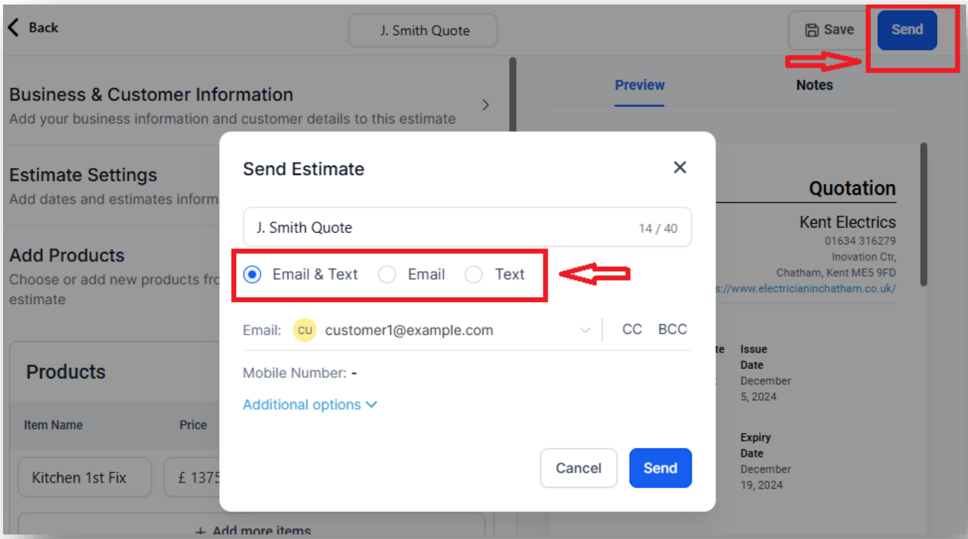
10. Save the Estimate

- Once all details are complete, click Save to store the estimate.



Section 2: Sending the Estimate

- **Send via Email**
- After saving, locate the estimate in your list.
- Click on the estimate to open it.
- Click the Send button.
- Choose Email as the sending method.
- Review the pre-filled email content and make any necessary edits to personalise the message.
- Ensure the estimate is attached to the email.
- Click Send to email the estimate to your customer.



- **Alternative Sending Methods**

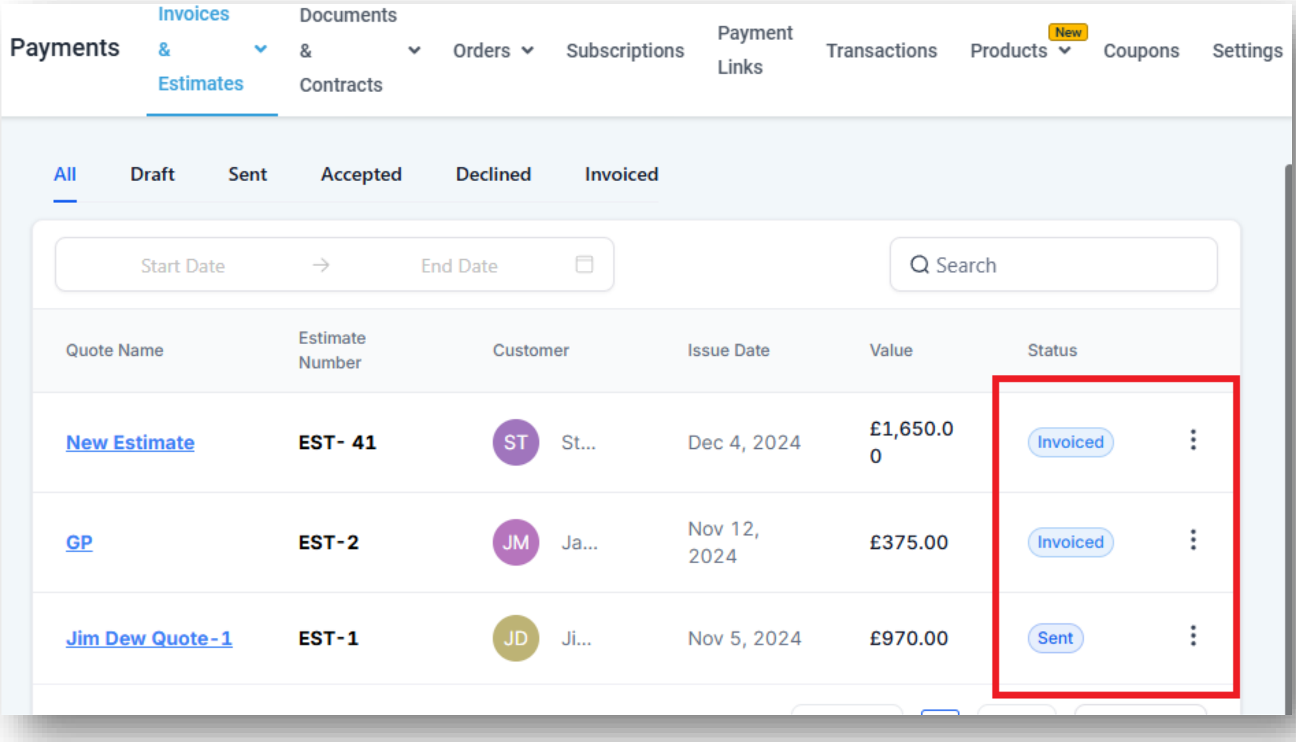
SMS: If you prefer to send the estimate via text message, select the SMS option and follow similar steps to send the estimate link through SMS.

Share Link: You can also copy the estimate link and share it directly with the customer through your preferred communication channel.

Section 3: Tracking and Managing Estimates

- **Monitor Estimate Status**

  - In the Estimates section, view the status of each estimate (e.g., Draft, Sent, Accepted, Declined).
  - Use filters to sort estimates by status or date.

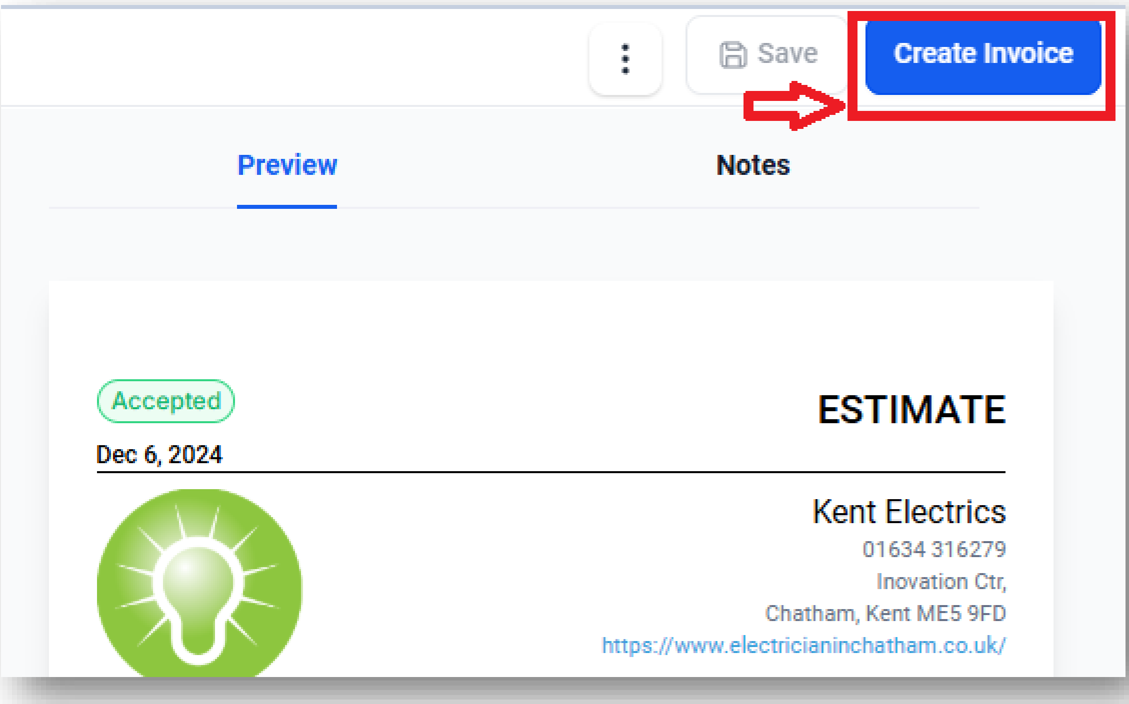


➢ **Customer Actions**

- Customers can accept or reject the estimate directly from the link they receive.
- Once a customer accepts the estimate, it will be marked as Accepted in your dashboard.

➢ **Convert Accepted Estimates to Invoices**

- For accepted estimates, click on the estimate and select Convert to Invoice.
- This action will generate an invoice based on the estimate details, which you can then send to the client for payment.
- You can add any variations to the invoice by selecting "Add product" from the left-hand side and entering the details of the addition / variation



Exercise:

1. Create a Test Estimate
2. Follow the steps above to create an estimate for a test customer.
3. Include at least one service with a specified quantity and price.
4. Send the Estimate to Yourself
5. Use your email address to send the estimate.
6. Check your inbox to view the received estimate and understand the customer's perspective.
7. Accept the Estimate as a Customer
8. Click the acceptance link in the email to simulate client acceptance.
9. Verify that the estimate status updates to Accepted in your dashboard.
10. Convert the Estimate to an Invoice
11. In your dashboard, convert the accepted estimate into an invoice.
12. Review the invoice details to ensure accuracy.

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.

My Electricians TOOLBOX

www.jdewane.com

james@jdewane.com

@jamestoolbox