



STAFF GUIDE · GRADESPACE TRADES

Running your website: a guide for your team

Everything your team needs to run the website day to day, in plain words.

Gradespace Trades
for WordPress, version 0.1.0

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This guide covers the website day to day: quote requests, the pipeline, quotes, survey visits and the rest of the site. You don't need any technical knowledge.

Features marked **(Pro)** need a Pro or Agency licence.

1. Signing in

- Go to your website's address followed by **/wp-admin** (for example `yourbusiness.co.uk/wp-admin`).
- Sign in with your own username and password. Please **don't share accounts**: the website records who did what, and each person should only see what their job needs.
- After signing in you go straight to **Trades → Today**.
- Forgotten your password? Click **Lost your password?** on the sign-in page. After 5 wrong passwords, sign-in pauses for 15 minutes.

2. Your daily start: Trades → Today

- **New quote requests**, newest first.
- **Quotes waiting for an answer** (Pro).
- **New messages** from the contact form.
- A warning when an **area page needs its own words**, and (for administrators) when finished requests are **due for review**.

The numbers on the left-hand menu show how many things are waiting.

3. Quote requests

When someone asks for a quote

They choose the kind of job, give the postcode, when they'd like it done, a budget if they want to, describe the job and can add a few photos. They get an email copy straight away, and the request is emailed to the person it's given to (see "Who gets new requests" below).

Working on a request

Open **Trades → Enquiries** and click a request. You see:

- **What they sent**: contact details, postcode and area, the job, when, budget, the description and the **photos** (click one to see it full size). Photos are private: only staff who can see the request can open them.
- **Looking after it**: move it to the next stage, give it to someone, add a note for the team, or **email the customer** (a new request then becomes "Contacted" by itself).
- **History**: every change, note and email, with who did it and when.

The stages

New → Contacted → Survey booked → Quoted → Won or Lost, then **Job done** once the work is finished. A request only moves to stages that make sense (for example, it can't be "Job done" before it's won). A lost request can be reopened as "Contacted".

Some moves happen by themselves: booking a survey visit, sending a quote, and the customer accepting (Won) or declining (Lost) it online.

Who gets new requests

Set **Trades → Settings → Quote requests → Give new requests to**. With **Pro**, each service area can send its requests to its own person: open the area under **Trades → Service areas** and choose **Give them to**. People with the **Estimator** role see only the requests given to them.

The pipeline board and spreadsheet (Pro)

Trades → Pipeline board shows every job as a card in its stage, with the quote value. Drag a card to another column (or use its menu) to move it. **Download CSV** gives you the list as a spreadsheet.

4. Quotes (Pro)

1. In the request, click **Write a quote**.
2. Add a line for each thing you'll do or supply: what it is, how many and the price each. Tick **Add VAT** if you charge VAT, and check the **Valid until** date.
3. **Save the draft** to come back to it, or **Save and email it to the customer**.

The customer gets a link to a page with your logo and details, the lines, VAT and total, your terms, and buttons to **Accept** or **Decline**. They can print it or save it as a PDF. You're emailed when they answer, and the request moves to Won or Lost.

A sent quote can't change (so the customer never sees a price move under them). To change it, click **Change it**: the old one is withdrawn and a new draft starts from it. Quotes past their date can't be accepted online.

Set your VAT rate, VAT number, quote numbers and terms under **Trades → Settings → Quotes**.

5. Survey visits (Pro)

- In a request, click **Email them a link to choose a time**. The customer sees your free survey times and picks one; they get a calendar invite and a reminder the day before, and can cancel from the same link.
- Agreed a time on the phone? Enter the day and time under **Book the visit**.

- Two customers can never get the same time, and the travel time you set is kept free after each visit.
- Set your survey hours, how long a visit takes, travel time and days off under **Trades → Settings → Survey visits**. **Trades → Survey visits** lists every visit.

6. Reviews

- Add your review pages (Google, Checkatrade, TrustATrader...) under **Trades → Settings → Reviews**. The **Review us** block on the Reviews page links to them.
- **(Pro)** Once a job is marked **Job done** (or Won, if you prefer), the customer is emailed a thank-you with those links after the days you choose. It goes **once per job**, never twice. You can also press **Send it now** on the request.
- Add the reviews customers give you as **Testimonials** (Trades → Testimonials), in their words and with their permission.

7. Your website's content

- **Services** (Trades → Services): what you do, a "from" price (0 shows "Price on quote"), what's included and how long it usually takes.
- **Service areas** (Trades → Service areas): a page for each town you cover. **Write each one's own words** — a few sentences about the homes, the jobs you do there and how quickly you can be there. Pages without their own words (or with another town's words and the name changed) are flagged and hidden from search engines until they have them. To add many towns at once, use **Add areas from a list**: they're added as drafts for you to write and publish.
- **Projects** (Trades → Projects): your work, with **before** and **after** photos, the service and the area (so it also shows on that area's page). Never show a customer's street or house number.
- **Accreditations** (Trades → Accreditations): schemes you belong to, with your registration number, a link to check it and the logo the scheme gave you (follow its rules for using it).
- The **Call and WhatsApp bar** at the bottom of phone screens uses the numbers in **Trades → Settings → Contact**.

8. Personal data

- Requests that are finished (done or lost) and haven't changed for the months you set (Trades → Settings → Records) are listed under **Enquiries → Due for review**. Nothing is deleted automatically: an administrator ticks what there's no reason to keep and deletes it (typing DELETE to confirm). Keep won jobs as long as your guarantees and accounts need them.

- If someone asks for their data or to be forgotten, use **Tools → Export Personal Data** or **Erase Personal Data** with their email address. Erasing deletes their requests with the photos, quotes and survey visits.