Photography Simple CRM

An excel based solution, which is macro free, to enable you to keep on top of your photography shoots. If this sounds like what you need, take a look at the details below.

Monitor the status of all your leads and jobs

Auto generate quotes and invoices using templates

See upcoming shoots on a calendar

Understand where your jobs are coming from

Spot your busy periods, for quoting and jobs

See a list of jobs by category (where they are in the process)

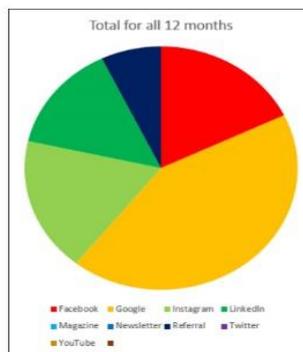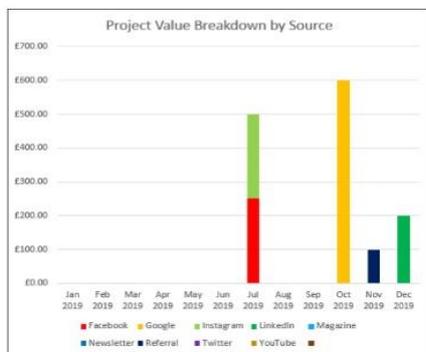**See how much money is currently owed to you**

Store useful details about each job

Control various settings to adapt as required

A one-stop-shop for all your photography projects

And so much more...

Scroll down to see more about this product
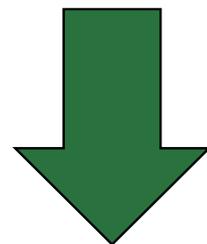

Photographers, keep on top of your jobs, quotes, invoices, and analytics.

spreadsheetsolutions.biz/store

SPREADSHEET SOLUTIONS

Client Details

Each client needs a unique name

Business Name	Contact Person	Email Address	Contact Number	VAT Number	Address
Your Client	Mr Client		0750 123 4567	123 4567 89	1 High Street, London, SE1 1AB
The Other Business	Mrs Client		0750 234 5678	234 5678 90	2 High Street, London, SE1 1AB
Another Client	A. Client		0750 345 6789	345 6789 01	3 High Street, London, SE1 1AB
ABC Business	B. Client		0750 456 7890	456 7890 12	4 High Street, London, SE1 1AB
XYZ Business	C. Client		0740 567 8901	567 8901 23	5 High Street, London, SE1 1AB

This spreadsheet consists of various tabs, most of which are automated to show you what you need to know when you make the selection. There are two data entry tabs. One for a list of your clients, and one for a list of your enquiries/jobs that you can assign to a listed client. Above you can see part of the client list. Simply enter the client details, giving each client a unique business name (you can use their name there too if not a business). The clients entered here will then be available to select for each entered job. Not only that, but the spreadsheet will keep running totals of what you have done for each client.

Project Details

Status	Job No	Client	Service	Date of Shoot / Job Date	Input deposit % / Deposit %	Quote Date	If Required Rejected / Date	Deposit Invoice Inv. Date	Paid Date
Done	000001	Your Client	Headshots	Mon, 29/07/2019	10.00%	01/06/2019		10/06/2019	15/06/2019
Done	000002	The Other Business	Product Shoot	Tue, 15/10/2019	10.00%	01/10/2019		03/10/2019	07/10/2019
Done	000003	Another Client	Family Shoot	Thu, 07/11/2019	10.00%	04/11/2019		06/11/2019	06/11/2019
Final	000004	ABC Business	Event	Wed, 18/12/2019	10.00%	10/12/2019		14/12/2019	16/12/2019
Deposit	000005	XYZ Business	Team Shoot	Wed, 08/01/2020	10.00%	20/12/2019		20/12/2019	

The next tab is the main data entry tab. This sheet will combine with the settings tab and the client list, to complete all the other tabs on the spreadsheet. You simply enter the details for a single project per line. Simple as that. Many of the fields have drop down lists, so just select the relevant option, or input the text or value. As the job progresses, you can continue to update each project with the relevant date.

This not only uses the data for the other tabs, but also shows you the status of each job. This means that you can easily see which jobs are at which stage of the project, and what the next step is.

Thanks so much for allowing me to quote on this project.
Please see the details below, and consult my terms and conditions attached.

Description	Details	Quoted Price
Commission fee for headshots for approx. 18-24 people.	Take headshots of Your Client's staff, and supply two options for each staff.	£500.00
Travel Costs	Train and taxi costs	£30.00

Location of Shoot	Image Format & Resolution	Total Quote Value (Exc. VAT)
1 High Street, London, SE1 1AB		£530.00
	Images will be provided in digital format (Jpeg), downloadable from Dropbox.	**NO VAT CHARGED** £0.00
Date of Shoot 29/07/2019 - 02/08/2019	Low resolution images are normally provided at 72ppi and high resolution at 300ppi. If you have specific requirements in terms of format, file size or resolution please let me know.	**BALANCE DUE (EXC VAT)** £530.00

There is a page to create a quote. How long does it take you to put a quote together? If you have updated the respective job details, all you need to do here is select the job number, and the quote populates with the details entered and is ready to be saved as a PDF and sent to the client. You can combine this with your full terms and conditions if you like, but there is a place for you to insert a link if your T&Cs are on your website.

This could serve as your quote, or with other documents, but it shows all the details entered into the job database.

To: Your Client

Your Client VAT Number
123 4567 89

Attn: Mr Client

Add: 1 High Street, London, SE1 1AB

DATE	DESCRIPTION	DETAILS	COST
29/07/2019 - 02/08/2019	Commission fee for headshots for approx. 18-24 people. Location: 1 High Street, London, SE1 1AB Time: 08:00 - 16:00	Take headshots of Your Client's staff, and supply two options for each staff. Images will be provided in digital format (Jpeg), downloadable from Dropbox. Low resolution images are normally provided at 72ppi and high resolution at 300ppi. If you have specific requirements in terms of format, file size or resolution please let me know.	£500.00

Then when it comes to invoicing, simply use the invoice template, and select the job and which invoice (deposit or completion), and it will populate accordingly. It will use the details as used on the quote, as to complete the process.

This too can then be saved as a PDF and sent to the client. As you enter the date for the invoice (on the job database), it updates the status of the job so that you know where you are with each job.

Invoiced v Paid per Month

Quotes v Shoots per Month
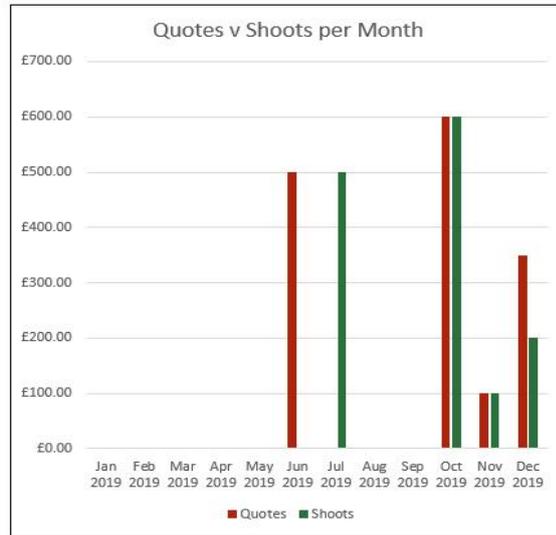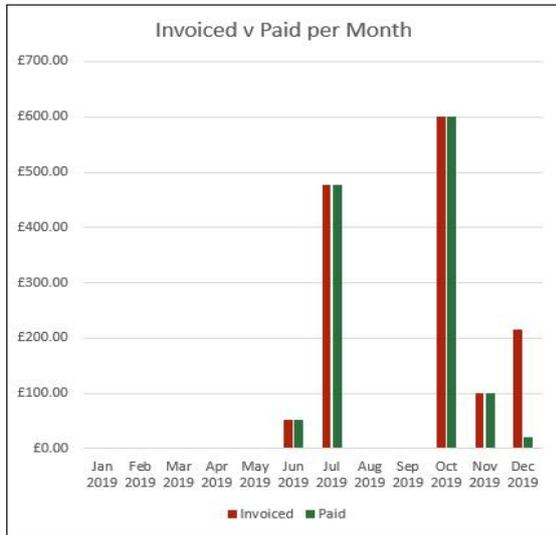
It would be a waste to have all this raw data and not put it to good use. We have included a report tab, where it uses the data to show you how much you've invoiced and been paid each month. Not only that but it also shows quotes v shoots (as a value) per month. Ideal if you want to see where your busy periods have been, handy for spotting seasonal trends. The report tab also shows you where your jobs are coming from, so you can make an informed decision as to which marketing efforts to drop and which to keep.

Job Lists

Select List to View
Complete

Page Number
1
of 1

No	Job No	Service	Service	Job Date	Job End Date	Project Details	Price	Quote Date
1	000001	Your Client	Headshots	Mon, 29/07/2019	Fri, 02/08/2019	Take headshots of Your Client's staff, and supply two options for each staff.	£500.00	01/06/2019
2	000002	The Other Business	Product Shoot	Tue, 15/10/2019	Thu, 17/10/2019	Take shots of all of your products, and provide an image for each product.	£600.00	01/10/2019
3	000003	Another Client	Family Shoot	Thu, 07/11/2019		Take shots of your family in the park, and provide some pictures to choose from.	£100.00	04/11/2019

Job Calendar

Your Business

Input any day in Active Week to over-ride

A	Accepted
C	Complete
P	Possible

Monday 16 Dec 2019	Tuesday 17 Dec 2019	Wednesday 18 Dec 2019	Thursday 19 Dec 2019	Friday 20 Dec 2019	Saturday 21 Dec 2019	Sunday 22 Dec 2019
1		C 000004				
2						
3						
4						
5						

There are two other automated tabs on the spreadsheet. One which is simply a 3 week calendar (you choose which 3 weeks), which shows all the planned, completed, and possible jobs for the period.

The other tab shows a list of all the jobs that fall into a certain category. So for example, if you want to see all the jobs where the invoice is outstanding, simply select that option.

So there you have it, an overview of this unique product. We can't show you everything in this brochure, so please use the link below to the demo video, should you wish to see exactly how this product works.

All the other links you may need for more information, or to purchase this product, are below.
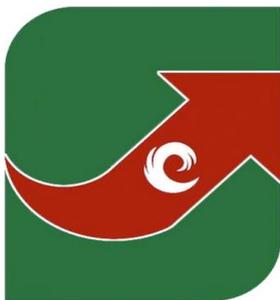
In order to purchase this product, download a free trial, or watch the demo video, please click the image to the left.

This product is sold from the UK, and will be invoiced as GBP. The fee is a once off fee, and there is no monthly charge. There will be an entirely optional annual charge, should you want to receive future upgrades.

£280

This product is created by:

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