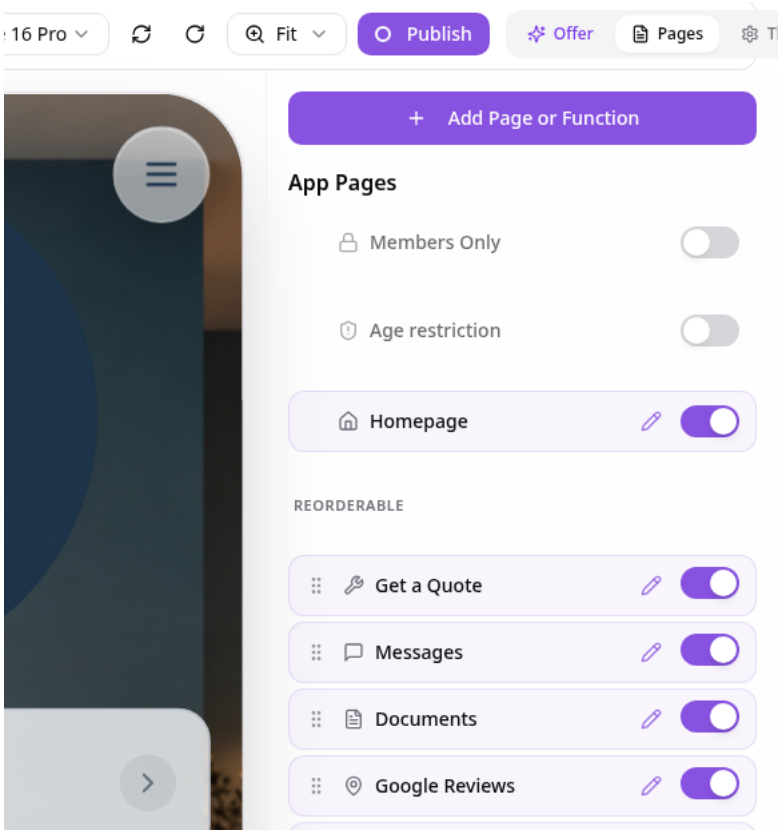
Trade Jobs & Quotes

1. Open Pages

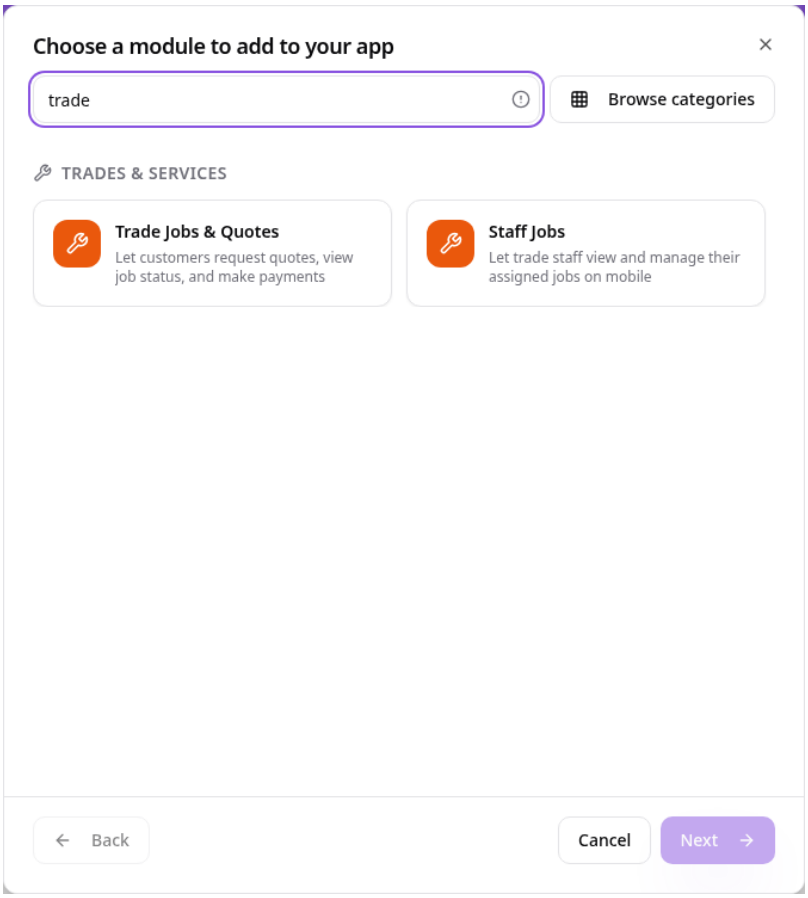
In your app editor, open Pages and choose Add Page or Function.



Trade Jobs & Quotes

2. Choose Trade Jobs & Quotes

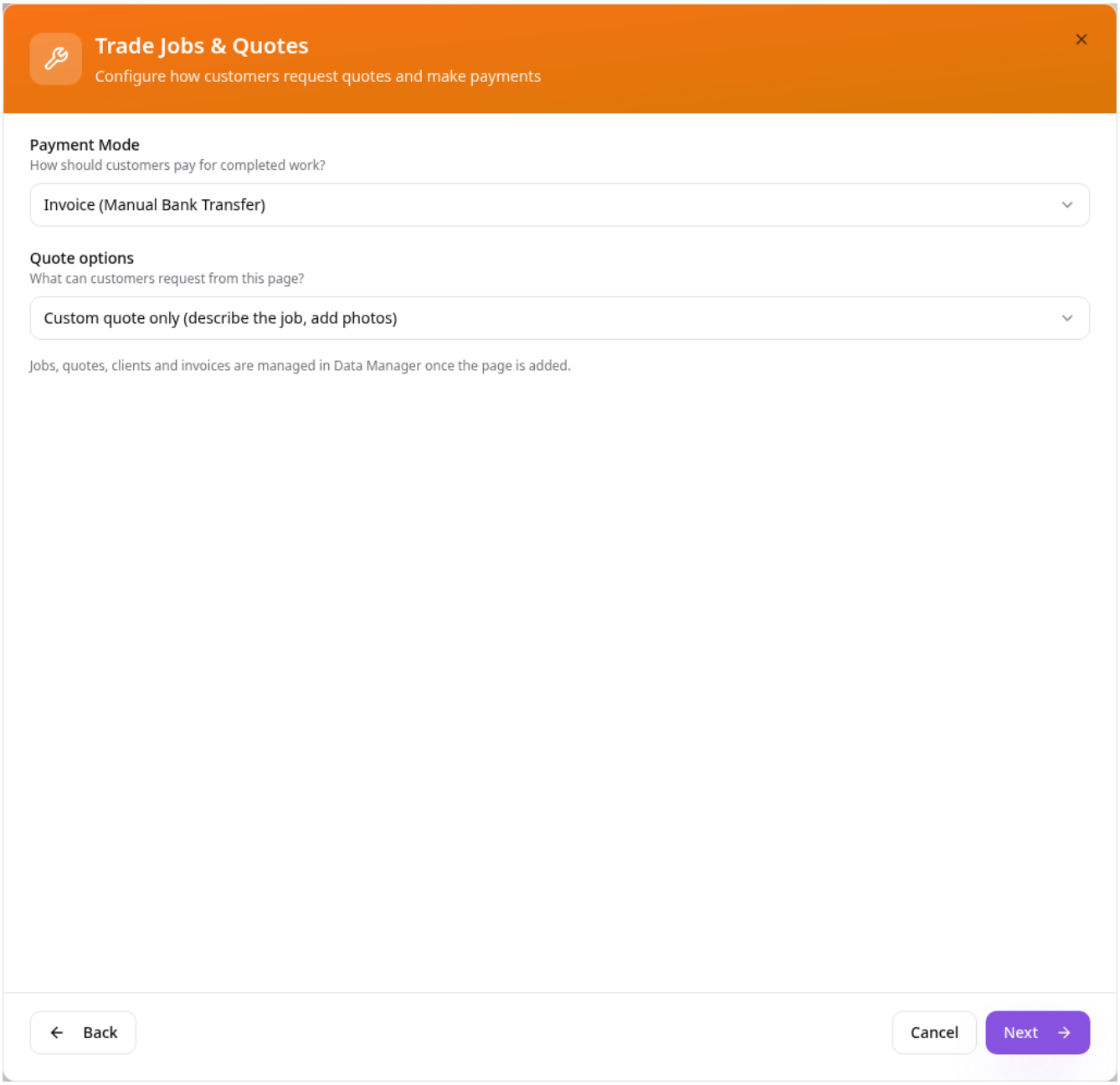
Search for trade and select Trade Jobs & Quotes.



Trade Jobs & Quotes

3. Choose payment and quote options

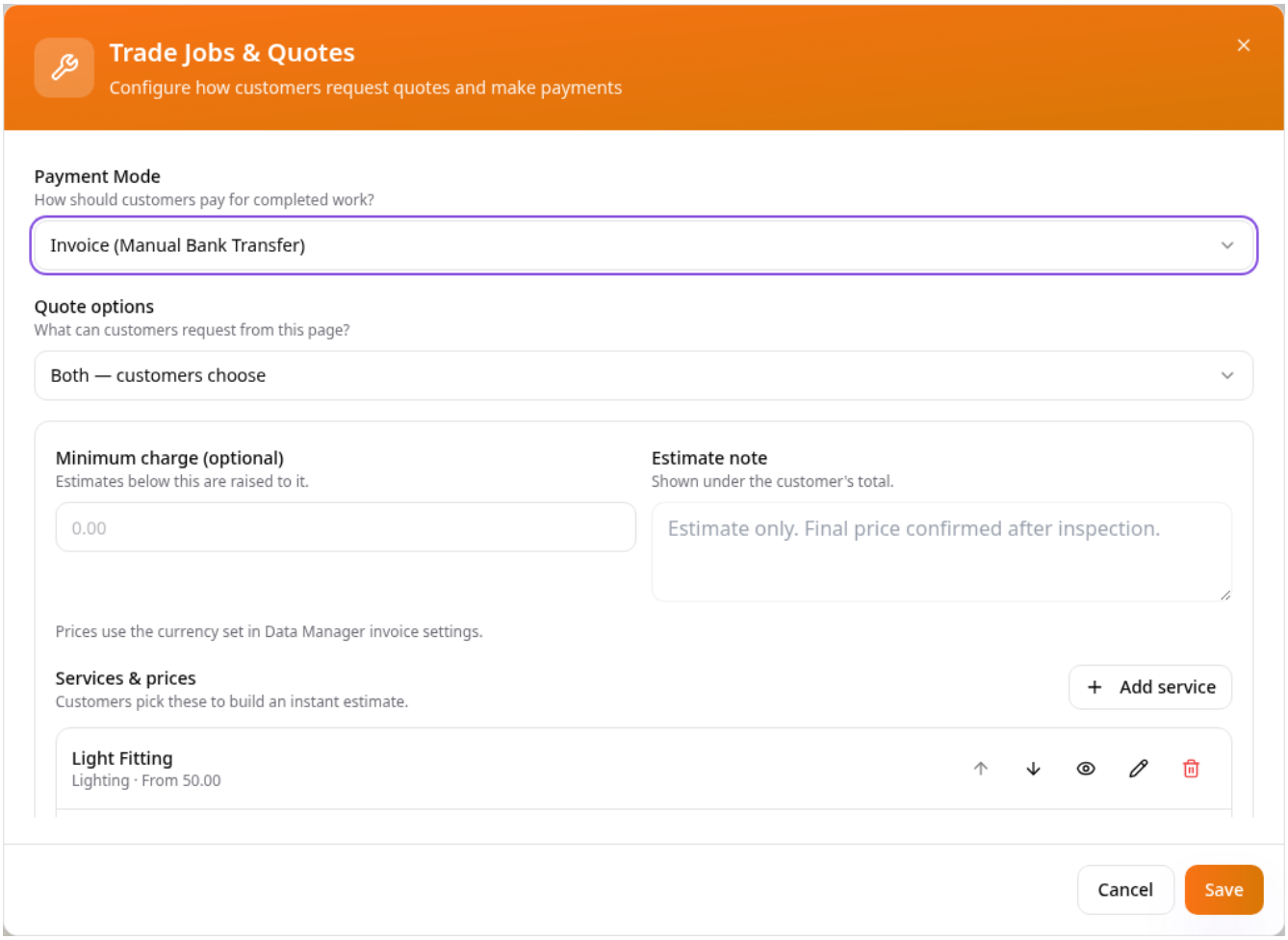
Choose invoice or Stripe payments, then custom quotes, instant estimates or both; this example uses invoices.



Trade Jobs & Quotes

4. Set up instant estimates

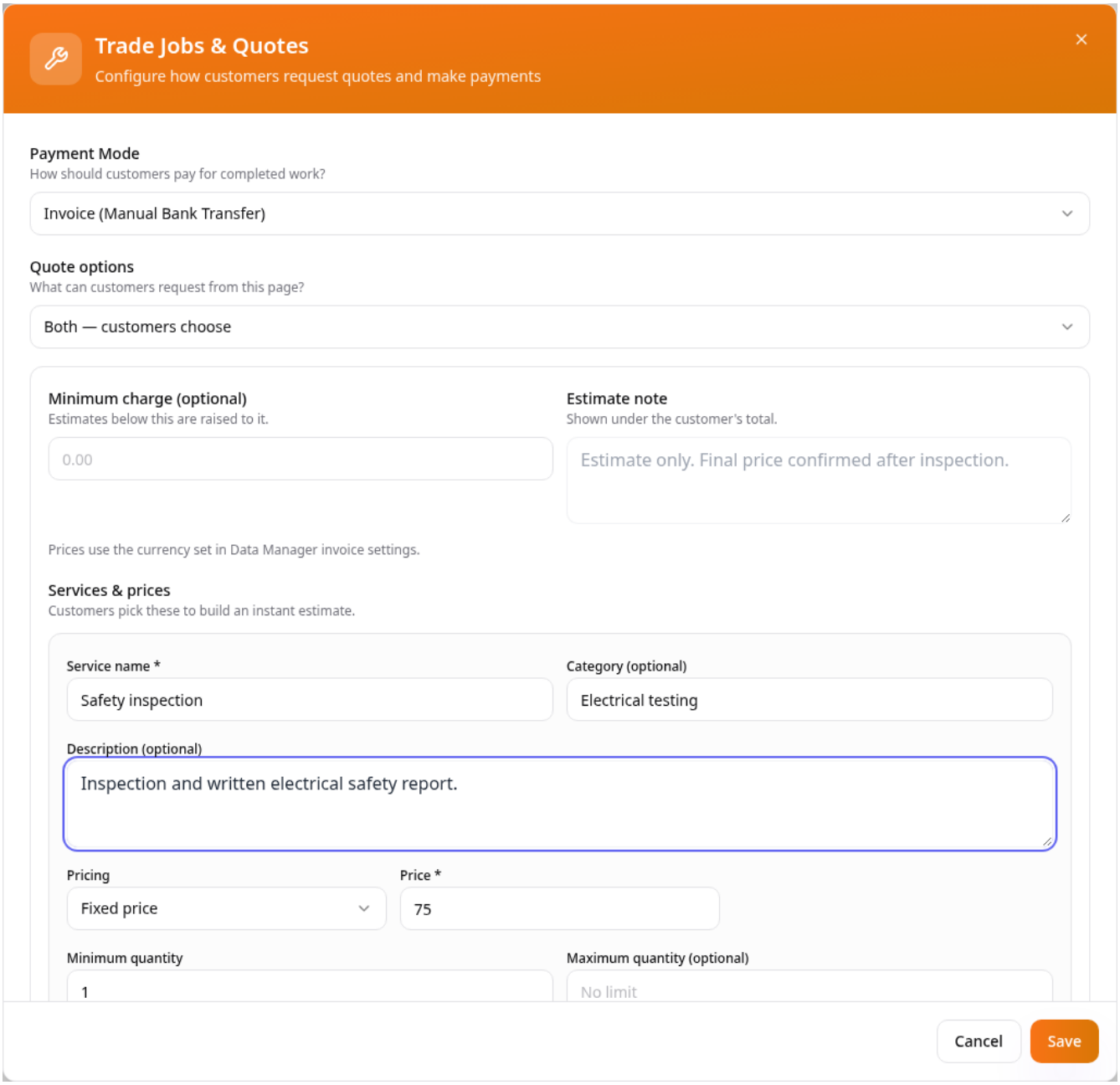
With estimates enabled, set an optional minimum charge and an estimate note; manage your service prices here.



Trade Jobs & Quotes

5. Add a service

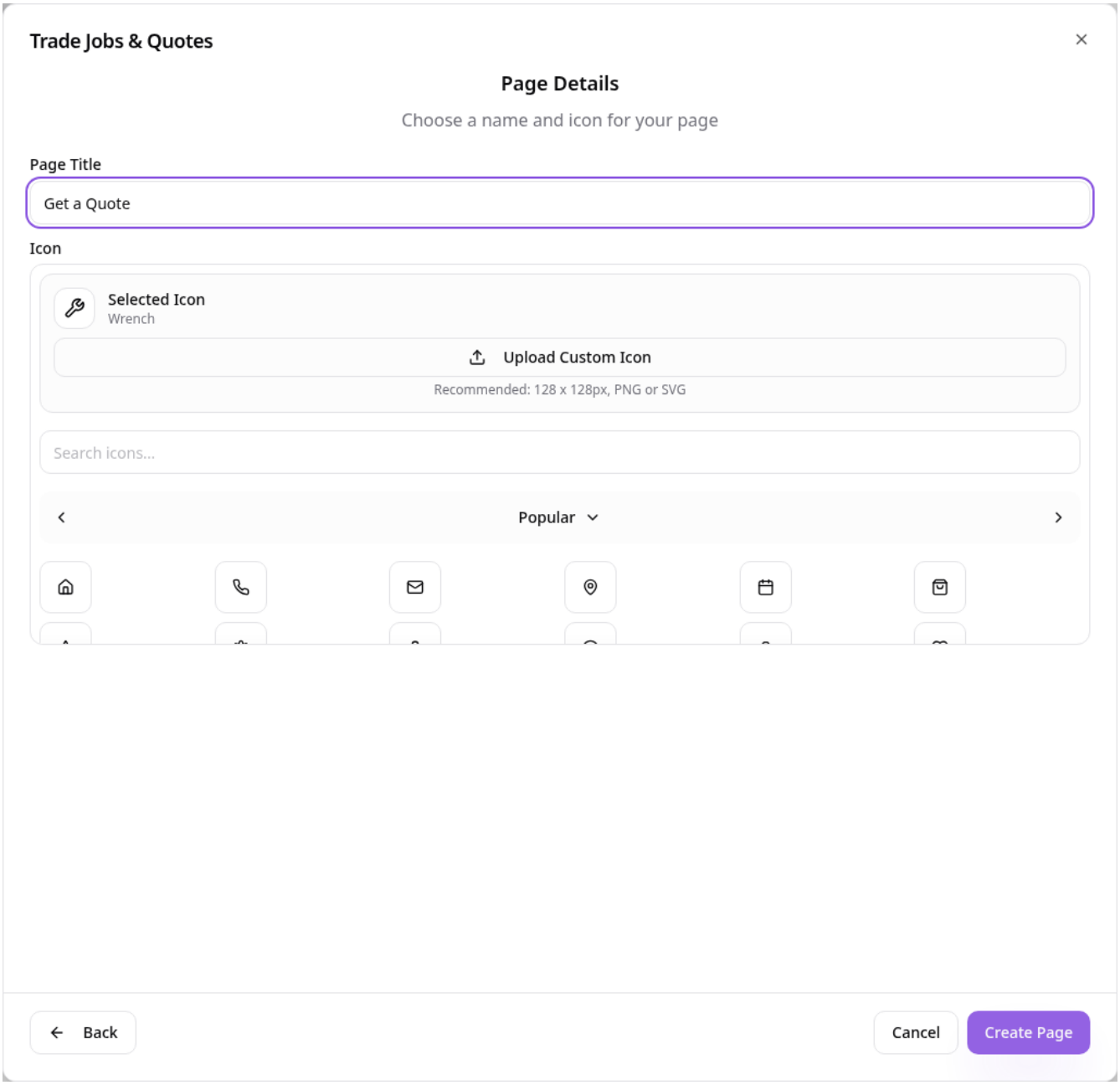
Enter the service name, category, description, pricing and quantity limits; choose Add service to save it.



Trade Jobs & Quotes

6. Name your page

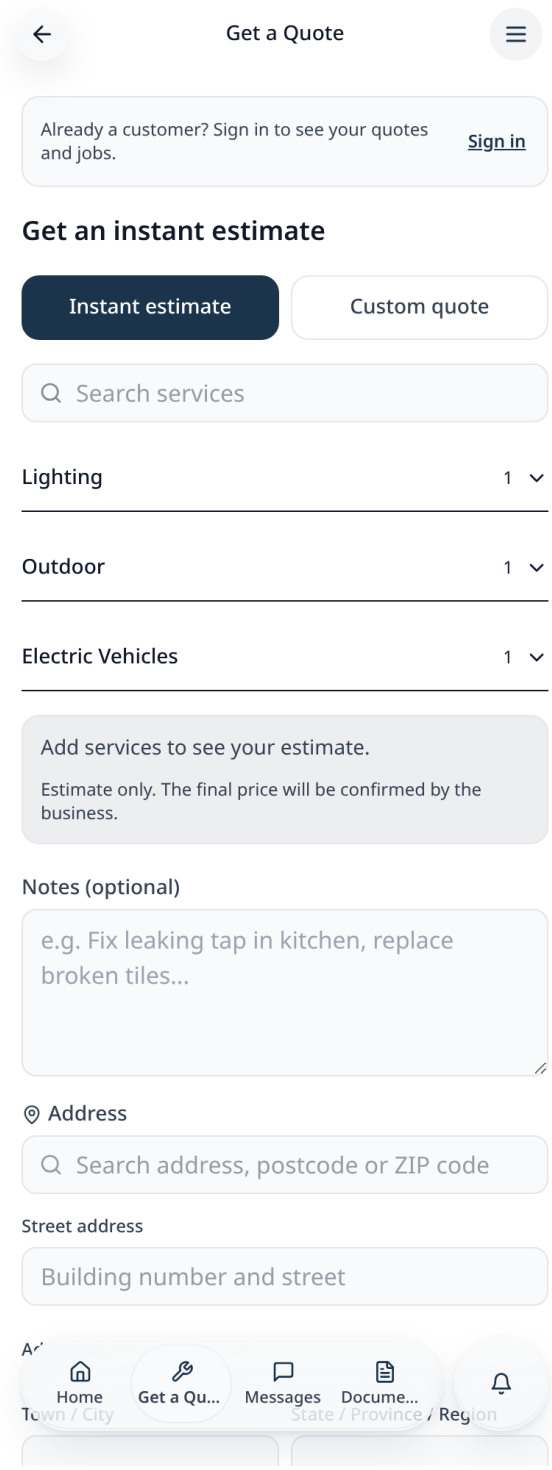
After Next, check the page name and icon, then choose Create Page; this example uses Get a Quote.



Trade Jobs & Quotes

7. Customers browse your services

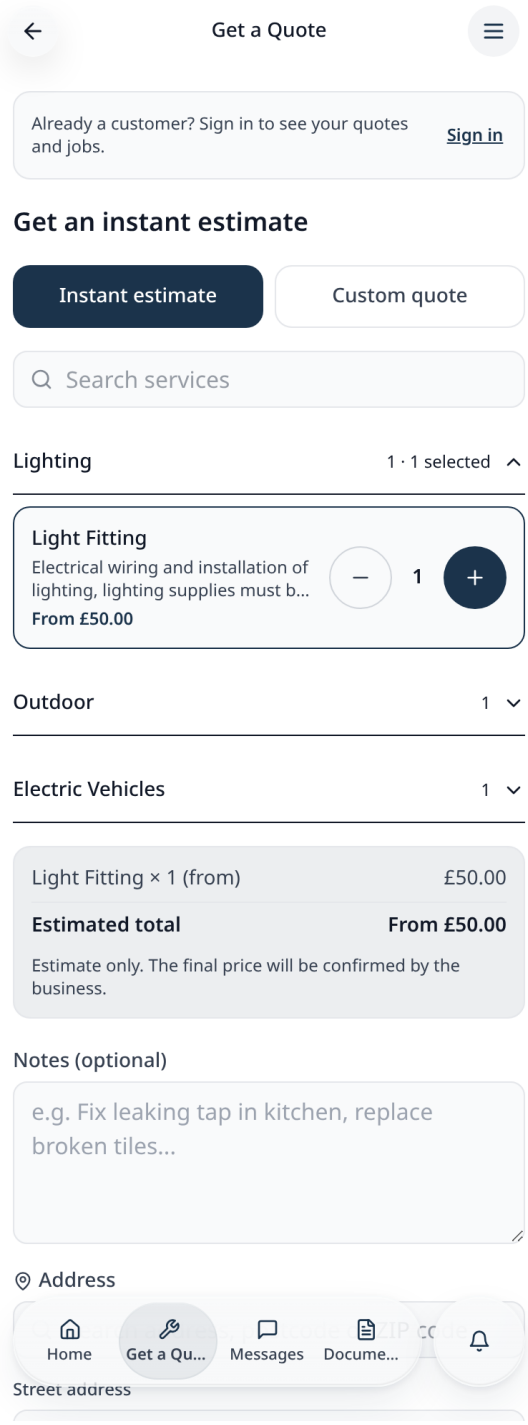
Customers open Get a Quote and choose an instant estimate or a custom quote.



Trade Jobs & Quotes

8. Build an instant estimate

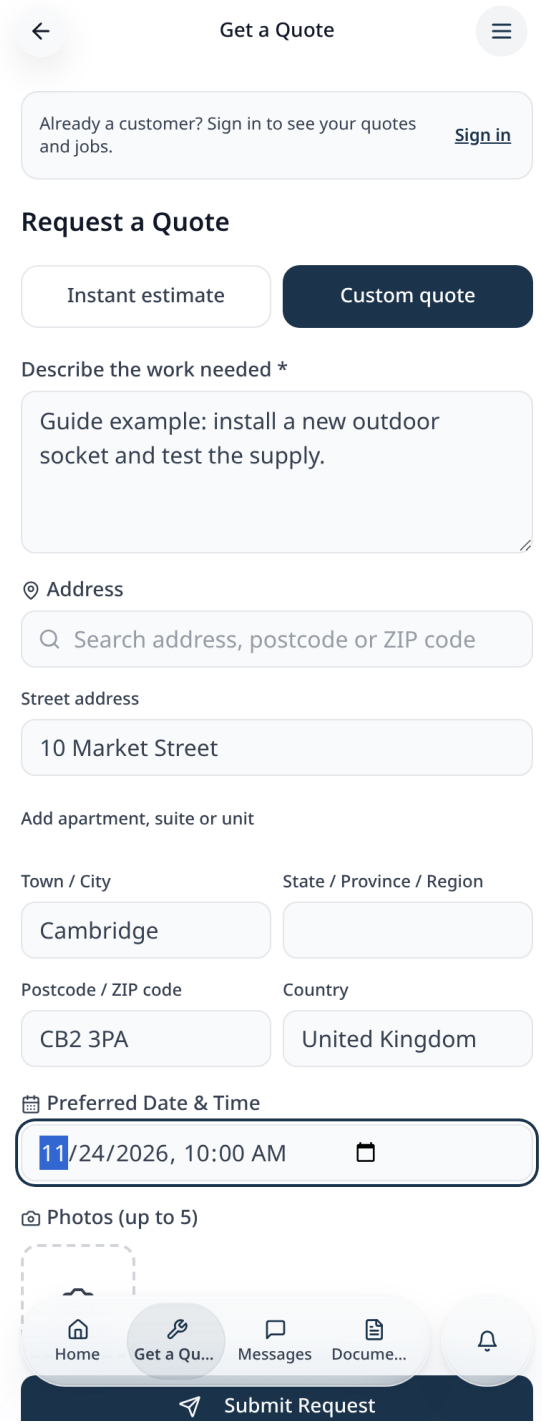
Add a service and adjust its quantity; the estimated total updates before any request is sent.



Trade Jobs & Quotes

9. Describe a custom job

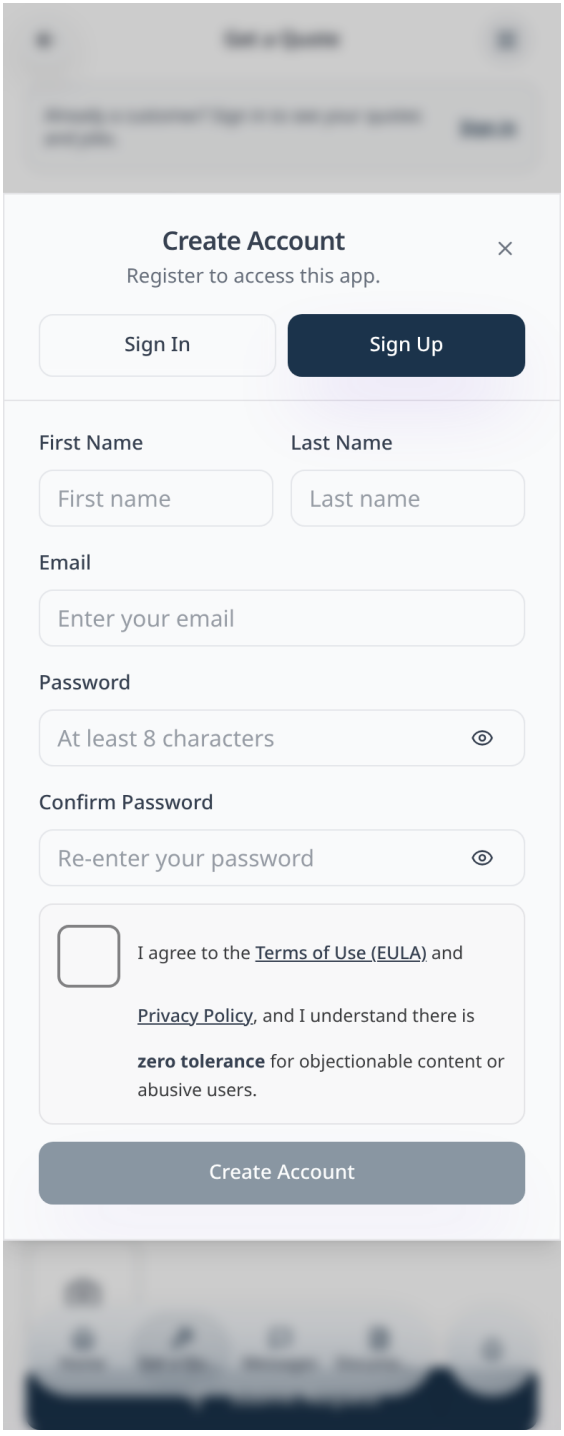
For work without a fixed price, describe the job, add its address and preferred time, and optionally attach photos.



Trade Jobs & Quotes

10. Sign in before sending

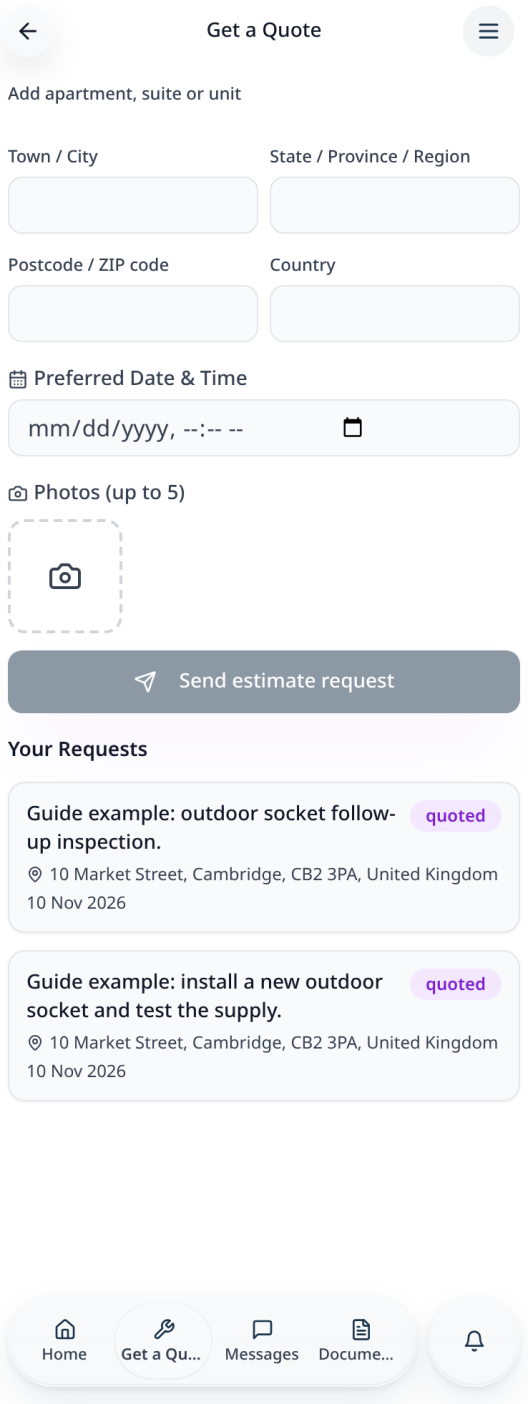
Customers must sign in or create an account before submitting; check the request has appeared under Your Requests.



Trade Jobs & Quotes

11. Check the submitted request

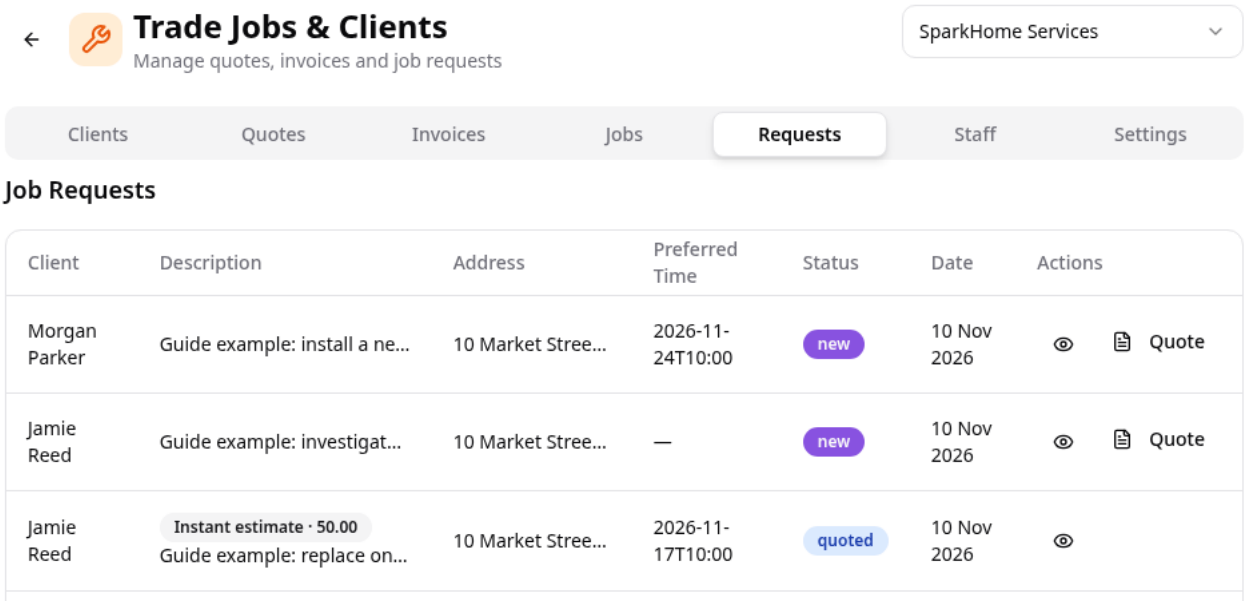
The signed-in customer sees the submitted job under Your Requests, with its current status.



Trade Jobs & Quotes

12. Review requests in Data Manager

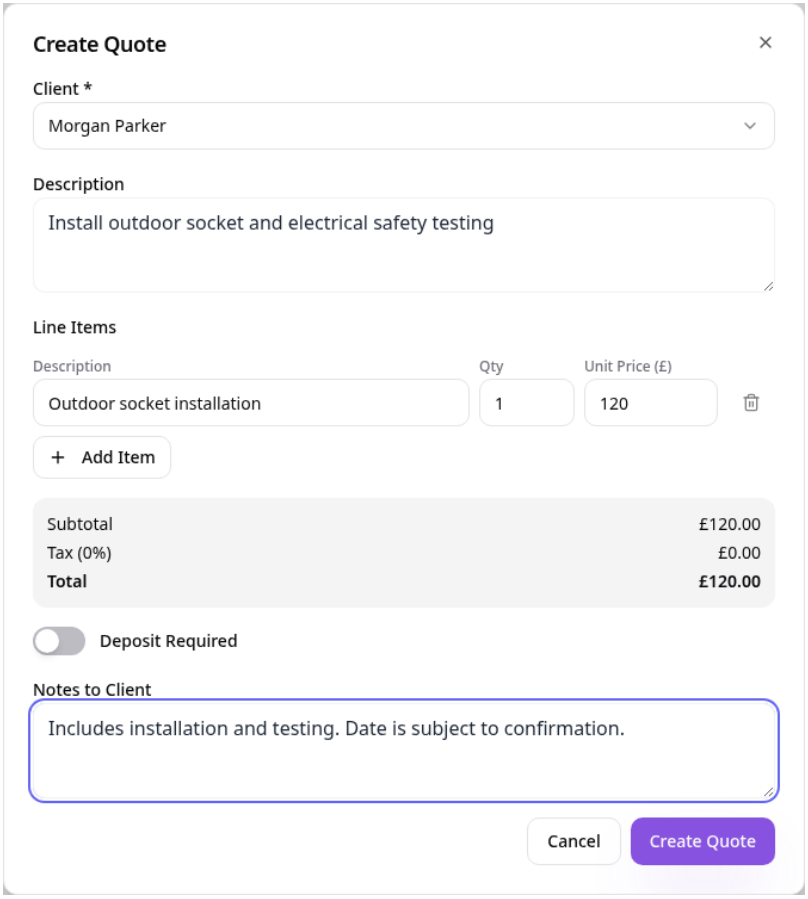
Open Data Manager → Trade Jobs & Clients, select your app, open Requests and choose Quote beside the customer.



Trade Jobs & Quotes

13. Price the work

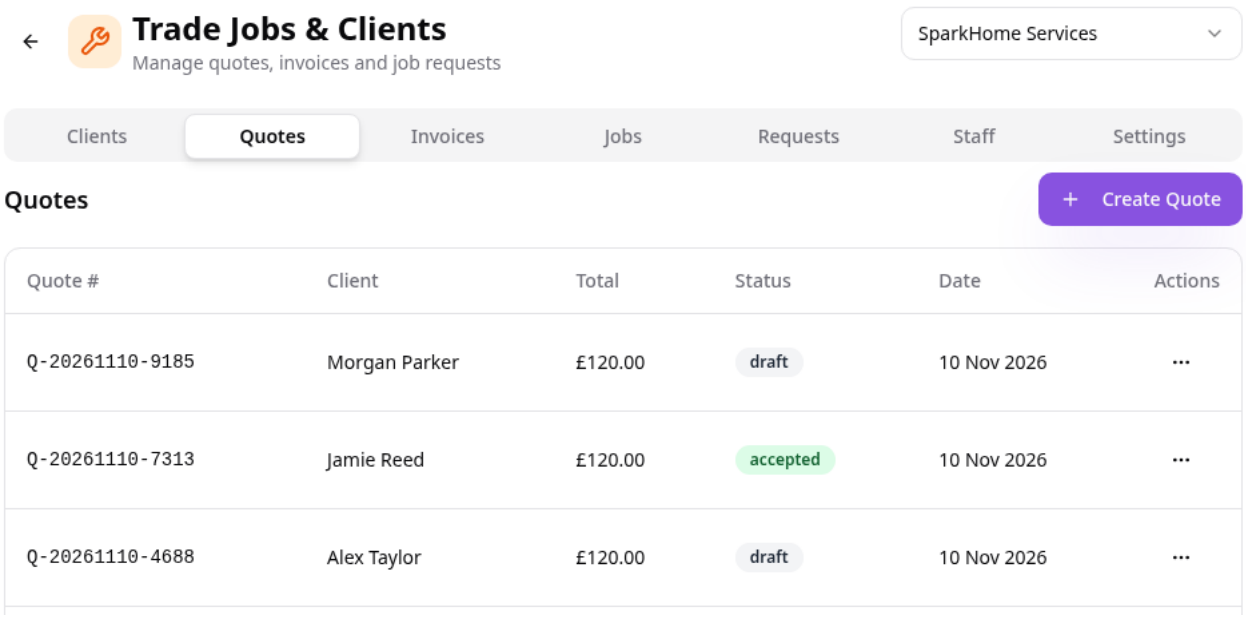
Check the client, description, quantities and unit prices; add any deposit or notes, then choose Create Quote.



Trade Jobs & Quotes

14. A draft quote is created

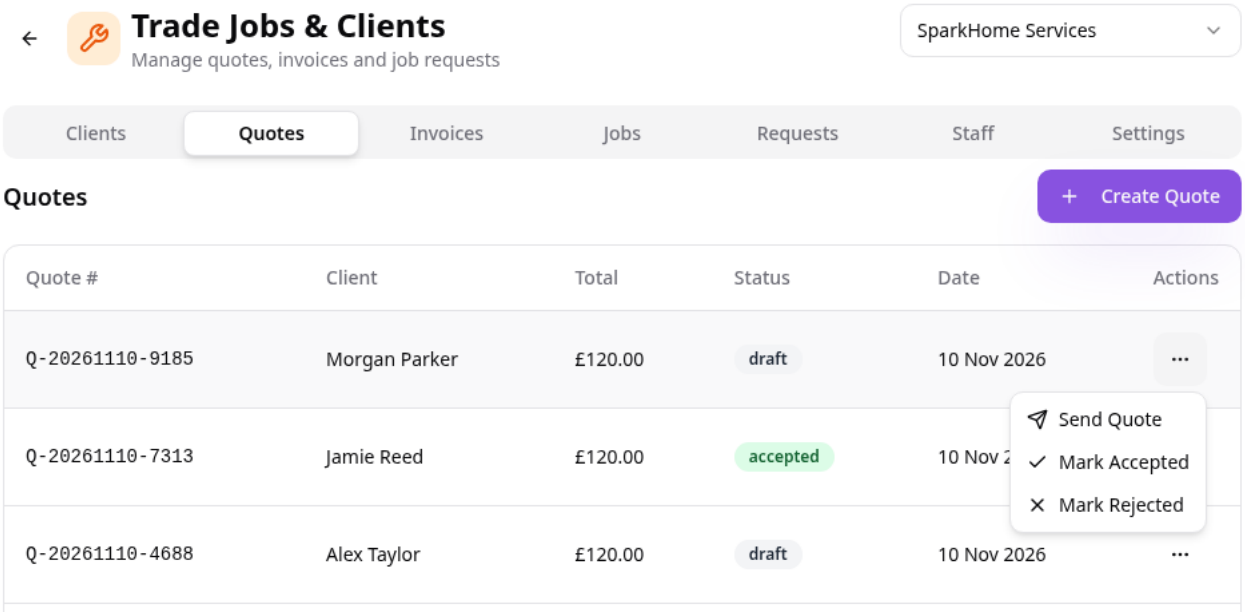
The quote starts as draft; check its customer and total before sending it.



Trade Jobs & Quotes

15. Send the quote

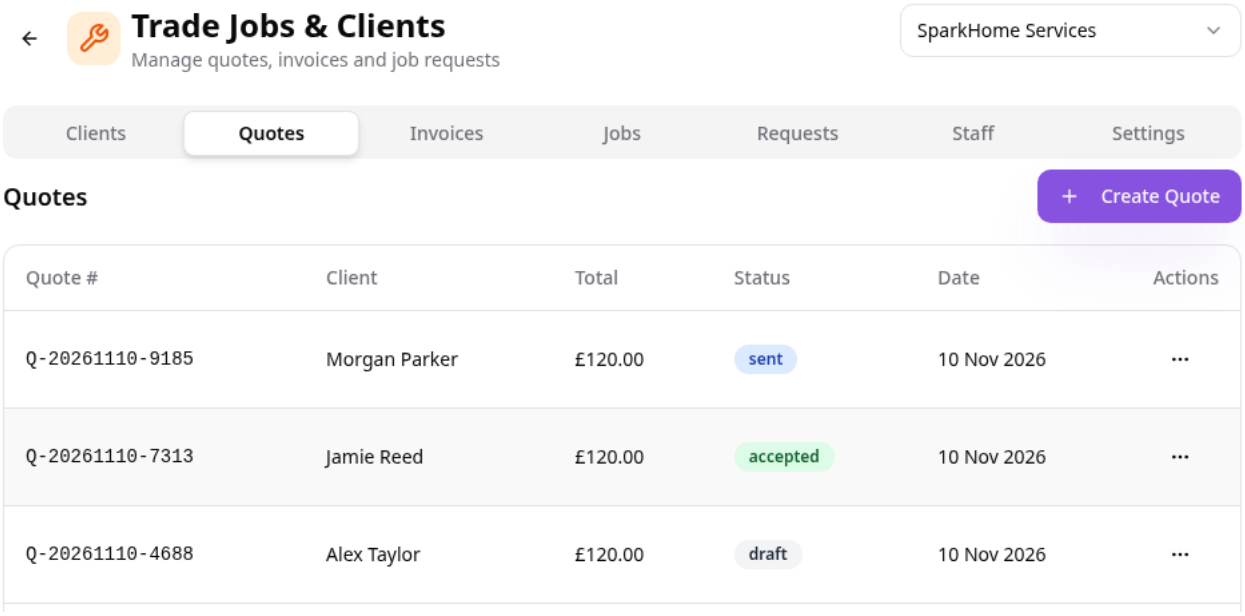
Open the quote’s three-dot menu and choose Send Quote.



Trade Jobs & Quotes

16. Check the sent status

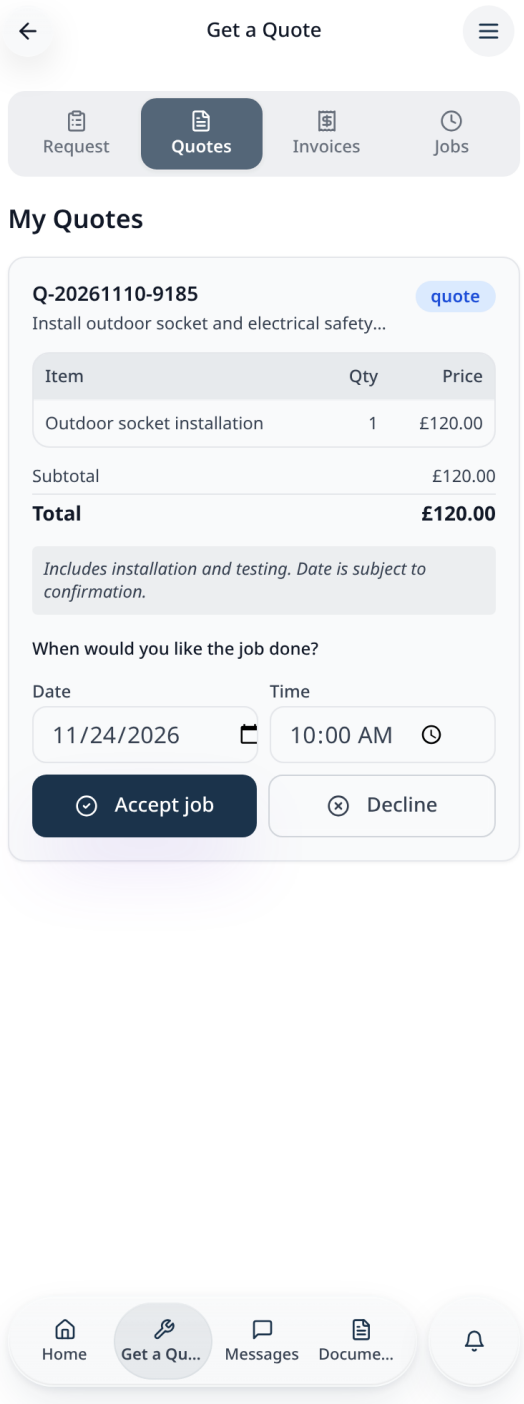
The quote now shows sent, ready for the customer to review in their app.



Trade Jobs & Quotes

17. The customer reviews the quote

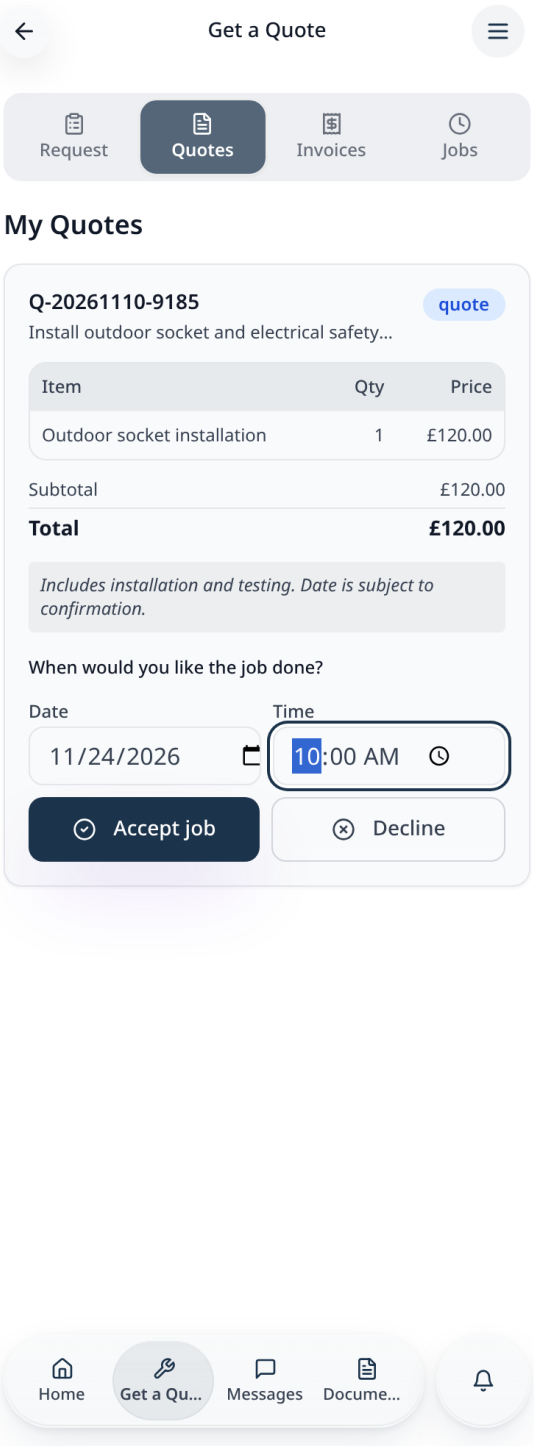
The customer opens Quotes to check each item, the total and any notes; they can accept or decline.



Trade Jobs & Quotes

18. Choose a preferred date and time

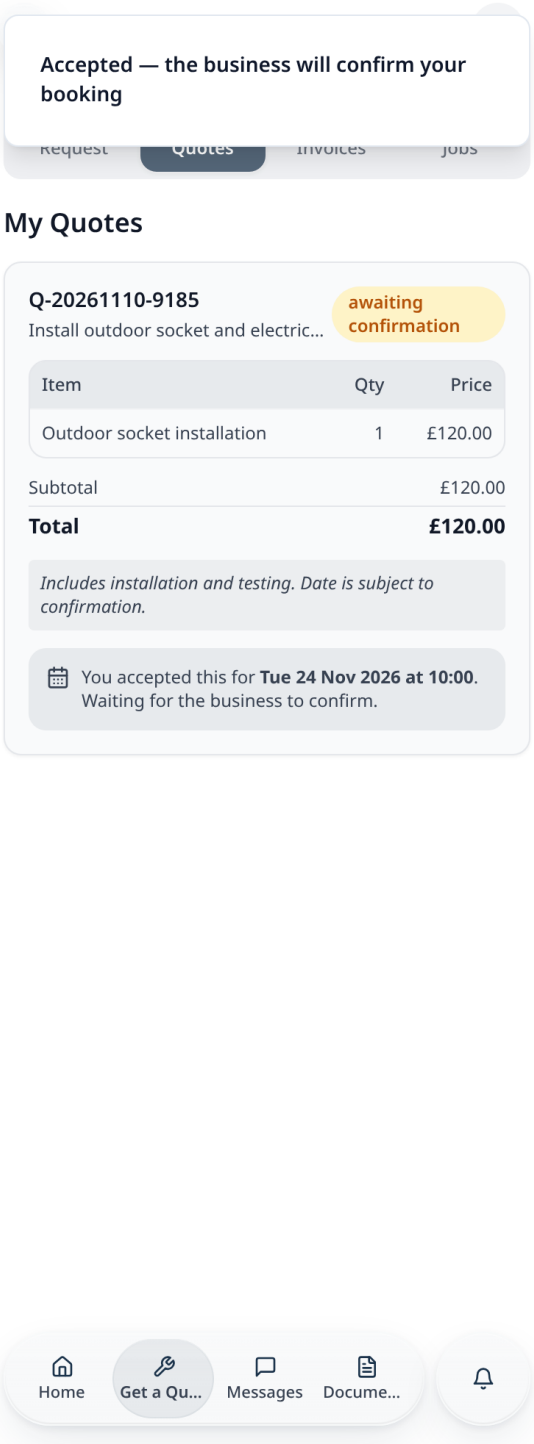
The customer selects when they would like the work done and chooses Accept job.



Trade Jobs & Quotes

19. Acceptance is not yet a booking

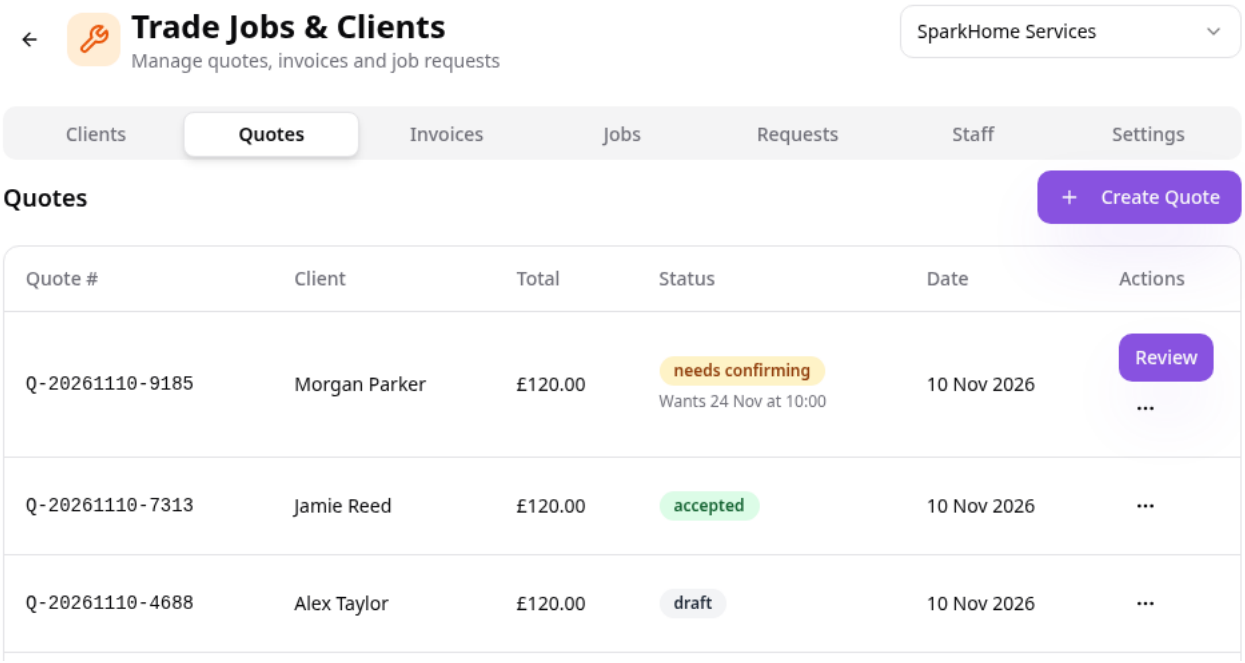
The customer sees that the business still needs to confirm the requested date and time.



Trade Jobs & Quotes

20. Review the customer acceptance

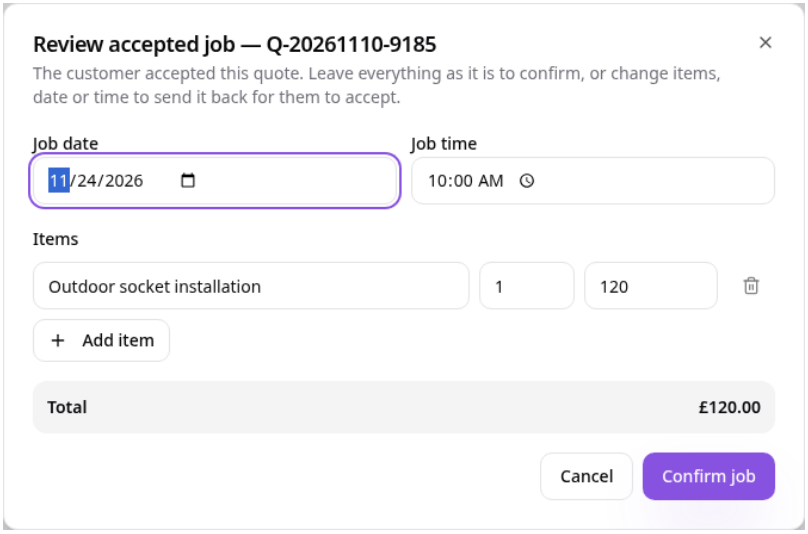
In Data Manager, the quote shows needs confirming; choose Review to check the proposed job.



Trade Jobs & Quotes

21. Confirm as-is or amend

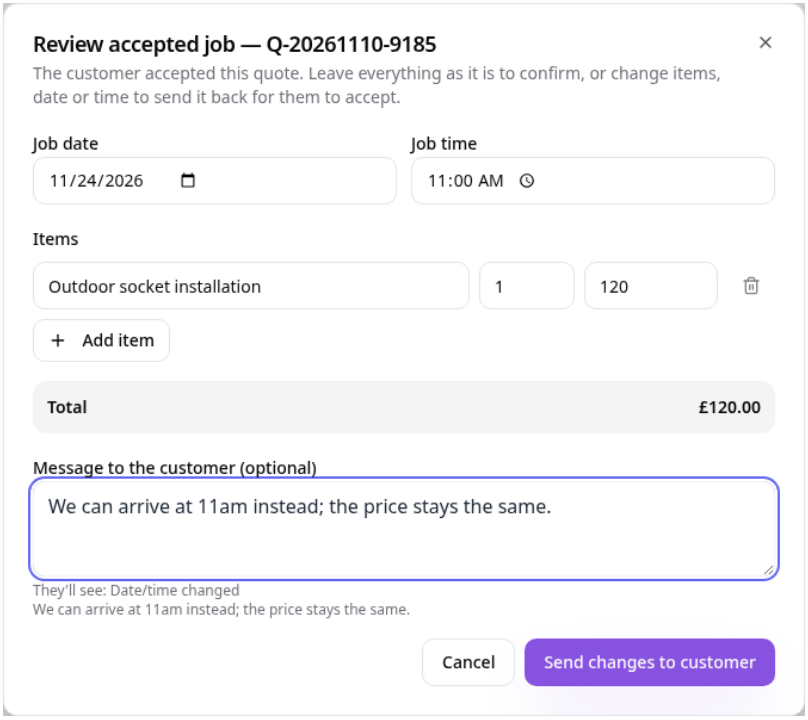
Keep the items, date and time unchanged to use Confirm job, or edit them to propose changes.



Trade Jobs & Quotes

22. Send proposed changes

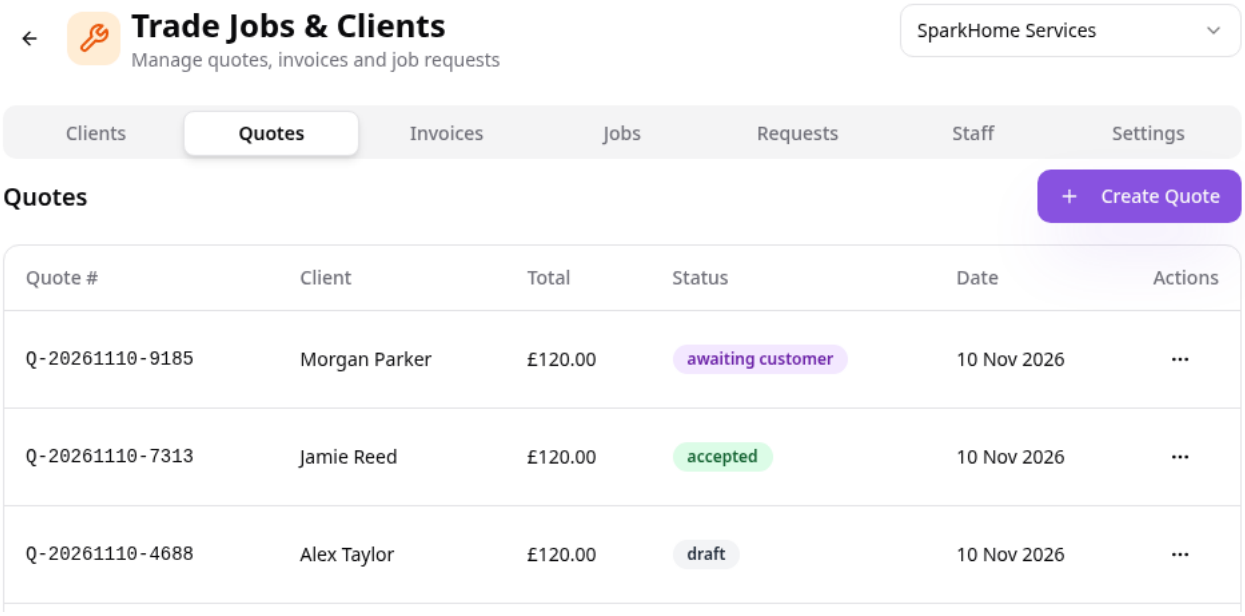
In this example the business proposes 11am instead of 10am, adds an explanation and chooses Send changes to customer.



Trade Jobs & Quotes

23. Wait for the customer’s response

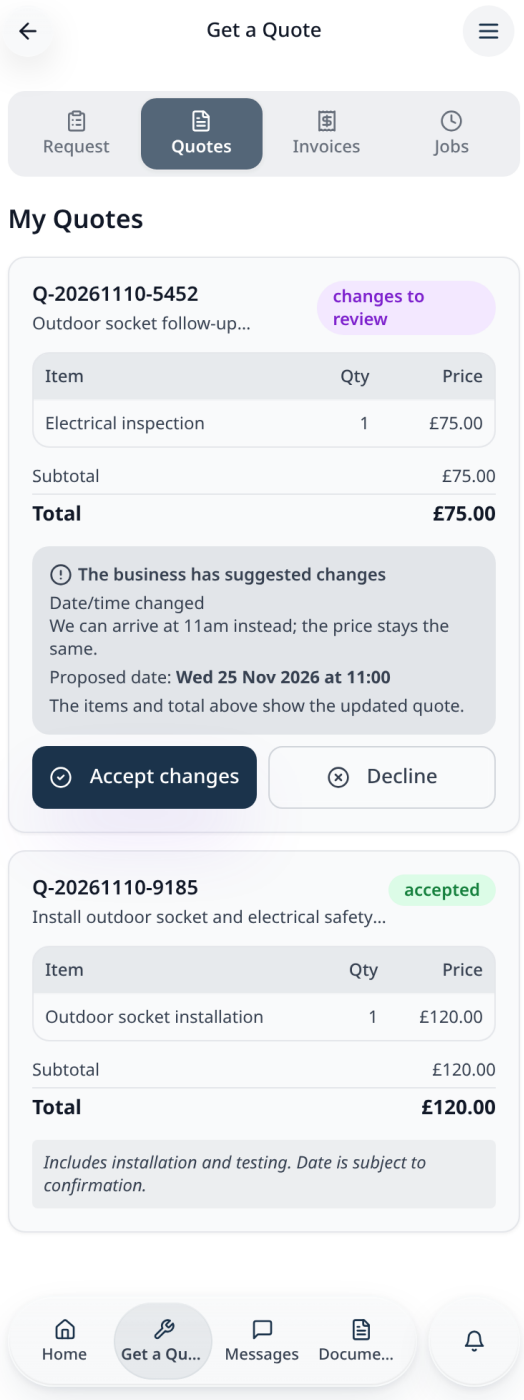
The quote shows awaiting customer until they accept or decline the amended details.



Trade Jobs & Quotes

24. The customer checks the changes

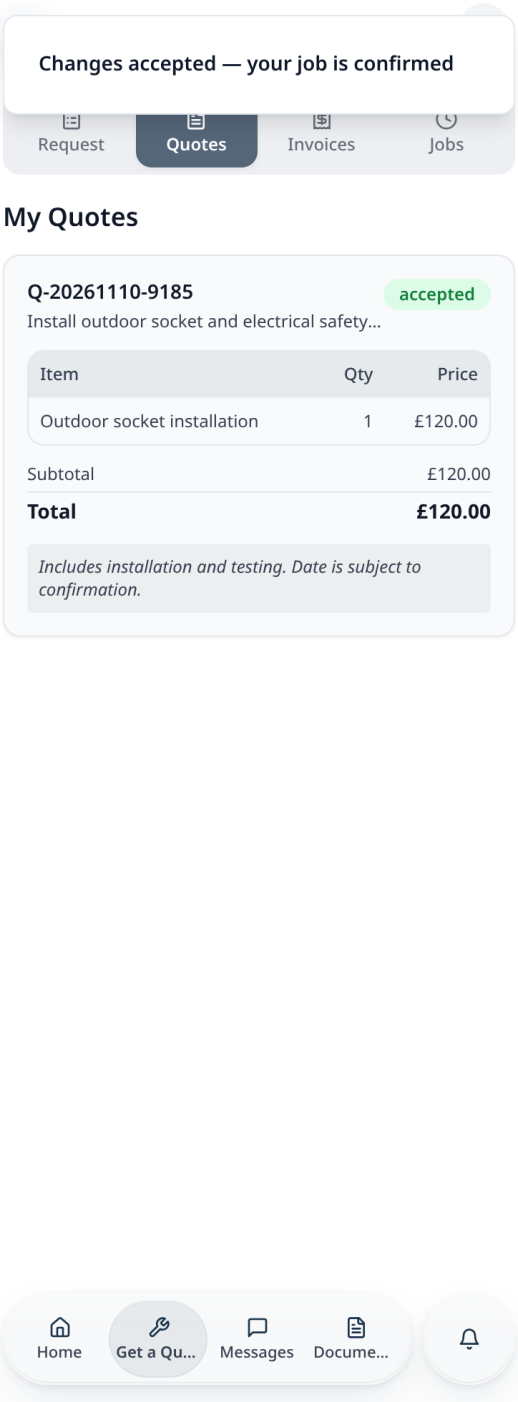
The customer sees the explanation and proposed 11am appointment; this follow-up inspection example shows Accept changes and Decline.



Trade Jobs & Quotes

25. Accepting changes confirms the job

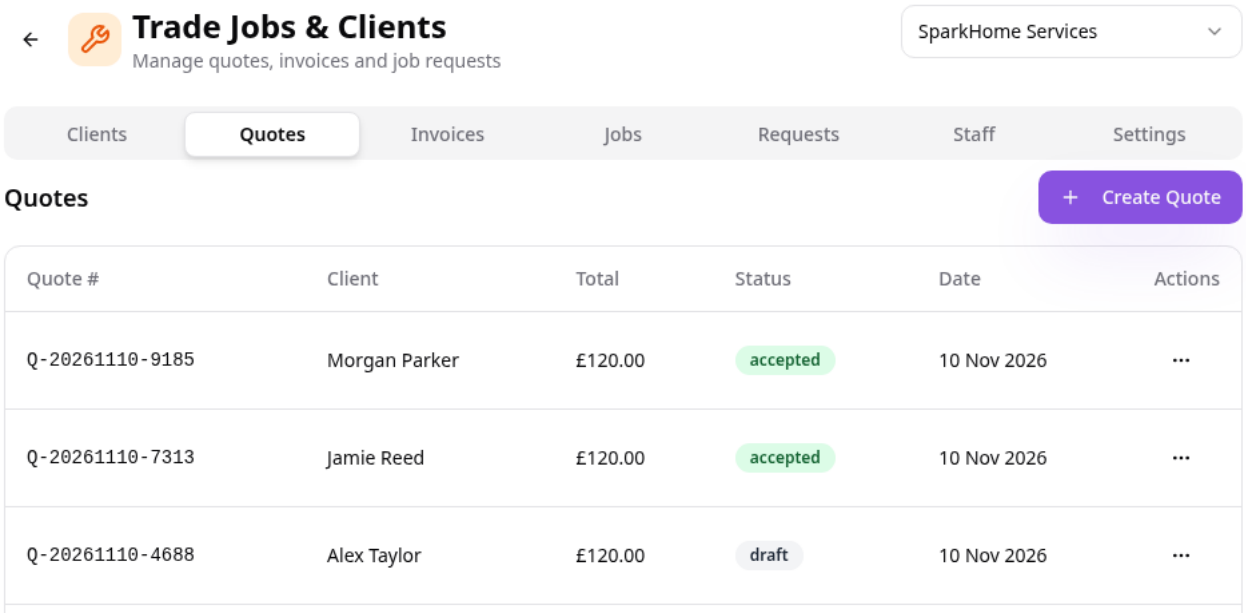
Accept changes confirms the revised job; the agreed details are saved, without another business review.



Trade Jobs & Quotes

26. The quote is accepted

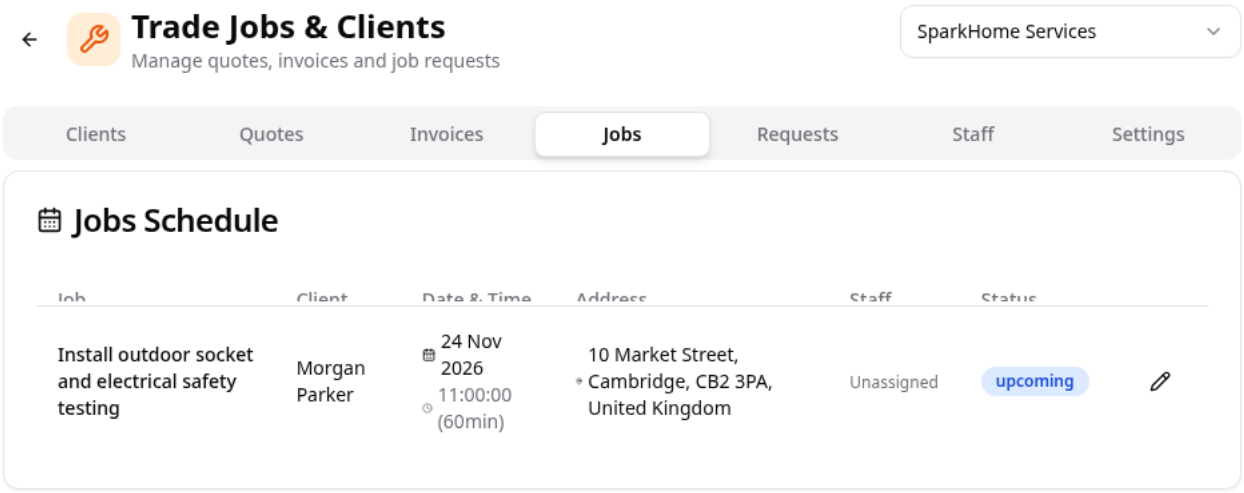
Data Manager now shows accepted; this is different from the earlier needs confirming stage.



Trade Jobs & Quotes

27. The job appears in the schedule

Open Jobs to see the confirmed date and time; staff assignment and job updates are managed here.



Trade Jobs & Quotes

28. Customers see their upcoming work

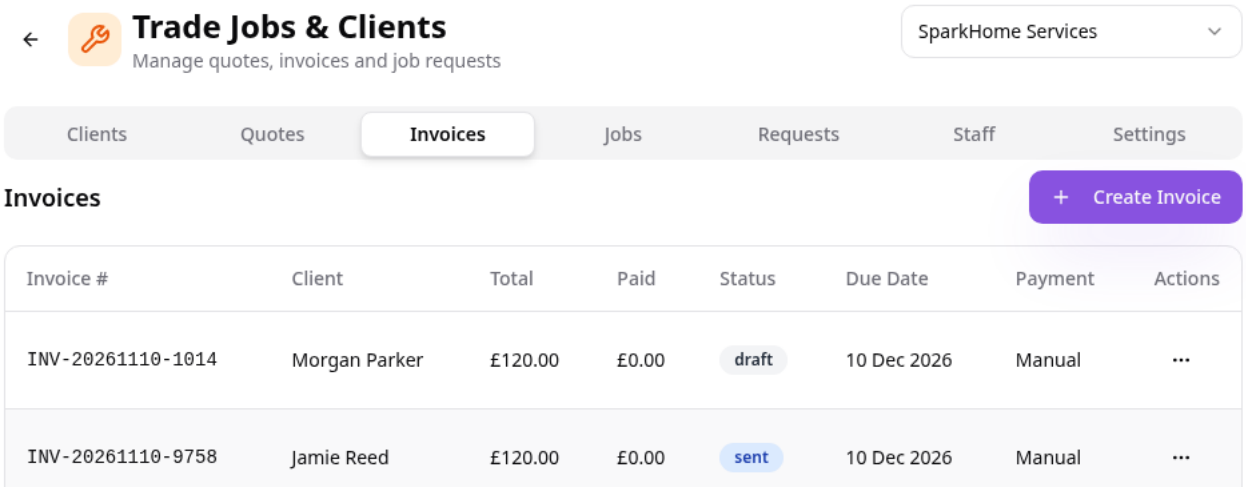
In the app, Jobs shows the confirmed appointment, duration and current status.



Trade Jobs & Quotes

29. Convert the accepted quote to an invoice

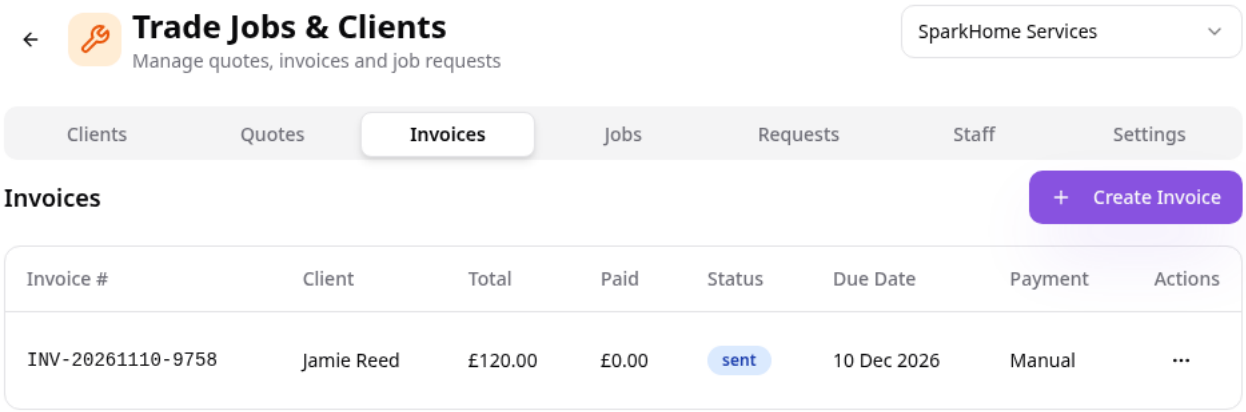
From the accepted quote’s three-dot menu choose Convert to Invoice; the invoice initially appears as draft.



Trade Jobs & Quotes

30. Manage invoices

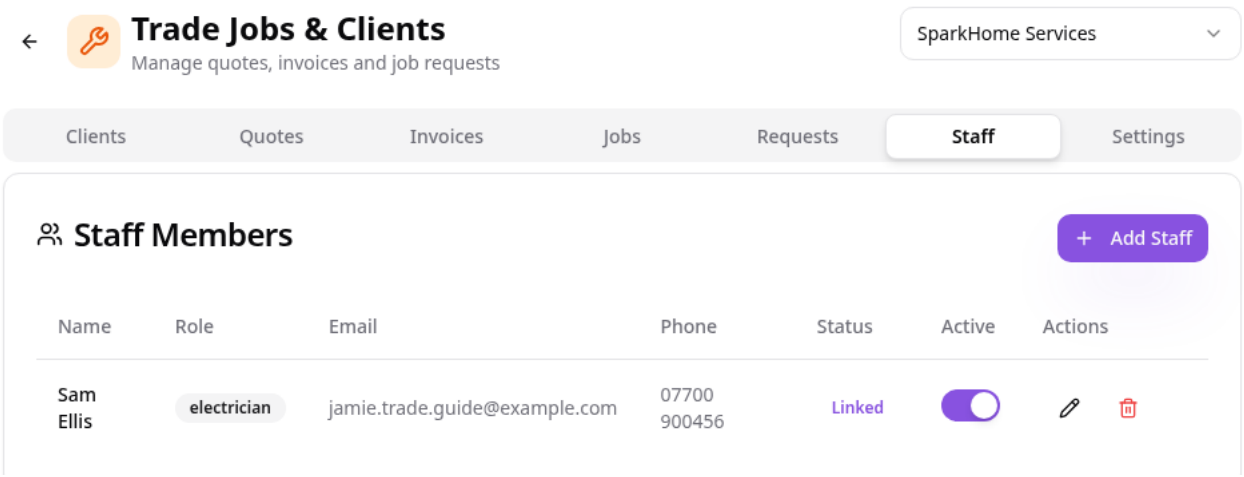
Use Invoices to review amounts, payment progress and due dates; sending an invoice does not itself record payment.



Trade Jobs & Quotes

31. Manage your staff

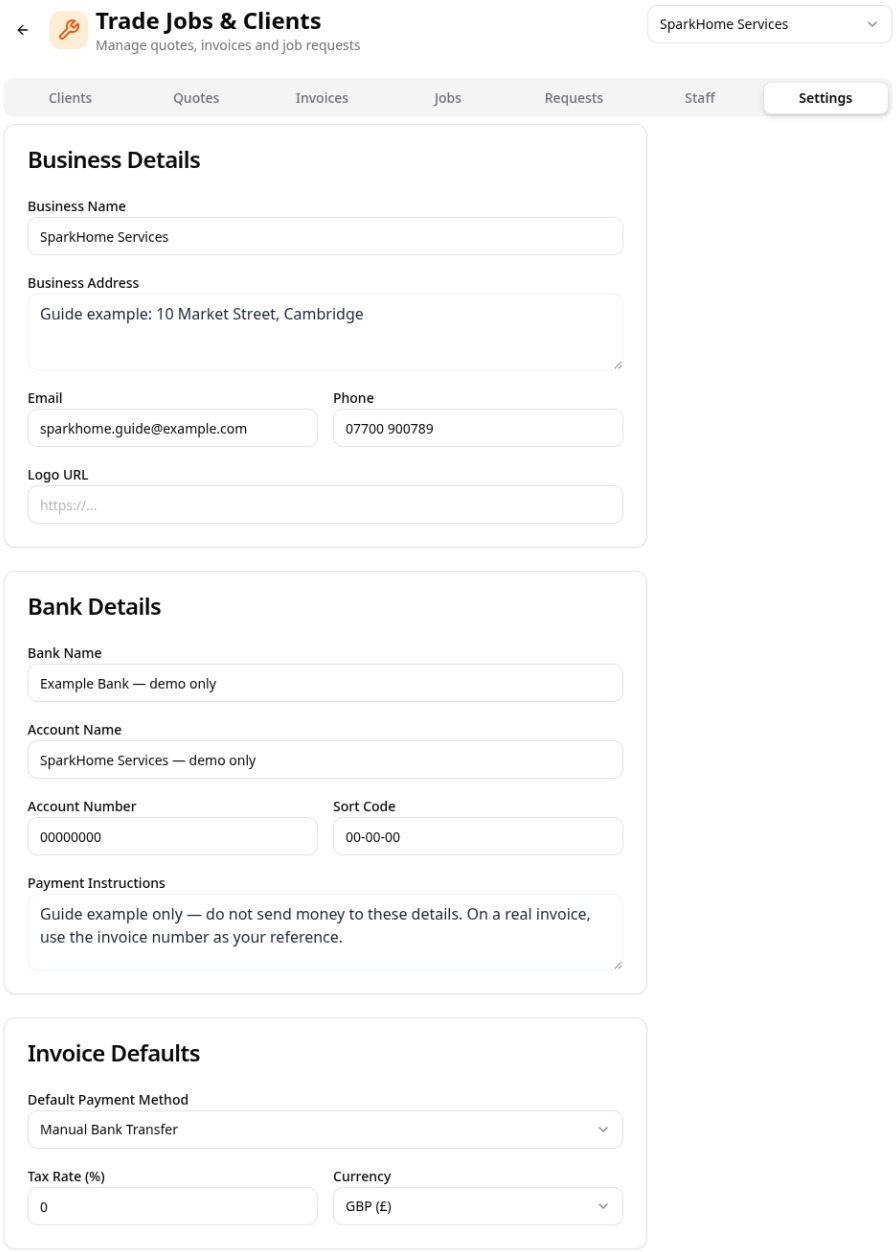
Use Staff to maintain team members and their access, then assign staff to scheduled jobs.



Trade Jobs & Quotes

32. Set invoice details

Use Settings to enter business and payment details, currency and tax; use your real details rather than these demo examples.



Edit services and quote options in Edit Page Content. Manage incoming requests, clients, quotes, staff, jobs and invoices in Data Manager; accepting a date request and confirming a job are separate stages unless the customer accepts your proposed changes.