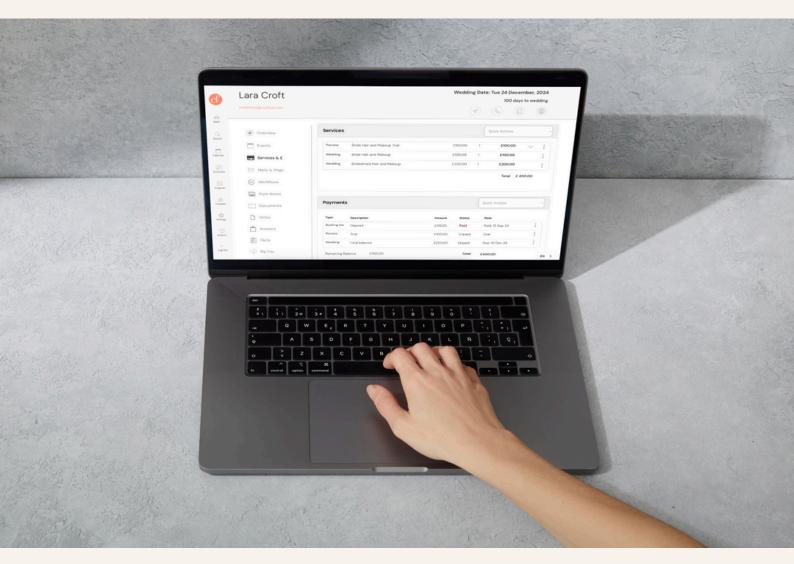
CREATIVEFREEDOMAPP.COM





CREATIVE FREEDOM APP

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.



<u>Personalise Calendar</u> and <u>Connect to Google Calendar</u>

Change the colours of different booking types and connect to Google Calendar to keep your schedule organised and easily accessible.



Save <u>Wedding Morning Scheduler Settings</u>

Set up our most loved feature, the Wedding Morning Scheduler, to ensure smooth and organised wedding day preparations.



Setup <u>Mileage Calculator</u>

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



<u>Create a 'Dummy' Enquiry</u> and Use <u>All Dashboard and Record Card Features</u> 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 <u>Client's Experience After the Quote is Accepted</u>

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.