

# CREATIVE FREEDOM SETUP

Follow this checklist to complete your initial setup and start benefiting from day one. Ensure you have your service list, rates, and website editing access.

[Click the underlined text to open help articles.](#)

## Business Basics and Services



- Business Details**  
Complete your business details, including studio address and social media links.
- Services & Packages**  
Add all your different services and rates. This ensures clients can easily select them during the enquiry stage and simplifies the process of building quotes.
- Terms & Conditions**  
Add your wedding booking terms and conditions, which can be signed digitally within WedQuarters.

## Financial Setup

[Click here to watch the initial setup tutorial](#)

- Finance Details**  
Add your banking details (if not accepting payments via the app) and tax information to streamline your payment process.
- Take Payments via the App**  
Connect Creative Freedom to Stripe to accept payments via the app, the preferred method for brides. This also enables automatic payment reminders, improving payment tracking.
- Payment Terms**  
Set up payment terms to automatically break down your quotes, calculating what's due and when.

[Click here to watch the initial setup tutorial](#)

## Forms and appointments

- Create an Enquiry Form**  
Personalise your enquiry form and embed it into your website for a seamless client experience, making it easy for potential clients to reach you.
- Create Pre-Quote Questionnaire and other Questionnaires**  
Create specific forms or questionnaires to gather important information before consultations, streamlining your preparation and collecting all necessary details.
- Setup Availability Schedule**  
Create a schedule that shows only your available dates and times, making it easy for clients to book appointments.



## Personalisations

- Email Setup & Templates**  
Personalise your email templates, set up your private email domain, and add your email signature. Enable automatic appointment reminder emails to maintain a professional experience for your clients.
- Personalise your WedQuarters**  
Customise the WedQuarters to align with your brand, providing clients with a consistent and professional portal experience.
- Personalise Calendar and Connect to Google Calendar**  
Change the colours of different booking types and connect to Google Calendar to keep your schedule organised and easily accessible.
- Save Wedding Morning Scheduler Settings**  
Set up our most loved feature, the Wedding Morning Scheduler, to ensure smooth and organised wedding day preparations.
- Setup Mileage Calculator**  
Add your travel charge details to easily calculate mileage and add it to quotes, ensuring accurate and transparent billing for travel expenses.
- Setup SMS Notifications**  
Make sure important messages and quotes are never missed by setting up SMS notifications.
- Create a Thanks for Your Enquiry Workflow**  
Create your first automatic workflow to send a “thank you” email to potential clients for their enquiry, showcasing your professionalism and promptness.

## Testing and Adding Bookings

- Create a ‘Dummy’ Enquiry and Use All Dashboard and Record Card Features**  
Create a dummy enquiry to see the enquiry process in action, familiarising yourself with the dashboard and record card features.
- Amend and Send a Quote and Accept on Bride’s Behalf**  
Amend and send your first quote, then accept it on the bride’s behalf to understand the process from your client’s perspective.
- View a Client’s Experience After the Quote is Accepted**  
Watch a video showcasing your client’s experience and all the features they can utilise, gaining insights into the client journey.
- Add Your Current Bookings and Onboard Your Brides**  
Add your upcoming booked brides and wow them with their new wedding portal.