

# OurTradie

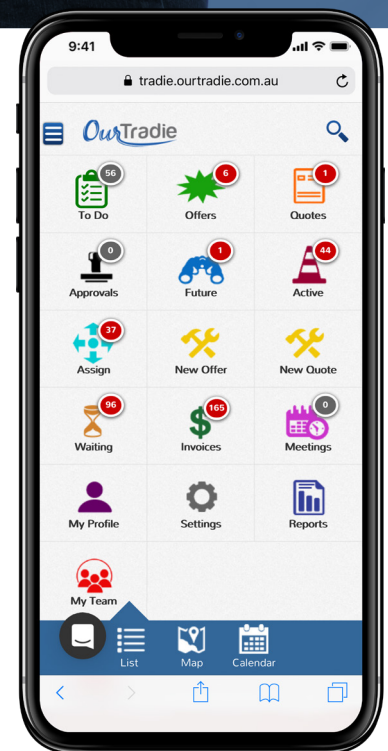
## Work Smarter, Not Harder

35% of all properties in Australia are rentals and the vast majority of these are managed by real estate agencies. Tap into this lucrative job pool today!

OurTradie enables you to work more closely with real estate businesses than ever before. Whether it's maintenance jobs, lawn mowing, plumbing or major works, OurTradie connects you with property managers and agencies in your area.

OurTradie is directly connected with the software used inside real estate offices, enabling you to see and manage all your jobs at a glance. Property managers and general customers are automatically updated as you quote, invoice or update the status of jobs. We even tell you as soon as you're paid.

You can create, send and manage invoices through the OurTradie system. You'll receive requests to quote on jobs directly from landlords and property managers. OurTradie makes managing your jobs simple from start to finish.



## All Tradies - Great and Small

From sole tradies to large companies, OurTradie suits the way you work. You can invoice the way you like, from general price guides through to detailed costs of material and labour.

## Connectivity

OurTradie is an online cloud-based platform that you can access on your mobile, tablet or computer. You can work on the road or from the office, no matter where you are.

Your digital invoices are instantly forwarded to the landlord, meaning less mistakes, clearer communication, faster approvals, and faster payments.

## Your Online Brain

Instead of remembering all the fine details, OurTradie does it for you. Your tradie portal saves all the communications with customers and reminds you when it's time to start a job or submit an invoice.

At a glance, you can see the status of all your work, even if you manage a large team. You can easily update jobs to let your customers know you are waiting on parts or needing access, saving you precious time.

# Features at a Glance



Turn quotes to invoices in one click



Send invoices to customers instantly



Manage your team and stay in charge of quote and invoice approvals



Replace hand-written job sheets



Add images and video to quotes



Use OurTradie anywhere & update jobs offline



Built-in email and SMS messaging



Real-time calendar of all your work



Set meetings with customers



Map out & understand your cashflow



See who you are waiting on



Quote alternatives and optional extras

## All the Benefits



### Job sheets

When you use OurTradie job sheets are no longer needed because all the details of your work, including customer information, are on your phone in the app.



### Scheduling

Job schedules are produced automatically and can be viewed in a handy calendar to make sure you arrive on time every time.



### Communications

You'll be notified by email and SMS each time you have been assigned a job or when there's a new job to quote on. You can keep in touch as the job progresses, all through the app.



### Invoices

Say goodbye to handwritten invoices and having to rewrite your time and materials again after you quote. The time and materials you use in a job are automatically prepared as an invoice when you are ready to bill your customer.



### Payments

All payments are done through the system, directly into your nominated bank account.



### Budgeting

The OurTradie budget tool lets you see the value of work coming up. You can review the contribution of individual staff so you can manage yourself and your staff more effectively.

## Fees

Fees vary depending on the agency that provides the job to you. There is a base OurTradie charge of 2% per approved invoice capped at \$20.00 (GST exclusive). You can include this in the total cost of your quotations and invoices if you like. Fees are charged by credit card on the first day of the month for the invoices you have received payment for in the previous month.

**There are no other fees or charges to use the platform.**



# How to sign up

Signing up is easy. You can do it all online within 10 minutes.

Other information you will need when signing up is included on the back page of this brochure.

1. Go to the OurTradie website at [www.ourtradie.com.au/signup](http://www.ourtradie.com.au/signup)
2. Select the 'Tradie' sign up option and fill out your details.
3. You'll need your company name, email, insurance and certificate information, bank account details, company logo and other general information to sign up.

## OurTradie Settings Explained

Setting	Description
Do you work outside your serviced postcodes for existing customers?	Some customers are worth working for even if it is outside your standard areas.
Financial reporting method	Smaller businesses tend to report their income position which is called Cash reporting. Larger businesses often use Accrual reporting to account for the value of all invoices, not just payments.
Invoice number start	Use this field if you want OurTradie to automatically choose the next invoice number in a range to suit your internal numbering system.
Your business licenses	Your business licenses, for example, your builders license which will be included in your invoices.
Your qualifications	Your relevant business qualifications.
Your insurance details	Details of your insurances. This information is shown to agencies so that they are aware you are compliant for works.
Job title preference (displays as the title for jobs in OurTradie)	Depending on the type of work you do, you might want to have other information displayed in the Job Title field than the Job Title. For instance, if all your jobs are "Mow Lawn", the address is probably more important.
Standard price markup	Your materials markup rate. You can override your price markup for any item when quoting and invoicing.
Standard call out fee	Set your standard business hours call out fees if you use them.
Out of hours call out fee	Set your out of hours call out fees if you use them.
Standard working hours	Set your business hours and after hours. If you use Call out fees, they will be added by default to your invoices.
Start time	The time you generally start your day. This helps us schedule your future jobs.
End time	The time you generally end your day. This helps us schedule your future jobs.
Average job duration (hours)	When you are setting times for jobs, we use this amount of time in the calendar to make it a bit easier. You can easily adjust the time for a job in the calendar.



## OurTradie Settings Explained cont.

Setting	Description
Forward booking period (days)	If you are generally booked into the future, list the number of days. We will help by placing your jobs this many days ahead in the calendar but you can easily adjust this in the calendar.
Payment	The payment details where invoices will be deposited into.
Your logo	This is added to all you invoices and quotes etc.
Standard contract	Add your standard contract if you have one. This will be included in all your invoices.
Optional invoice text	Add text you optionally add to invoices. For example, plumbers need to add certain text to invoices depending on the works they have completed.
Shorthand invoice item names	The shorthand name of the invoice text you can save and re-use when needed in your invoices.
Saved invoice text	The actual invoice text you can save and re-use when needed in your invoices.
Saved work items	You can save details of work items including pricing for re-use when you quote and invoice. We strongly recommend you consider using this feature. It saves a great deal of time and effort.
Account type	To integrate with your MYOB or Xero accounting system, choose your accounting package.
Sales account number	This is the Sales account number for invoices generated from OurTradie in your accounting package.
Export paid invoices as	Set whether you export your invoices as paid or unpaid.
Customer	Choose your agencies or customers in OurTradie. Add your MYOB or Xero customer name for them for each customer. Please note: Only customers who have approved an invoice will be available in the Customers dropdown list.
Account name	This is how you name your customers in MYOB and Xero.

## OurTradie Support

Help is always available!

OurTradie has a wide range of online videos and articles to help you learn how to use the platform at

[knowledgebase.ourproperty.com.au](https://knowledgebase.ourproperty.com.au)

If you have any questions during this process, please contact the Support team on:



[support@ourtradie.com.au](mailto:support@ourtradie.com.au)