

T A S K F L O W

10 Copy-Paste Templates

The quote reply, the payment chase, and the weekly reset —
the three pages TaskFlow owners reach for most. Free.

Free starter pack

10 Copy-Paste Templates: The Quote Reply, the Payment Chase, the Weekly Reset

These are finished, ready-to-send templates — not AI prompts. Copy one, fill in the [BRACKETED PLACEHOLDERS], and send. No AI tool needed. Save this file, star it, and come back to it whenever admin piles up.

The quote reply

Template 1: First reply to a new enquiry

Use within a few hours of getting a new enquiry — speed wins jobs.

Hi [NAME], thanks for getting in touch! Yes, we do [SERVICE] across [AREA].

To give you an accurate quote, I'll just need a few quick details — I've listed them below. Fire them back whenever suits and I'll get a price to you within [1 business day / 24 hours].

Thanks, [YOUR NAME] [BUSINESS NAME] · [PHONE]

Template 2: Qualifying questions before quoting

Use when you need the details that separate a real quote from a guess.

Hi [NAME], quick questions so I can price this properly:

1. What's the address of the job site? 2. [PLUMBER: Is it an emergency (no water / burst pipe) or can it wait a few days?] [ELECTRICIAN: Is there power to the switchboard right now, or has it tripped?] [CLEANER: How many bedrooms/bathrooms, and is it furnished or empty?] [LANDSCAPER: Roughly how big is the area, and is there easy access for a trailer?] 3. Is there a date you're hoping to have it done by? 4. Have you had a quote from anyone else, or am I your first call?

Once I have this I'll send you a firm price by [DAY/TIME]. Cheers, [YOUR NAME]

Template 3: The quote cover message

Send with your written quote or estimate. It answers the price objection before it lands.

Hi [NAME], your quote is attached — total is \$[AMOUNT] including GST.

That covers [SUMMARISE SCOPE, e.g. "supply and install the new hot water unit, including removal of the old one"]. The only thing it doesn't cover is [ANY EXCLUSIONS, e.g. "any plumbing work inside the walls — we'll flag that before we start if we find it"].

I'm holding this price for 14 days. If you'd like to go ahead, just reply "yes" and I'll lock in [PROPOSED DATE / "the earliest slot, which is next Tuesday"].

Happy to answer any questions — give me a buzz on [PHONE]. Cheers, [YOUR NAME]

The payment chase

Template 4: Gentle nudge (a few days after the invoice)

Use 3-5 days after sending the invoice, while it's still "just a reminder".

Hi [NAME], just a friendly reminder that invoice [INV-123] for \$[AMOUNT] was due on [DATE]. No stress if it's slipped your mind — you can pay by [BANK TRANSFER to BSB XXX-XXX / the link on the invoice].

Give me a shout if there's an issue. Cheers, [YOUR NAME]

Template 5: Firmer reminder (14 days overdue)

Use when the invoice is two weeks past due. Polite, but make it clear you're tracking it.

Hi [NAME], I'm following up on invoice [INV-123] for \$[AMOUNT], which was due on [DATE] — it's now 14 days overdue.

If payment's already on its way, thanks — please ignore this. Otherwise, could you please arrange payment by [DATE, 3 days out] or let me know when to expect it?

I can also set up [a payment plan / weekly instalments] if cash flow is tight — just ask. [YOUR NAME]

Template 6: Final notice before late fees or action

Use at 30 days overdue. This is the last message before you escalate.

Hi [NAME], this is a final notice for invoice [INV-123] for \$[AMOUNT], now [30] days overdue.

If payment (or a payment plan) isn't arranged by [DATE, 7 days out], I'll need to [apply the 10% late fee noted on the invoice / hand this to [DEBT COLLECTION SERVICE] / pause any further work], which I'd rather not do.

Please get in touch today so we can sort this out. [YOUR NAME] · [PHONE]

Template 7: Thank-you after payment, asking for a review

Send within a day of the money landing. Strike while they're happy.

Hi [NAME], payment received — thanks very much! Really enjoyed [doing the job / working with you on the project].

If you were happy with the work, a quick Google review would mean the world to a one-person business like mine — it takes about a minute: [REVIEW LINK].

And if you ever need [SERVICE] again, you know where to find me. Cheers, [YOUR NAME]

The weekly reset

Template 8: Friday 10-minute review checklist

Run through this every Friday arvo before you knock off.

Friday reset — 10 minutes

- [] Check bank: who paid this week? Who still owes me? - [] Follow up anyone 7+ days overdue (use the payment chase above). - [] Look at next week's calendar — any gaps to fill? Any jobs to confirm? - [] Reply to any unanswered enquiries or texts from this week. - [] File this week's receipts (photo them into [YOUR FOLDER / Dext / Hubdoc]). - [] Write down your biggest win this week. Seriously — do it.

Done. Have a weekend. [YOUR NAME]

Template 9: Monday morning plan

Fill this in Monday morning with a coffee, before you touch tools or emails.

Monday plan — [DATE]

This week's money goal: \$[AMOUNT] **Must-do (3 max):** 1. [e.g. Finish the Smith St job and send the invoice] 2. [e.g. Quote the two enquiries from the weekend] 3. [e.g. Chase the overdue invoice from [CLIENT]] **Jobs booked:** [list jobs + days] **Gaps to fill:** [e.g. Thursday free — need one job] **One thing I'm not doing this week:** [e.g. checking email after 6pm]

— [YOUR NAME]

Template 10: The "one revenue move" picker

Use when the week's looking thin. Pick ONE and do it today.

This week's one revenue move — pick one:

- [] **Follow up old quotes:** Text 3 people who never replied to a quote. ("Hi [NAME], just checking — did you end up going ahead with [the job]? Happy to sharpen the quote if the price was the issue.") - [] **Ask for referrals:** Text 3 happy clients. ("Hi [NAME], if you know anyone who needs [SERVICE], I'd love an intro — happy to look after them.") - [] **Post one job photo:** One finished job, one sentence, on [Google Business / Instagram / Facebook]. ("Before and after in [SUBURB] this week — [brief description].") - [] **Chase one debt:** The oldest unpaid invoice. One firm call or Template 5 above. - [] **Quote the pile:** Get every waiting enquiry a price today.

Pick one. Do it before lunch. Tick it off. — [YOUR NAME]

These templates are a small slice of the TaskFlow AI Kit — a 120+ prompt toolkit that helps Australian sole traders quote faster, get paid sooner, and stay organised without the admin headache. Keep these; they'll save you hours. And if you ever want the full system behind them, you know where to find it.