

LOGIN DETAILS

Username: Located on the Right-Hand Side of your SEAT

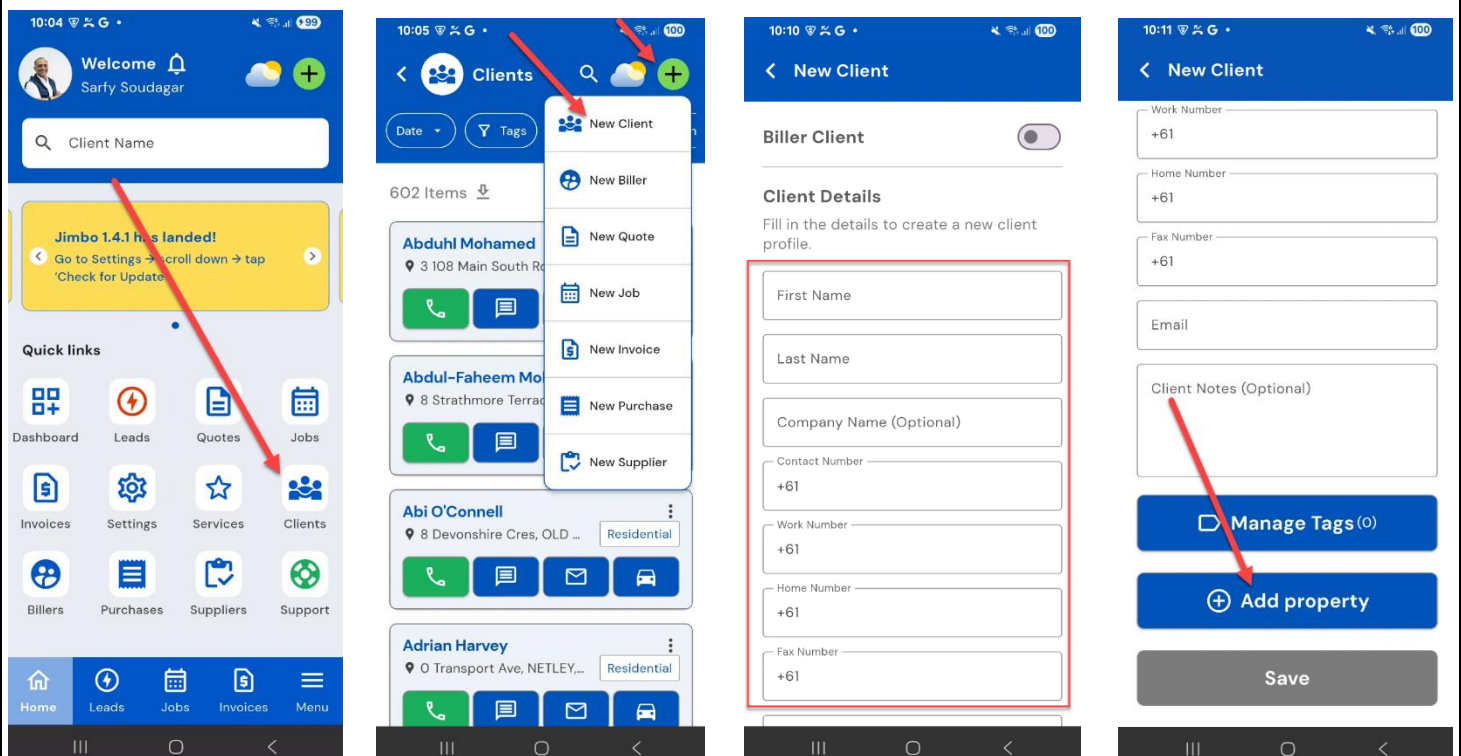
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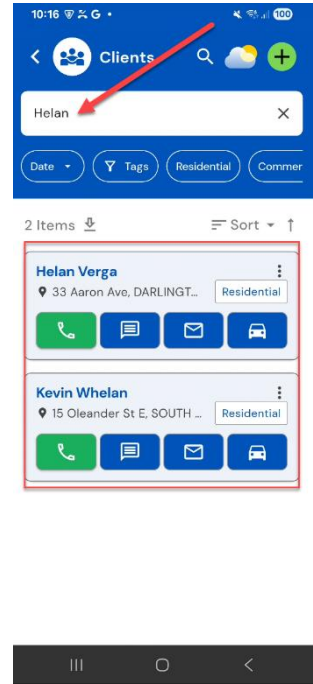
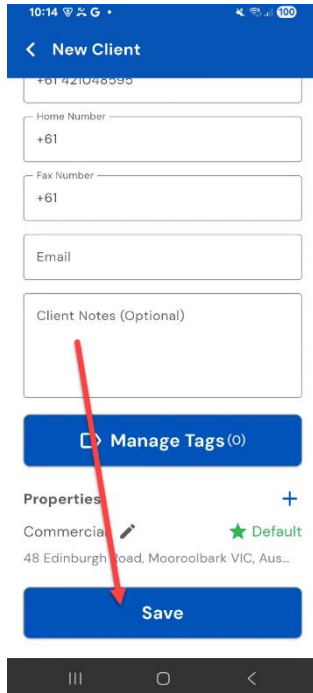
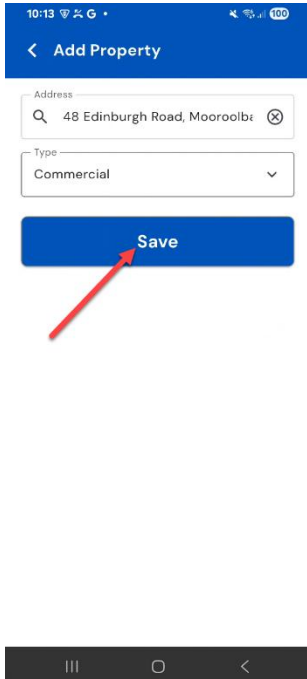
Exercise 1: CREATE A TEST CLIENT

- Go to Clients
- Click the + icon → New Client

Enter the following:

- First Name: A test First Name
- Last Name: A test Last Name
- Email: A random email address
- Phone: A random mobile phone
- Client Notes: Enter the words Test Notes
- Property: 48 Edinburgh Road Mooroolbark, VIC (Or any Address in Australia)
- Type: Residential or Commercial (your choice).
- Save





Exercise 2: CREATE A TEST QUOTE

- Go to Clients
- Search for the client by First name (top right search icon). Then click on the client
- Click Send Quote

Quote Details:

- Quote Number: Any sequence of digits
- Add any service → Set Unit Price to \$100
- Click Add to Quote
- Click → Save (top right-hand side) → **Approve**

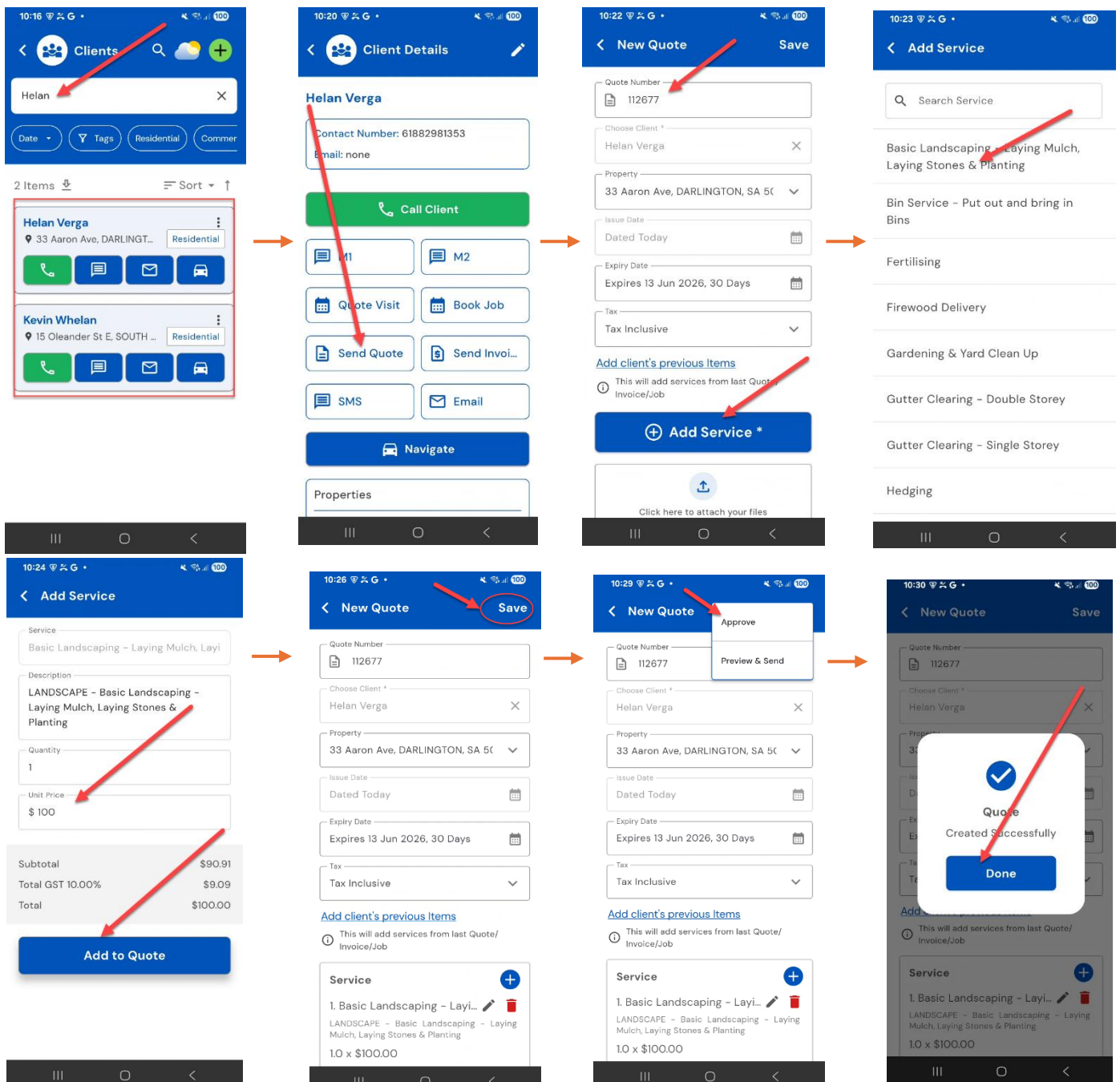
Note:

Approve:

Creates and approves the quote in the system without sending it via email.

Preview and Send:

Creates and approves the quote, plus sends it to the client via email



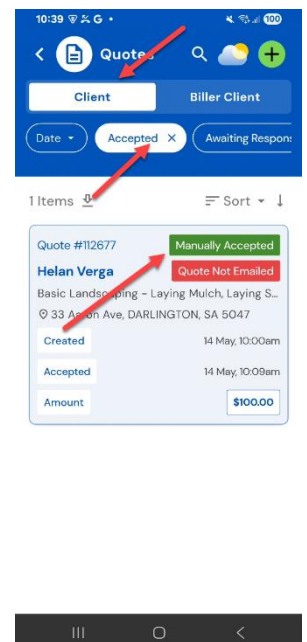
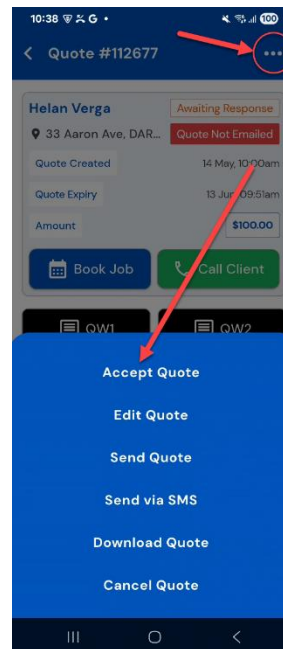
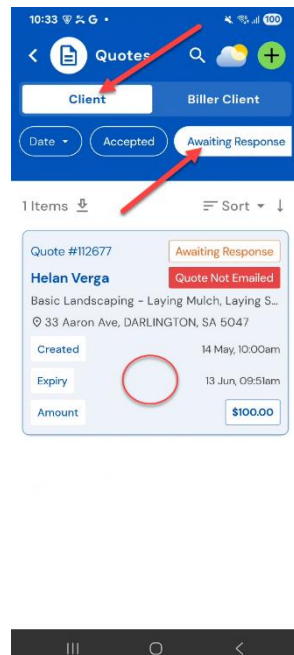
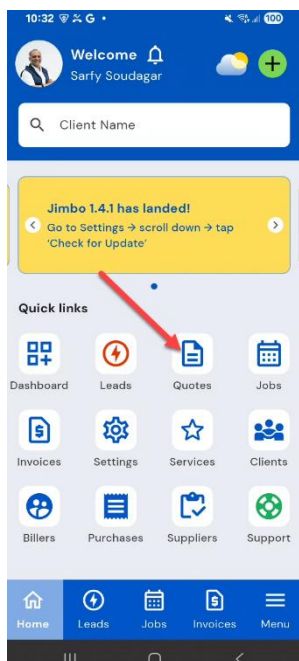
Exercise 3: ACCEPT THE QUOTE – MANUALLY

Click on Quotes.

- Click on Awaiting Response.
- Select the relevant Quote.
- Click on the Three Dots (⋮) menu from the top right-hand side
- Click Accept Quote (you have now, manually accepted the Quote on behalf of the client)

Let's check quickly

- Go to Notifications → View accepted quote
- Go to Quotes → Accepted → check if you can see the Quote in there

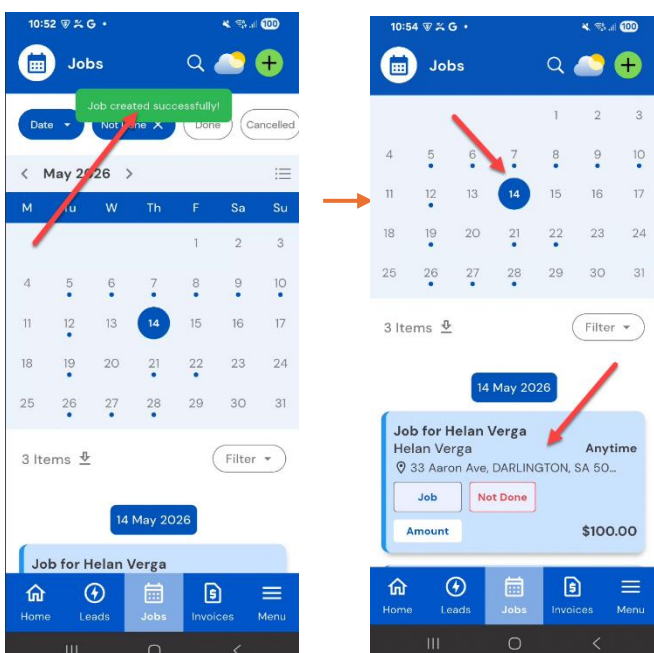
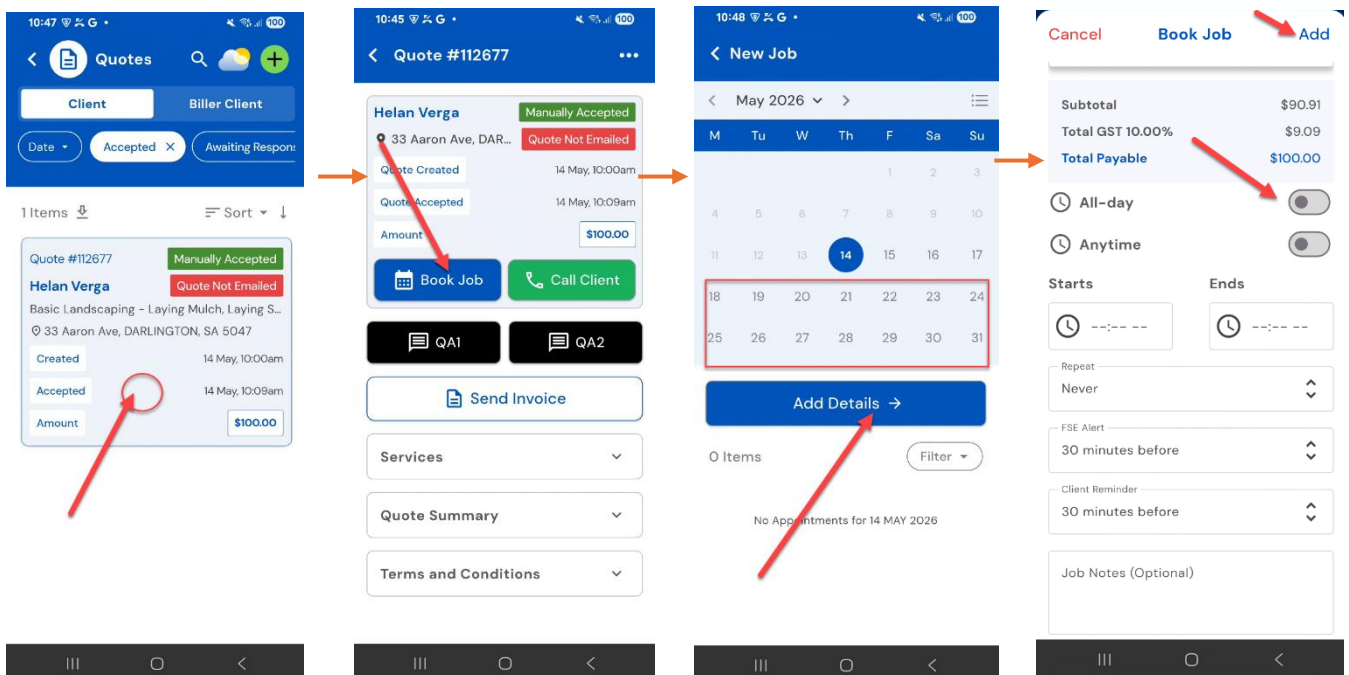


Exercise 4: BOOK THE JOB

Go to Quotes, Accepted, Click on the relevant Quote

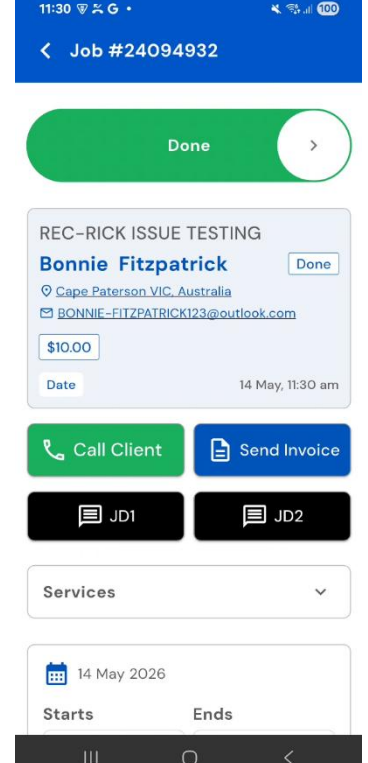
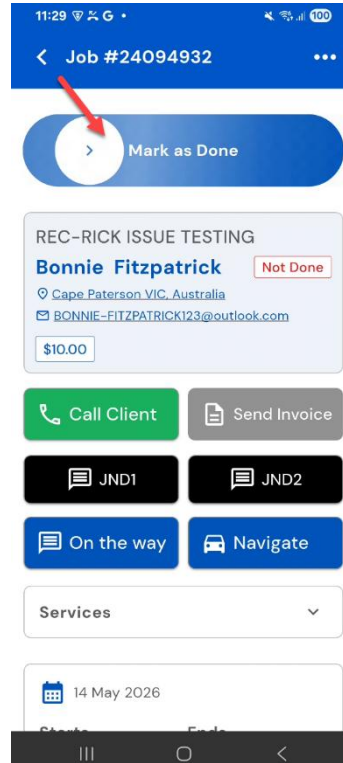
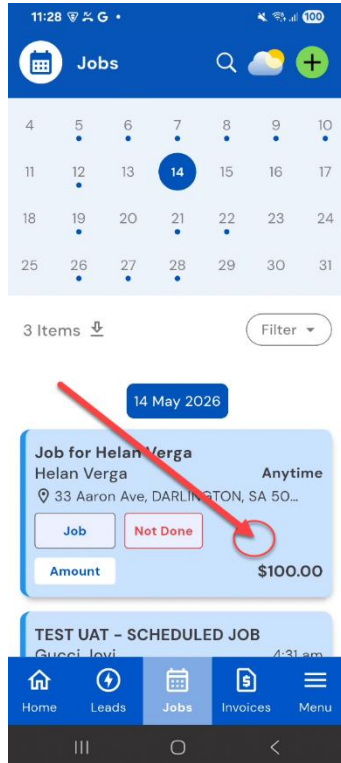
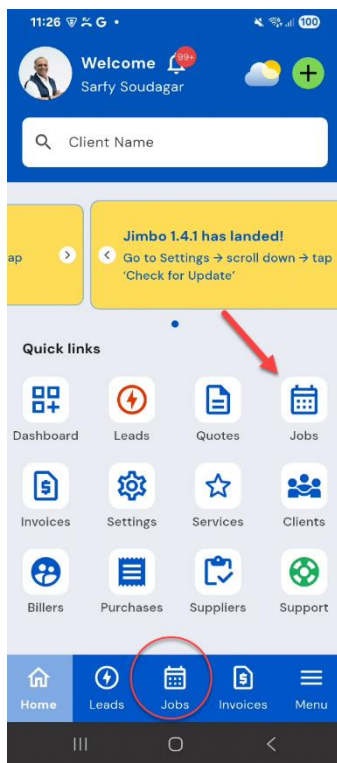
- Click Book Job
- Select Today's Date → Add Details

- Anytime
- FSE Alert: None
- Client Reminder: None
- Click Add



Exercise 5: COMPLETE THE JOB

- Go to Home → Jobs
- Scroll to find your job and tap on it
- Swipe to mark as Done



Exercise 6: SEND INVOICE

- Go to Jobs, Done, Click on the relevant Job
- Click Send Invoice → Save → **APPROVE**

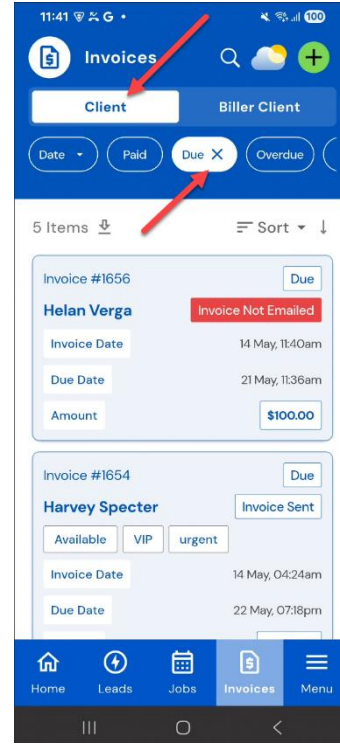
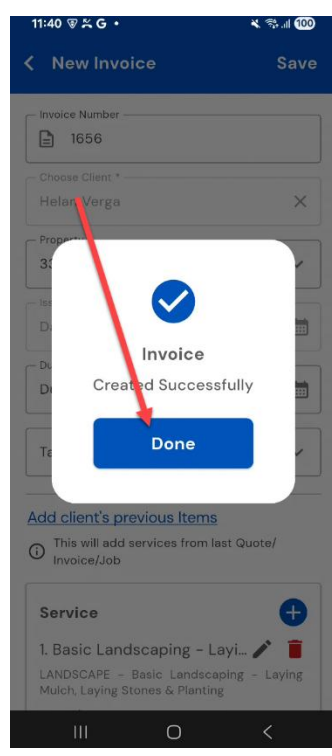
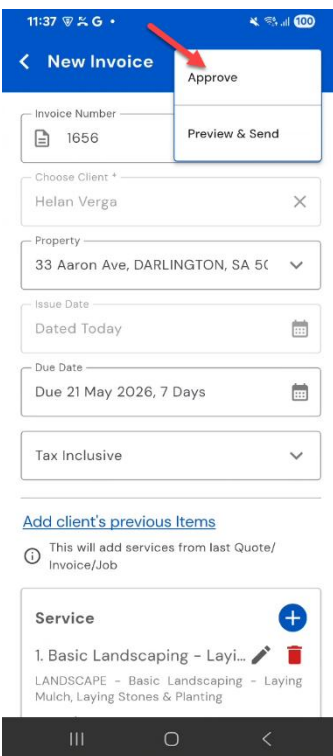
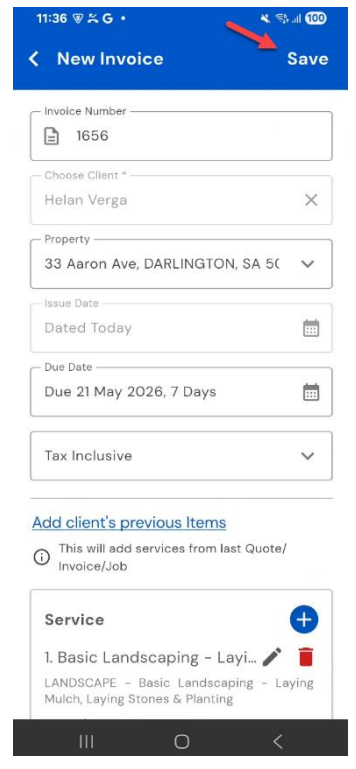
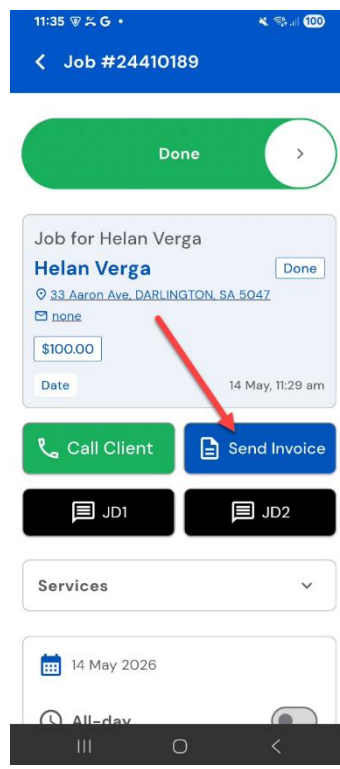
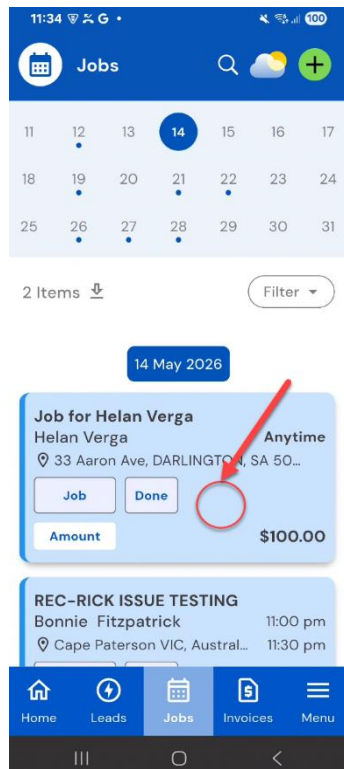
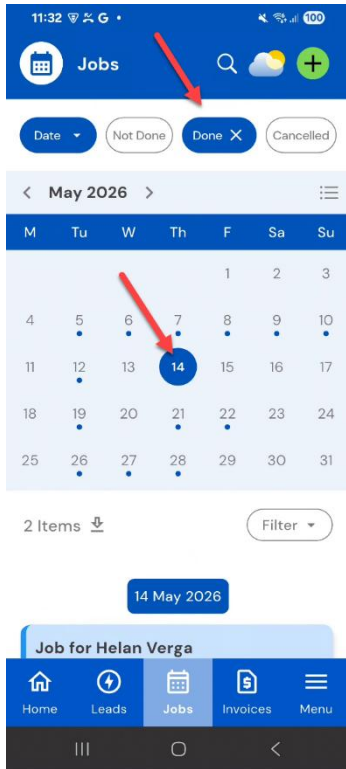
Note:

Approve:

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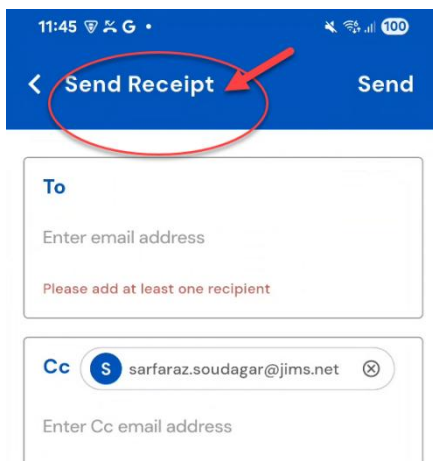
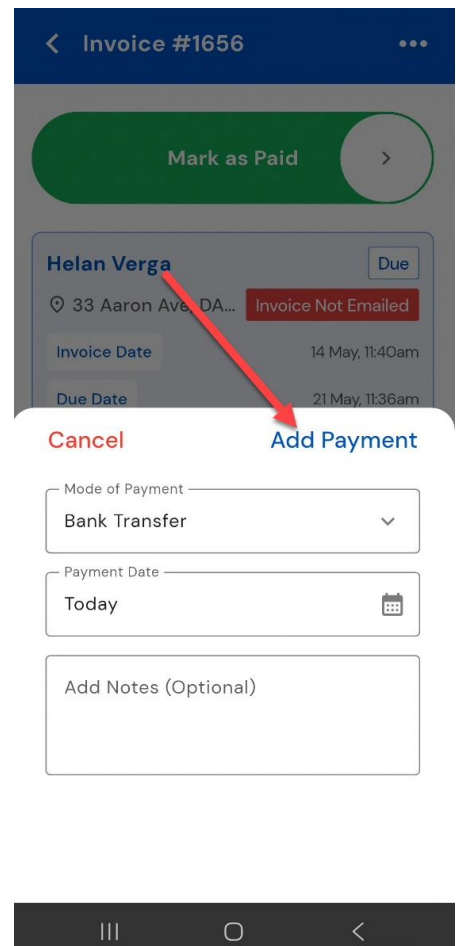
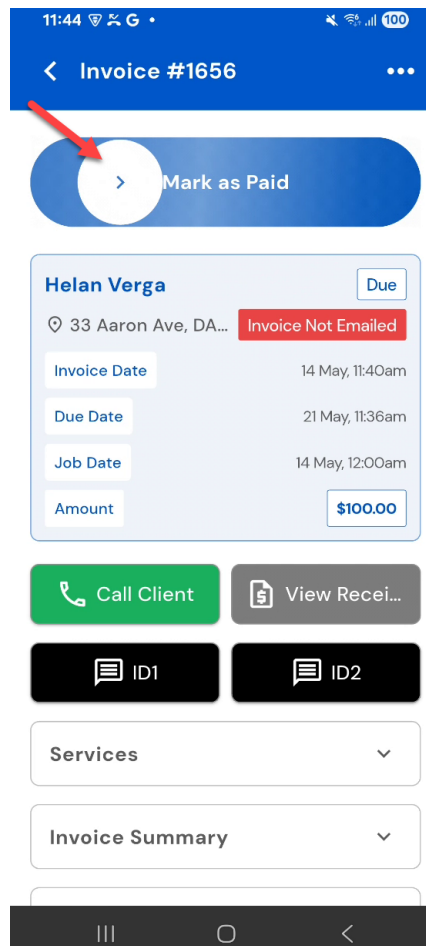
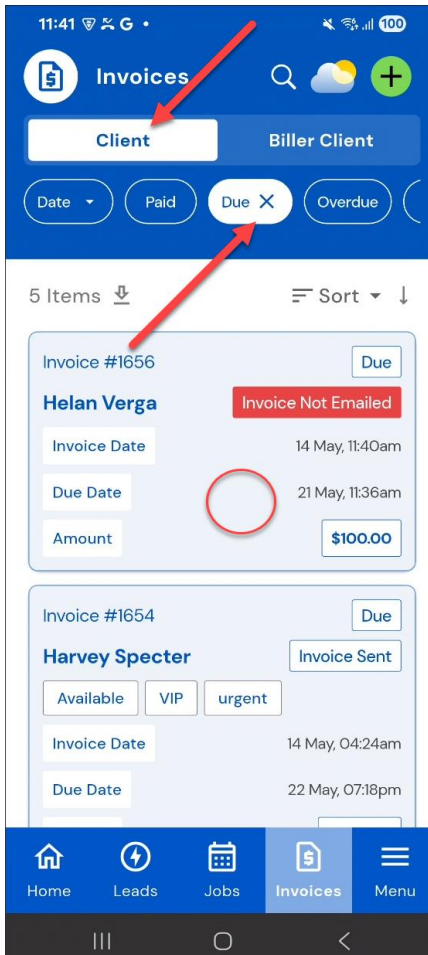
Preview and Send:

Creates and approves the quote, plus sends it to the client via email



Exercise 7: MARK INVOICE AS PAID

- Go to Invoices → Due → Click on relevant invoice
- Swipe to mark as Paid
- Select appropriate options → DO NOT Send receipt. This is a Test System



END OF EXERCISE