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

WORKBOOK

Day 3 Task 3

JAMES DEWANE
Helping Electricians Attract and Keep More Customers

Task 3 Day 3

Invoice and Automation Follow up

Section 1: Creating an Invoice with a Payment Link

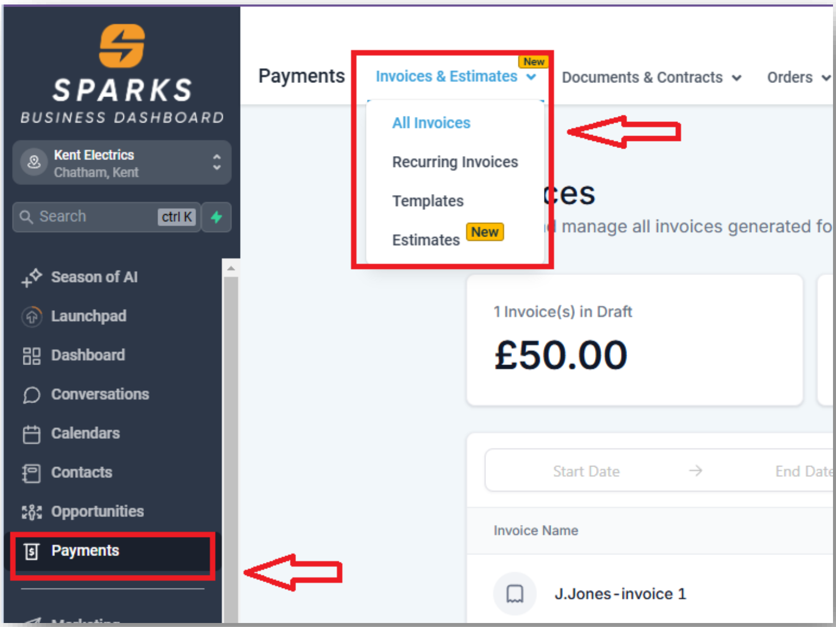
In this workbook you will be creating an invoice from scratch, without a quote.

1. Log In to Your SPARKS Business Dashboard

- Open your web browser and log in to your SPARKS Business Dashboard account.
- Navigate to the Payments Section

On a Laptop/Desktop: Click on the Payments tab located in the left-hand menu.

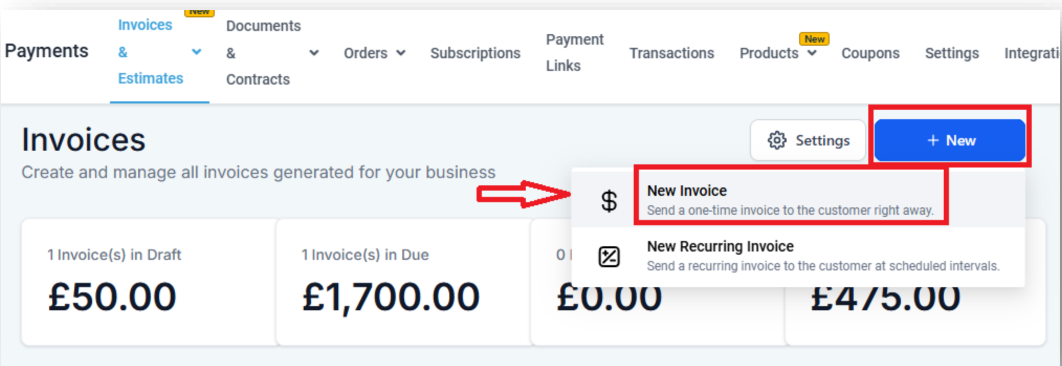
On a Smartphone/Tablet: Tap the hamburger menu (three lines) in the top-left corner.



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

2. Create a New Invoice

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

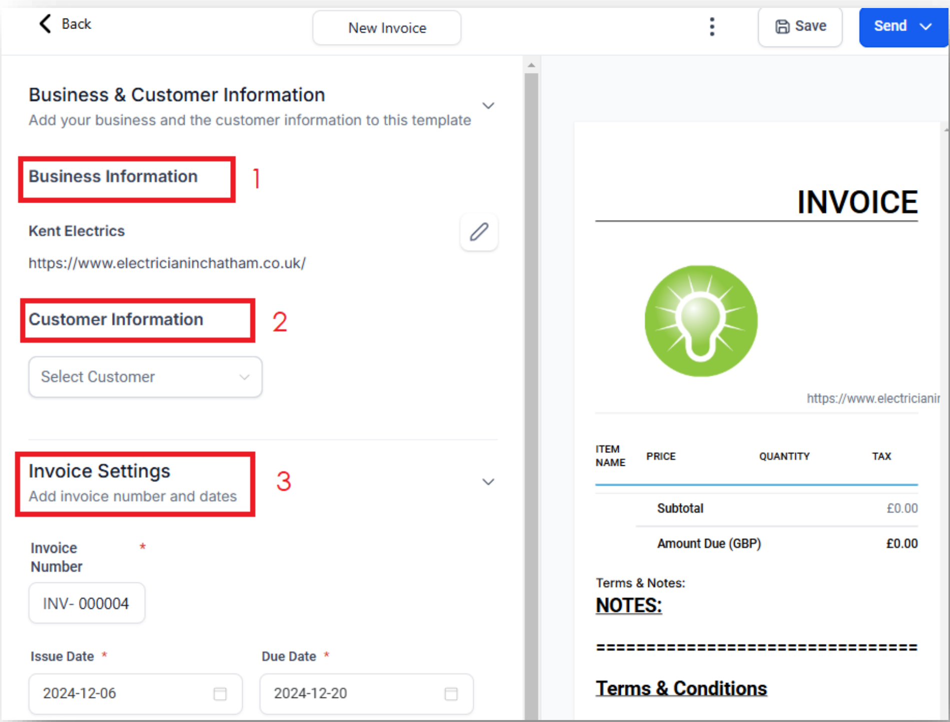


➢ Verify Business Information

- Ensure your business details are correct. These should auto-populate based on your profile settings.

➢ 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.



➢ Assign an Invoice Number and Due Date

- The system will automatically generate a unique invoice number.

➢ Set a due date for the payment.

- ➢ Add Products or Services
- Click on Add Product or Add Service to include items in the invoice.

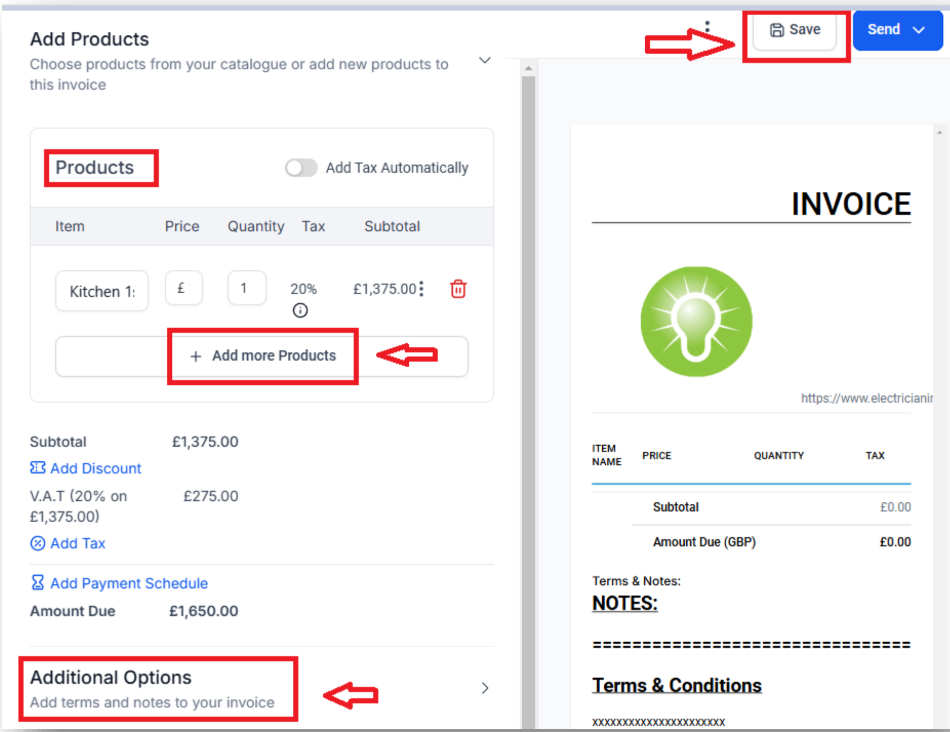
For each item, specify:

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.

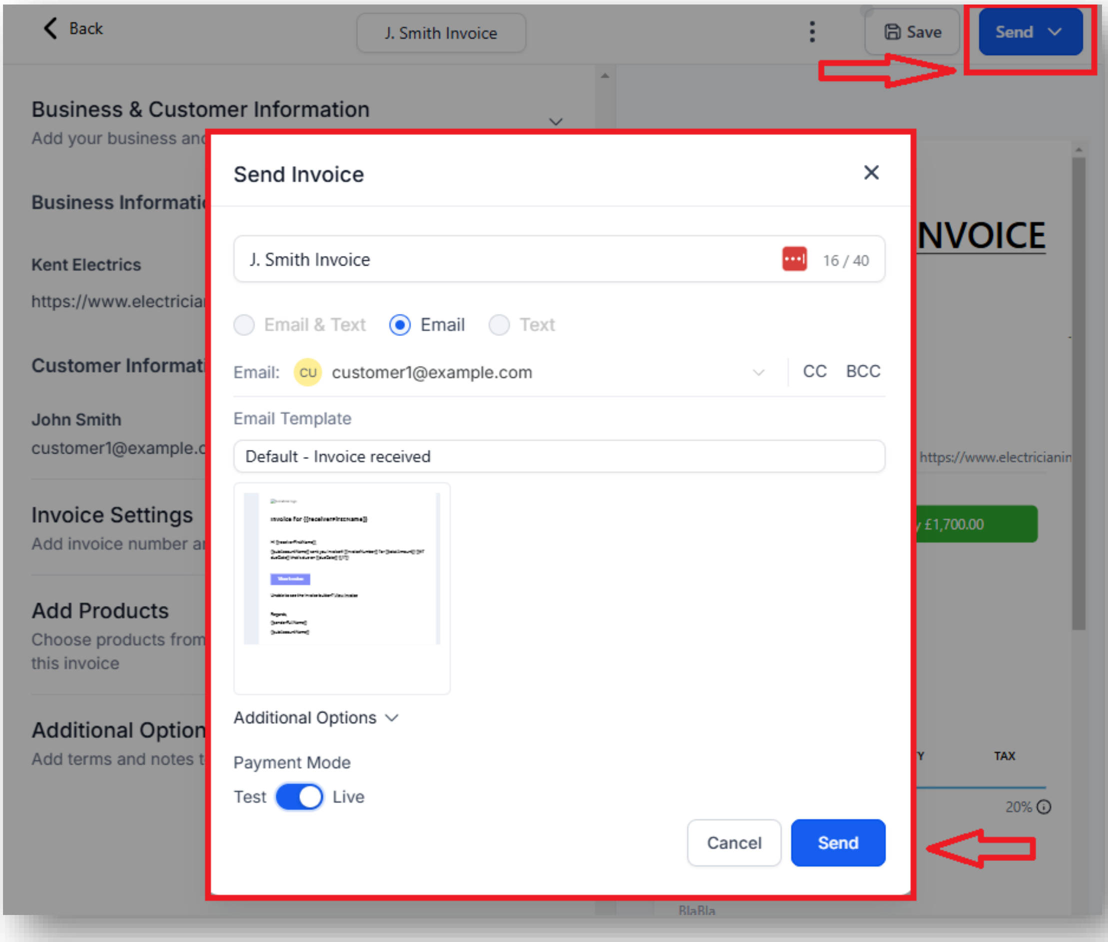
- ➢ Review and Customise the Invoice
- Check all entered information for accuracy.

- ➢ Add any additional notes or terms relevant to the invoice.

- ➢ Save the Invoice
- Once all details are complete, click Save to store the invoice.

3. Send the Invoice with a Payment Link

- After saving, locate the invoice in your list.
- Click on the invoice 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 invoice is attached, and a payment link is included.
- Click Send to email the invoice to your customer.

Section 2: Setting Up Automated Follow-Up Sequences

1. Navigate to the Automation Section

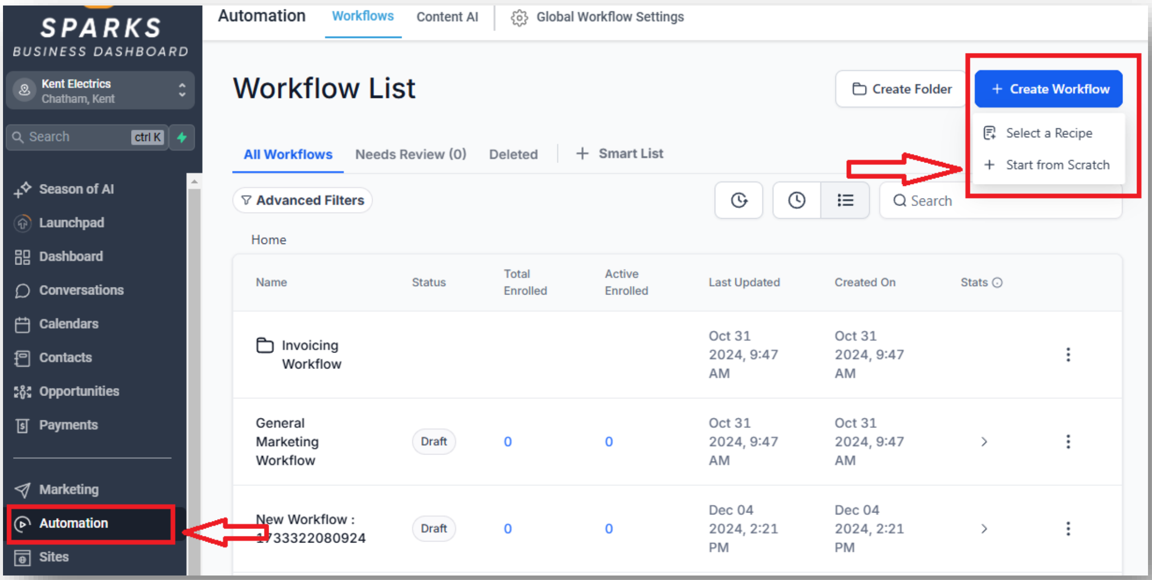
On a Laptop/Desktop: Click on the Automation tab in the left-hand menu.

On a Smartphone/Tablet: Tap the hamburger menu and select Automation.

2. Create a New Workflow

Note: If you already have a Workflow called "When an Invoice is Sent", You do not need to complete the following steps.

- ➢ Click the Create Workflow button.
- ➢ Choose to start from scratch or use a template that suits your needs



- ➢ Set the Trigger
- Define what will start the automation. For example:

Invoice Sent: Triggers when an invoice is sent to a customer.

Invoice Due Date Approaching: Triggers a reminder as the due date nears.

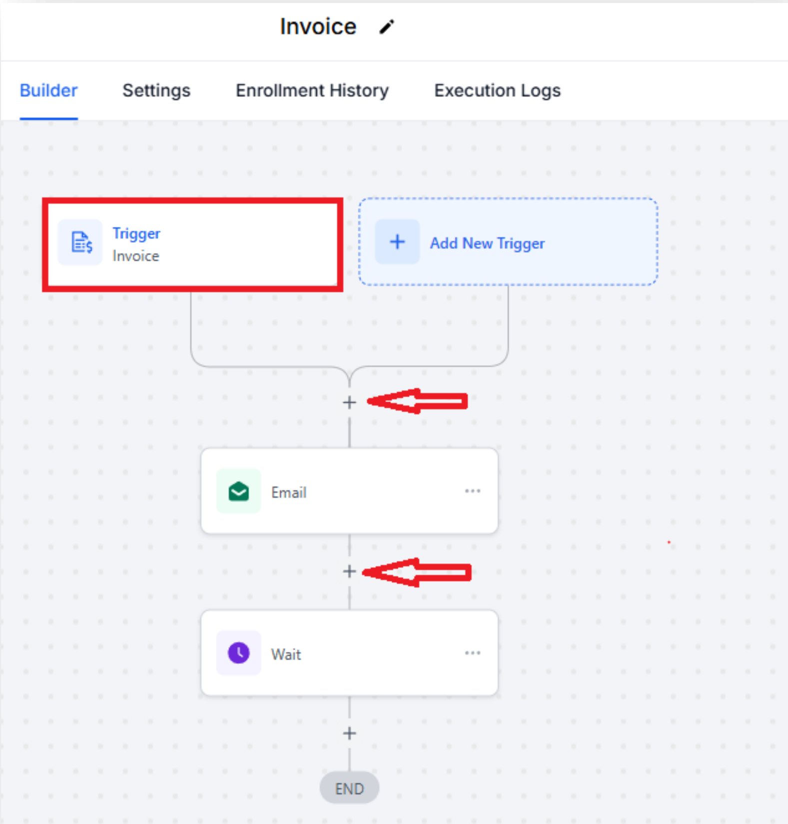
➢ Add Actions
- After setting the trigger, define the actions the system should take.

For example:

Send Email: Craft an email reminding the customer about the upcoming payment due date.

Send SMS: Send a text message as a gentle reminder.

Wait: Introduce delays between actions (e.g., wait 3 days before sending a follow-up).

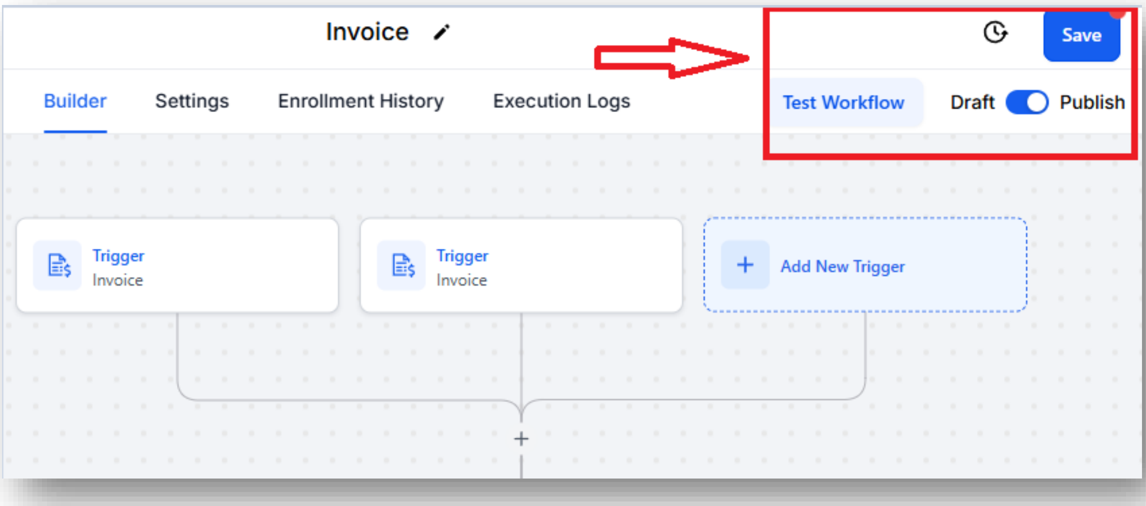


➢ Define Conditions (Optional)
- Set conditions to tailor the workflow. For example:

If/Else: Branch the workflow based on whether the invoice has been paid.

3. Test the Workflow

- Before activating, test the workflow to ensure it functions as intended.
- Activate the Workflow
- Once satisfied, activate the workflow to start automating your follow-up sequences.



Exercise

1. Create a Test Invoice
2. Follow the steps above to create an invoice for a test customer.
3. Include at least one product or service with a specified quantity and price.
4. Send the Invoice to Yourself
5. Use your email address to send the invoice.
6. Check your inbox to view the received invoice and understand the customer's perspective.
7. Set Up a Follow-Up Workflow
8. Create a workflow that sends a reminder email 2 days after the invoice is sent if it remains unpaid.
9. Test the workflow to ensure it triggers correctly.

Simulate the Customer Experience

- Mark the invoice as paid and observe how the workflow responds.
- Ensure that no further reminders are sent once the invoice is paid.

My Electricians TOOLBOX

www.jdewane.com

james@jdewane.com

@jamestoolbox