

THE PRESSURE

The work gets done. But the admin keeps following you home.

Quotes. Paperwork. Site changes. Invoices. Follow-up.



If we sorted one thing out first, what would make the biggest difference?

Quotes and winning work

“Quotes are sitting there and I don’t get back fast enough.”

Invoices and getting paid

“I don’t know what’s invoiced or overdue.”

Compliance paperwork

“Every builder wants different paperwork.”

Too much admin generally

“Everything is in my head, phone or email.”

Site information and variations

“I agree to extras and forget to charge them.”

SOME STRUCTURE

Get paid. Keep jobs moving. Get your evenings back.

Less chasing. Fewer hold-ups. A clearer head.



Builder message

Can you price this?

Site photos

Extra wall + access

Paperwork

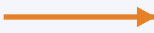
SWMS before Monday

Email

Invoice still unpaid

Crew message

Where are we tomorrow?



Trade Office

Capture - organise - follow through

Get paid for the work

Fewer hold-ups

Fewer compliance surprises

Know what's next

Get your evenings back

Work keeps moving. Money gets followed up. Less comes home with you.

OUR METHOD

Win the work. Deliver it. Get paid.

One job moves through the business, with its records and next steps together.



Enquiry

Can you price this?



WIN THE WORK

Scope → price →
accepted quote



DELIVER THE WORK

Site records →
compliance → changes



GET PAID

Invoice → follow-up →
payment



Job in order

Records + next actions
clear

One job. Its records and next actions stay connected.

MANAGING JOBS - LEADS & OPPORTUNITIES

Don't let good work disappear.

WIN THE WORK



Builder calls while you're onsite

WHAT CAN HAPPEN

A job starts next month, but the details stay in your phone and the follow-up gets forgotten.

WITH TRADE OFFICE

Save the builder, rough scope, timing and next follow-up.

The opportunity stays visible.

A tradie refers a job you can't take yet

WHAT CAN HAPPEN

You're booked out now. The client and the referral can be forgotten by the time you have room.

WITH TRADE OFFICE

Save the client, referrer and timing, with a date to get back in touch.

Today's referral can become future work.

The quote went out last week

WHAT CAN HAPPEN

Nobody has checked whether the client received it or needs anything else.

WITH TRADE OFFICE

Keep the quote status, follow-up date and next action visible.

Good quotes keep moving.

What this Means | Leads captured - Referrals remembered - Quotes followed up - More chances to win work

MANAGING JOBS - QUOTES & SCOPE

Quote the right job — not half the job.

WIN THE WORK

“Just price what you saw onsite.”

WHAT CAN HAPPEN

Preparation, access or waste removal gets missed and eats into the margin.

WITH TRADE OFFICE

Turn site notes, photos and measurements into clear inclusions, exclusions and allowances.

Price with a clearer scope.

The supplier price hasn’t arrived

WHAT CAN HAPPEN

Guessing the cost can leave you carrying the difference.

WITH TRADE OFFICE

Flag the missing price and follow up before the quote goes out.

Protect the margin.

The client wants a revised quote

WHAT CAN HAPPEN

It becomes unclear which amount and scope were accepted.

WITH TRADE OFFICE

Keep the changes, versions and accepted quote together.

Know what was agreed.

What this Means | Clearer scope - Better costing - Faster quotes - Protect your margin

MANAGING JOBS - CONTRACT MANAGEMENT

Know what you agreed before the job starts.

DELIVER THE WORK



The builder sends a subcontract

WHAT CAN HAPPEN

Payment terms, retention or notice requirements can be missed.

WITH TRADE OFFICE

Record the practical terms and dates against the job.

Fewer surprises after starting.

You get a verbal “go ahead”

WHAT CAN HAPPEN

Later, nobody can find who approved the work or which quote they accepted.

WITH TRADE OFFICE

Save the approval, date and quote version with supporting correspondence.

A clearer agreement record.

Accounts needs a PO number

WHAT CAN HAPPEN

The invoice can be sent back while you chase the reference.

WITH TRADE OFFICE

Capture the PO requirement when setting up the job.

Get the invoice details ready early.

What this Means | Clear agreement - Correct job setup - Fewer surprises - Stronger payment records

MANAGING JOBS - SITE MANAGEMENT

Keep a proper record of what happened onsite.

DELIVER THE WORK

The builder asks for extra work

WHAT CAN HAPPEN

The instruction is forgotten and the extra work is hard to explain later.

WITH TRADE OFFICE

Save who asked, what changed, the date and photos.

A clearer variation record.

Blocked access costs half a day

WHAT CAN HAPPEN

Without notes or photos, the delay is hard to show.

WITH TRADE OFFICE

Record the delay, crew affected and when the builder was notified.

Evidence ready when needed.

Four blokes finish the eastern elevation

WHAT CAN HAPPEN

The progress stays in your head until claim time.

WITH TRADE OFFICE

Capture a voice note and photos as a Site Diary entry.

Less paperwork to rebuild later.

What this Means | Less to remember - Better evidence - Clearer variations - Easier claims

MANAGING JOBS - PEOPLE & SUPPLIERS

Know who is on the job and what they need.

DELIVER THE WORK



A subcontractor arrives onsite

WHAT CAN HAPPEN

Missing contact or induction details can delay the start.

WITH TRADE OFFICE

Keep their contact, agreed rate and required records linked to the job.

An easier handover.

Delivery is due tomorrow

WHAT CAN HAPPEN

The crew can lose time chasing the supplier or wrong delivery address.

WITH TRADE OFFICE

Save the order, job, delivery date and supplier contact.

Fewer delivery mix-ups.

A worker's paperwork expires

WHAT CAN HAPPEN

You discover it when the site asks for current records.

WITH TRADE OFFICE

Keep expiry dates visible and request updated documents.

Fewer last-minute hold-ups.

What this Means | Right people - Current records - Better handover - Fewer site problems

MANAGING JOBS - COMPLIANCE & SAFETY

Don't let paperwork be the reason the job stops.

DELIVER THE WORK



The builder wants SWMS before the crew starts

WHAT CAN HAPPEN

Missing SWMS or worker sign-on can hold up site access.

WITH TRADE OFFICE

Prepare the job's SWMS and track the required signatures and records.

Help the crew get ready to start.

The insurance certificate has expired

WHAT CAN HAPPEN

You discover it at induction or when documents are requested for a claim.

WITH TRADE OFFICE

Keep the expiry date visible, request an update and save the current certificate.

Fewer last-minute document chases.

The invoice needs a Subcontractor Statement

WHAT CAN HAPPEN

The submission can be held up while the required form is found and completed.

WITH TRADE OFFICE

Keep the correct statement linked to the job and invoice, ready to complete and sign.

Help avoid paperwork delaying payment.

What this Means | Documents ready - Fewer hold-ups - Better records - Lower compliance risk

MANAGING JOBS - INVOICE MANAGEMENT

When the work is ready to claim, get the invoice moving.

GET PAID



The stage finished last Friday

WHAT CAN HAPPEN

Raising the invoice next Thursday adds almost a week before payment can even begin.

WITH TRADE OFFICE

Connect completed milestones to the next claim or invoice action.

Start the payment clock sooner.

An approved \$1,850 variation is unclaimed

WHAT CAN HAPPEN

The extra work is done, but the amount has not reached an invoice.

WITH TRADE OFFICE

Keep approved variations visible alongside the amount ready to claim.

Less extra work left unbilled.

The invoice goes to the wrong contact

WHAT CAN HAPPEN

Accounts delays processing while the invoice is redirected.

WITH TRADE OFFICE

Keep the billing entity, accounts email, PO and project reference together.

Send it with the right details.

What this Means | Invoice sooner - Claim the right amount - Attach the right records - Start the payment clock

MANAGING JOBS - PAYMENT FOLLOW-UP & DISPUTES

Know what you're owed and what needs chasing.

GET PAID



An \$18,950 invoice is 14 days overdue

WHAT CAN HAPPEN

Another week passes without a clear follow-up or payment date.

WITH TRADE OFFICE

Keep the amount, due date, accounts contact and last follow-up together.

Know what to chase next.

Accounts says: “We never received it.”

WHAT CAN HAPPEN

You lose more time searching emails and resending documents.

WITH TRADE OFFICE

Keep the sent date, recipient and invoice copy with the payment record.

Resend with the record ready.

The builder disputes the amount

WHAT CAN HAPPEN

The quote, approvals and site photos are scattered when you need to explain the claim.

WITH TRADE OFFICE

Bring together the agreement, variations, site records, invoice and follow-ups in a Debt Handover Pack.

Be ready to hand the evidence to an adviser.

What this Means | Know what's overdue - Chase the right person - Keep the trail - Be ready to escalate

MANAGING JOBS - BOOKKEEPING FOR ACCOUNTING

Stop rebuilding the paperwork at BAS or tax time.

GET PAID



The receipt is somewhere in your phone

WHAT CAN HAPPEN

The cost can be missed or you spend time hunting for it later.

WITH TRADE OFFICE

Capture the receipt, supplier, date, amount and job together.

Less paperwork to chase.

A supplier invoice arrives by email

WHAT CAN HAPPEN

The bill gets separated from the job and payment date.

WITH TRADE OFFICE

Link it to the supplier, job, amount and due date.

Keep job costs visible.

The accountant asks about a transaction

WHAT CAN HAPPEN

You need to reconstruct what was bought and why.

WITH TRADE OFFICE

Keep the receipt or invoice attached to the supporting record.

An easier accountant handover.

What this Means | Receipts captured - Costs linked to jobs - Cleaner records - Easier accountant handover

SEE HOW IT WORKS

Let's take a look.

Choose the part of the job that matters to your business.



WIN THE WORK

Costing & Quote Builder

Enquiries & follow-up

DELIVER THE WORK

Compliance Pack

Site Updates & Variations

GET PAID

Invoice Builder

Payments & follow-up

Click a demo to open the existing site. Online access is required; demo access permissions still apply.

HOW WE WORK

Start moving now. Keep making it better.

Address the priority. Keep delivering. Improve as we go.

MONTH 1

Start with what needs attention.

Move the first request, paperwork item or payment follow-up. Put the basics in place.

MONTH 2

Keep it moving and improve.

Support the day-to-day work and follow up what's outstanding.

MONTH 3

Build consistency and review.

Refine the process, review progress and agree what needs ongoing support.

Review the next 12 months together: what you manage, what we support and what improves next.

SCOPE & FEE

Clear scope. Agreed support. No guesswork.

Setup. Support. Any agreed additions.

Setup

The process, records and documents we agree to put in place.

Support

The agreed work we help manage with you.

Any additions

Extra work discussed and agreed before proceeding.

GETTING STARTED

You don't need everything at once.

Solve one problem. Work on one project. Get the office working.

Solve One Problem

Sort out a specific issue that's holding you up.

Work on One Project

Put support around the work and admin on a particular job.

Get the Office Working

Bring more order to the office side of your business.

Let's get started.

A clear starting point. Practical support. Work moving forward.