

Ready-made admin and payment toolkit

# Cash Flow Kit for Your Business

A custom cash flow kit designed for FreshStart Auto Spa to help the business quote more clearly, invoice more professionally, and follow up on payments with less friction.

Quote and invoice support   WhatsApp-first workflow   Built for a mobile service business

Prepared for

## **FreshStart Auto Spa**

A practical admin toolkit created to help the business look more organised, communicate more clearly, and get paid more professionally.

How to use this kit

## **Use one consistent system from quote to payment**

Use the templates and scripts together so customers always know what they are receiving, what they owe, and what the next step is.

## Main deliverable

# Full cash flow kit

This kit is designed to make quotes, invoices, payment tracking, and payment follow-up feel cleaner and more professional.

### Included separately in this kit

- Editable quote template in Word format
- Editable invoice template in Word format
- Editable payment tracker spreadsheet

These are included as separate working files so they can be edited and reused properly during business.

### Quote-send WhatsApp script

Hi, thanks for your enquiry. Please find your quote attached. Have a look and let us know if you'd like to go ahead with the booking. If you have any questions before confirming, we're happy to help.

### Quote follow-up script

Hi, just checking if you had a chance to look at the quote we sent. If you'd like to go ahead, we can help you confirm your booking and the next step.

### **Payment request script**

Hi, please send proof of payment once payment has been made so we can confirm and proceed. If you need the banking details again, let us know and we'll resend them.

### **Overdue reminder message**

Hi, this is a friendly reminder regarding the outstanding payment for your recent booking. If payment has already been made, please send proof of payment. If not, please let us know when we can expect it.

### **3-step reminder flow**

- Reminder 1: friendly follow-up shortly after payment is due
- Reminder 2: firmer reminder if there is still no response
- Reminder 3: final polite reminder before escalation or pause in service

### **Payment tracker**

An editable tracker is included separately to help you keep record of client bookings, balances due, follow-ups sent, and payment status.

## Extra support to make the kit more useful

These extras help the product feel like a practical operations toolkit, not just a pair of templates.

### How to use this kit

Use the quote template when pricing work before the booking is confirmed. Use the invoice template once the work is agreed or completed. Use the scripts to keep communication clean and consistent so the customer always knows the next step.

### Optional payment policy wording

- Full detailing bookings require a deposit to secure the slot
- Full payment is due on completion unless agreed otherwise
- Quotes remain valid for a limited period and may need to be refreshed if delayed

### Professionalism note

A cleaner quote and invoice process builds trust, makes your business look more organised, and reduces confusion around money.

## **Copy-paste message section**

- Quote send
- Quote follow-up
- Payment request
- Overdue reminder

Prepared by BusinessSorted. This kit is designed to help the client quote more clearly, follow up more consistently, and get paid more professionally.