

Getting Started with Compass Wave

Now that your Compass Wave account is activated, you may be asking yourself, “How do I get started?” This guide will help you set up your estimate tool and establish your account settings. Once your account and estimate tool settings are established, you will want to learn about placing the estimate tool on your website (See our Guide to Placing Our Estimate Tool on Your Website).

How you set up your estimate tool will determine what your tool looks like to your prospective customers and it will also establish the questions that you ask and the information you gather. Most importantly, your inputs will directly impact the estimate that your prospective customers receive.

Compass Wave establishes default settings for the estimate tool appearance, customer questions and cost drivers. It is important that you review these defaults and update them to accommodate the needs of your company.

Other Compass Wave Guides

- Learn how to place our estimate tool on your website with our [Guide to Placing Our Estimate Tool on Your Website](#).
- For a detailed guide to our estimate calculations and cost drivers see our [Guide to Cost Drivers and Calculations](#)

Getting In and Getting Around

Once you have activated your account you can go to compasswave.com and login in the upper right hand corner of the website with your email and password.

When you first log in, you are taken to the Compass Wave Dashboard. This dashboard displays the ten most recent estimates that have been generated through your estimate tool.

The Sales section is a list of all prospects that have utilized your estimate tool. You can click on any of these prospects to see more detailed information. You can even view the estimate that was sent to the prospect.

The Tools section is where you go to customize the appearance, customer questions and cost drivers for your estimate tool.

Forgot your password?

- Click “Forgot your password?” directly under the password box.
- Still having trouble?
Visit our customer support online at www.compasswave.com/customer-service/

The Account section contains the Company Management, License Management, User Management and Billing sections. Company management is where you can update the contact information and location of your company. If you have not already done so, please update your company information. License Management contains details about your license for your records. The User Management section is where you can update your contact information and add new users to your account. Finally, the Billing section will contain information about your Compass Wave billing history.

Setting up your estimate tool

Once you are logged in and know your way around, you will need to establish the appearance, customer questions and cost drivers for your estimate tool in the Tools section. These factors will determine how your estimate tool looks, the information you collect from your prospects and how the estimates you provide are calculated.

It is important to note that once you establish your appearance, customer questions and cost driver, it is not necessary to revisit them. You are free to run your business while the estimate tool does the work for you. Of course, you have the option to update the settings as often as you want.

Appearance

Compass Wave allows you to establish the format and appearance of your estimation tool. You can select your preferences for the following features by going to Tools and Appearance:

- Size
- Border
- Buttons
- Banner
- Text
- Background
- Banner Graphic
- Accessibility

Customer Questions

Compass Wave allows you to establish the information that you collect from your prospective customers. This is accomplished by choosing which questions you ask and how you ask them. Compass Wave has established the defaults for these questions so it is important that you review and update the customer questions to fit your needs.

Compass Wave allows you to ask questions about pets, occupants, entertaining, smoking, furniture, clutter, kitchen use, additional services and frequency of service. You can also ask about access to the area being cleaned and if they have a discount code.

As displayed to the right, you have the option to ask your prospects several questions to gather information about pets.

You can choose which of the three questions you would like to ask. Also, you could choose not to ask them about pets at all. If you choose not to ask the question, then this information will not contribute to the cost that is being estimated.

After you make any changes to a customer question, it is important that you click the “Save Changes” button. Also, you will need to make sure that the corresponding time and cost drivers are established for any questions that you have recently changed or added.

Compass Wave Calculation Guide

- For a full explanation of how Compass Wave calculates estimates go to our [Guide to Cost Drivers and Calculations](#)

Time/Cost Drivers

After you established your customer questions, you must now establish the corresponding time and cost drivers. The time and cost drivers turn the information collected from your prospects into an instant estimate.

Cleaning Times

In the Cleaning Times section, you must establish your estimate for how many minutes it will take to clean each type of room as well as how other factors will affect those estimates.

For instance, you may estimate that an average bedroom takes ten minutes to clean. If a prospect provides information that they have two dogs, they are a smoker, the room has a lot of furniture and the room is cluttered then the room will take longer to clean. You have the opportunity to establish mark-ups or mark-downs for certain information that the prospect provides.

If you have asked prospects if they have pets and they answer yes, you can increase the estimated cleaning time by a percentage that you establish. In the example above, if you choose to mark up by 20% for pets, a bedroom that typically takes ten minutes to clean, will now be estimated to take 12 minutes (10 minutes + 20% mark-up = 12 minutes).

In this section you establish mark ups or mark downs for pets, occupants, kitchen use, additional services, entertaining, smoking, amount of furniture, amount of clutter, access and frequency. You can also establish the range that you would like to have applied to your estimates. If you enter 0% for the low range and 10% for the high range and an estimate is calculated to be \$100, the customer would see that their estimate is between \$100 to \$110.

All estimate times and mark-ups that you establish are applied to the information that the prospects have provided and added up to determine the cleaning time.

Cost Drivers

In the Cost Drivers section, you must establish several categories that affect costs: payroll costs, overhead costs, profit margins/markup, discount and taxes.

Payroll costs factor in the rate employees are paid, as well as payroll taxes and insurance that a company must pay.

Compass Wave allows you to calculate your total overhead cost and then divide by your estimated jobs per year to determine your overhead cost per job.

Next, you establish your desired profit margin.

You also have the option to establish discount codes and percentages to discount an estimate.

Finally, you establish the tax rate for your services.

Remember, you can see a more detailed overview of how Compass Wave calculates estimates in our [Guide to Cost Drivers and Calculations](#)

Testing Your Estimate Tool

Once you have established the appearance, customer questions and cost drivers for your estimate tool, it is important to test it out to see how well the automatic estimates align with the cleaning estimates that you would provide a prospect without our estimate tool.

If you have already set up the estimate tool on your website or your subdomain, you can test from either of those locations. Also, you can test by going to the Tools, and then appearance section of our website.

Are your test estimates too low? Perhaps you need to increase your minutes for certain rooms. Too high? Try decreasing some of your mark-ups.

Placing the Estimate Tool on Your Website or Subdomain

Now that you have tested your tool, you are ready to make it available for your prospective customers to use. Please see our [Guide to Placing Our Estimate Tool on Your Website](#).