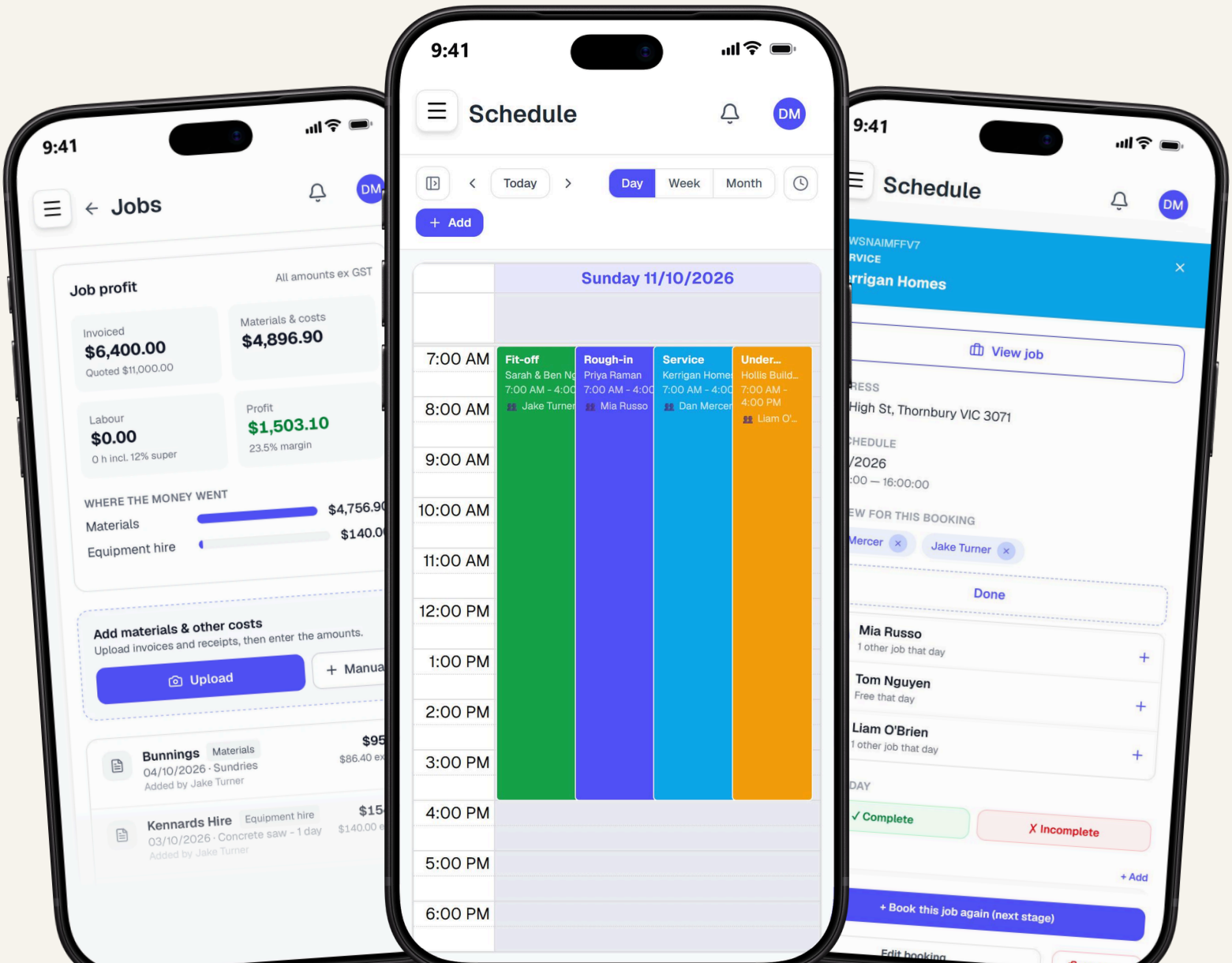
TradePal

The TradePal *guide*

Set up your business, win the work, run the jobs and get paid. How every part fits together, with simple steps and real screens.



How TradePal *works*

Every job follows the same path. Get each step right and the paperwork looks after itself.

1 **Set up**
Your business details, stages, pay rules, clients and team. Switching? Bring your data across. p.5

2 **Win the work**
Quote on site and your client accepts online. Or turn a work order into a job in one go. p.13

3 **The job**
Made for you from the accepted quote, with the client, address, site contacts and quoted work. p.16

4 **Book the crew**
Tap the job (or drag it onto the calendar on a computer), pick the stage and who's going. p.18

5 **Do the work**
Your crew clock on, work from My Tasks, sign the safety paperwork and snap receipts. p.19

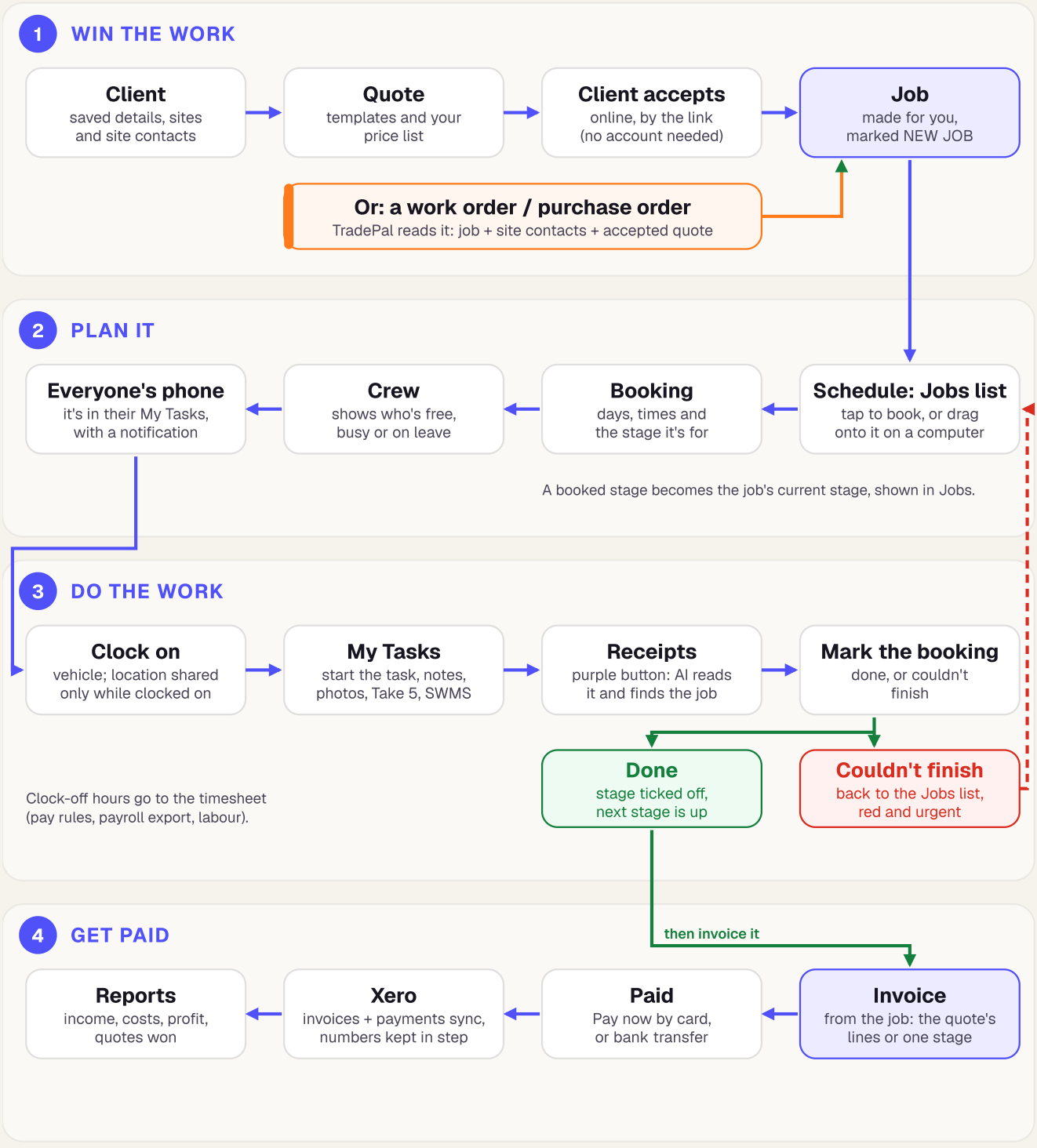
6 **Invoice and get paid**
Invoice from the job, take card payments, and see the profit on every job. p.25

Who does what

Owner	Everything: settings, prices, staff, invoices, money and your subscription.
Co-owner	Same access as the owner. Make a team member co-owner in Staff.
Supervisor	Runs the jobs and the schedule, and approves time changes. Sees money only if you switch it on.
Staff	Their own day in My Tasks: jobs, addresses, notes, clocking on, receipts and sick days. They see all jobs, or only the ones they're booked on (your choice).
Subcontractor	A staff member paid by their own invoices. They send them to you in TradePal.

How it all fits *together*

Follow the arrows: each step fills in the next, so nothing is typed twice.



BEHIND EVERY JOB: ITS PROFIT, LIVE — = profit and margin

Invoiced	- Materials & costs	- Labour	- Subbies
what you've billed	receipts, supplier invoices	hours on the job × pay + super	their invoices, once approved

What each step *does for you*

The point of each part of TradePal, and what it sets up for the next one.

Client	→	Their details, sites and site contacts fill in every quote and job for them. Pick a site and the job address is done.
Accepted quote	→	Becomes the job, and later the invoice's lines. A work order does the same in one step.
Booking with a stage	→	Makes that stage the job's current stage. When the booking is marked done, the stage ticks itself off and the next booked stage is up.
Couldn't finish	→	Puts the job back at the top of the Schedule's Jobs list in red, so it gets booked again properly.
Clock on and off	→	Builds the timesheet with your pay rules. That's payroll, and the labour cost in your reports.
Start and stop a task	→	Puts those hours on the job, so each job shows its own labour.
Receipt	→	AI reads it and puts it on the job by the address or job number on it. Anything it can't place waits in Miscellaneous expenses.
Subbie invoice	→	Once you approve it, each line counts as labour on its job. Then you pay it.
Invoice	→	Pulls from the accepted quote, a category or a stage, shows on that stage, takes card payments, and copies to Xero.
Leave and allowances	→	Sick days, leave and meal or car allowances land in the timesheet, so payroll has everything.
All of it	→	Adds up to each job's live profit, and the business totals in Reports.

THE IDEA

You only enter something once. The client typed on a quote is on the job, the booking, the invoice and in Xero. The hours your crew clock are on their timesheet and in the job's profit.

PART 1

Set up in an *afternoon*

Do these once and TradePal fills in the rest for you on every quote, job, timesheet and invoice. Tick them off as you go.

- [ ] **Get the app**
  On the App Store and Google Play. Same account as the website.
  p.6

- [ ] **Switching from another app? (optional)**
  Bring your clients, jobs, price list and quote templates across for free.
  p.7

- [ ] **Your business details**
  Logo, ABN, contact details and bank account.
  p.8

- [ ] **Your job stages**
  The steps your jobs go through, like rough-in and fit-off.
  p.9

- [ ] **Your pay rules**
  Overtime, weekend and public holiday rates, plus meal allowance and leave.
  p.9

- [ ] **Invite your team**
  One link. They join from their phone and you approve them. Set hourly, wage or subcontractor.
  p.10

- [ ] **Your clients and their sites (optional)**
  Saved details, location addresses and site contacts.
  p.11

- [ ] **Card payments and Xero (optional)**
  Let clients pay by card, and copy invoices and payments to Xero by themselves.
  p.12

BEFORE YOU START

Have these handy before you start: your logo, ABN, bank details (BSB and account number), and your team's names and email addresses.

START HERE

TradePal on your *phone*

TradePal is on the App Store and Google Play. It's the same account on your phone, tablet and computer, so start wherever suits you.

1. **Sign up on the website**
   At tradepalapp.com.au. Your free trial and subscription are looked after on the website, not in the app.

2. **Download TradePal**
   From the App Store on an iPhone, or Google Play on Android.

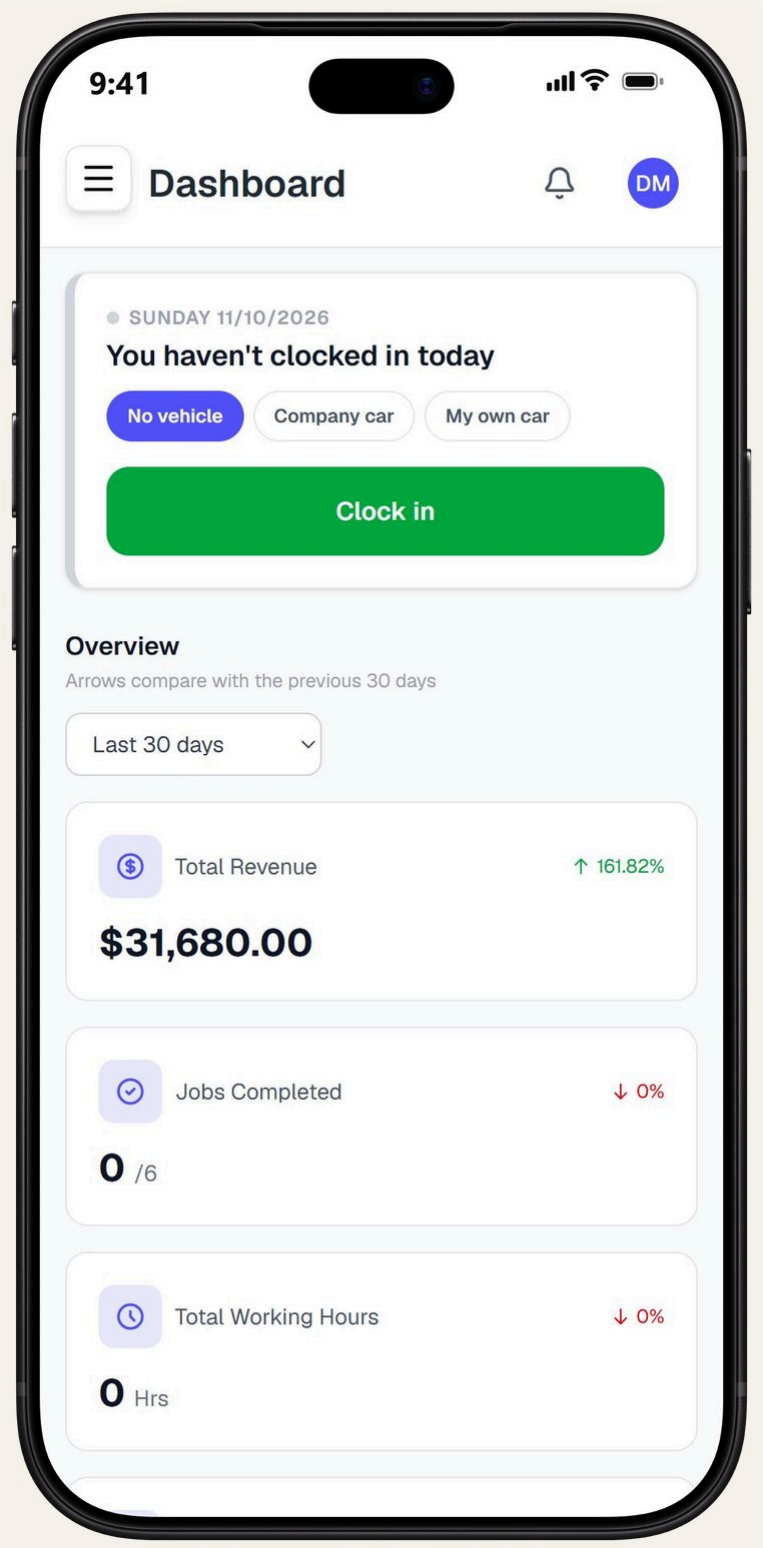
3. **Log in with the same email and password**
   Everything you've set up is already there.

4. **Allow notifications**
   So you hear about bookings, time approvals and sick days. Check it with Settings › Notifications › Send a test.

5. **Your crew do the same**
   After they join with your invite link (see p.10). Staff never pay: it's all on your subscription.

LOCK IT DOWN (OPTIONAL)

Turn on two-step login in Settings › Security. After your password, TradePal asks for a code from an authenticator app. Keep the backup codes somewhere safe.



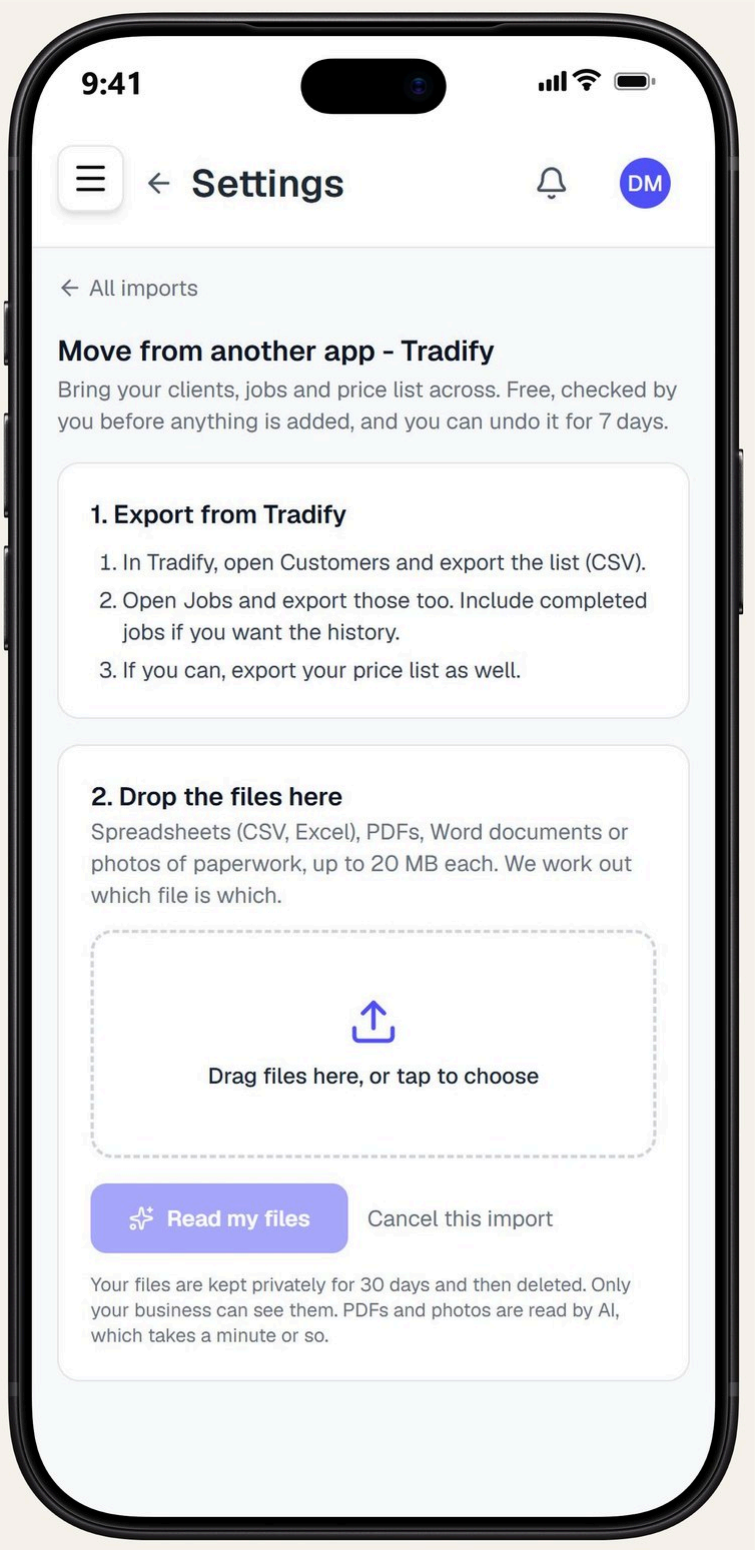
OPTIONAL · DO THIS FIRST

Switching? Bring your *data*

Coming from Tradify, Fergus, ServiceM8, simPRO, AroFlo or a spreadsheet? Bring your clients, jobs, price list and quote templates across. It's free.

Settings › Move from another app

1. **Pick your old app**
   TradePal shows you exactly what to export from it.
2. **Export from your old app**
   Usually your customer list and jobs, plus your price list and quote templates (kits) if you can.
3. **Drop the files in**
   Spreadsheets (CSV or Excel), PDFs, Word documents or even photos of paperwork. TradePal works out which file is which.
4. **Tap Read my files**
   AI reads PDFs and photos. It takes a minute or so.
5. **Check it, then add it**
   Tap Add, Merge or Skip on each row (or do a whole list at once). Duplicates are skipped for you, and View clash shows two records side by side. Template lines keep their categories. Undo it within 7 days.



FREE SWITCH-OVER

Rather we did it for you? Email support@tradepalapp.com.au and we'll move it across for free.

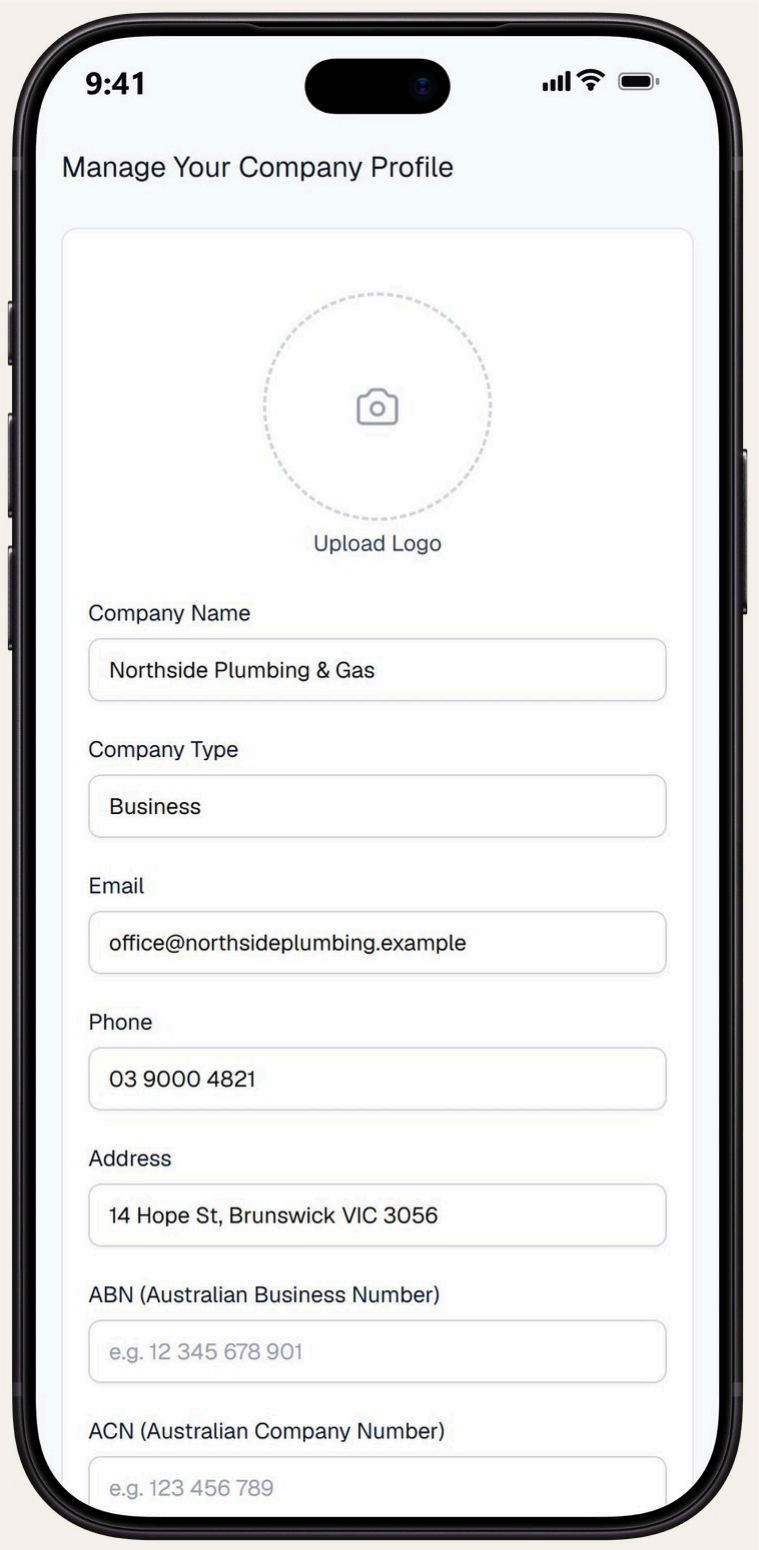
STEP 1

Your business *details*

These print on every quote and invoice, so get them right once.

Menu › Settings › Company

1. **Upload your logo**
   Tap the circle at the top. A square logo looks best.
2. **Add your business name, email, phone and address**
   Clients see these on quotes and invoices.
3. **Add your ABN (and ACN if you have one)**
4. **Add your bank details**
   Account name, BSB and account number print on invoices so clients can pay by bank transfer.
5. **Check your business timezone, then Save Changes**
   Set for you from your phone. It's used when a client accepts a quote or pays.



STEPS 2 AND 3

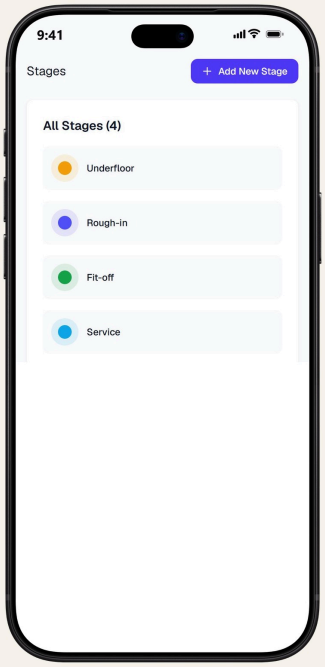
Stages and *pay rules*

Job stages

Stages are the steps a job moves through. Each booking on the Schedule is for a stage, and when the booking is done, the stage ticks itself off on the job.

Settings › Stages

1. **Tap Add New Stage**
2. **Name it and pick a colour**
   The colour shows on the calendar, so your crew can tell stages apart.
3. **Put them in the order you work**
   Use the arrows, e.g. Underfloor, Rough-in, Fit-off. Every job lists its stages in this order.



Pay rules

Timesheets use these rules, with each person's pay, to work out ordinary hours, overtime and pay.

Settings › Pay Rules

1. **Pick your pay period**
   Weekly, fortnightly or monthly, and the day it starts.
2. **Choose how overtime works**
   Per day or per week.
3. **Set the steps**
   For example: first 7.6 hours at 1×, next 2 hours at 1.5×, then 2×.
4. **Set Saturday, Sunday and public holiday rates**
5. **Meal allowance and leave (optional)**
   Switch them on here (see p.20), then tap Save pay rules.

IMPORTANT

The starting rules are a guide only. Check them against your award or agreement before you save.

STEP 4

Invite your *team*

Your crew joins with one link. No passwords to send, no forms to fill in for them.

Menu › Staff › Staff Invite Link

1. **Make a link and send it**
   Tap refresh to make your invite link, copy it and send it by text, email or your group chat. A new link stops the old one working.

2. **They tap it, then you approve them**
   They make a login on their phone, then wait in Staff under Waiting to join your team until you tap Approve. They're not billed until then.

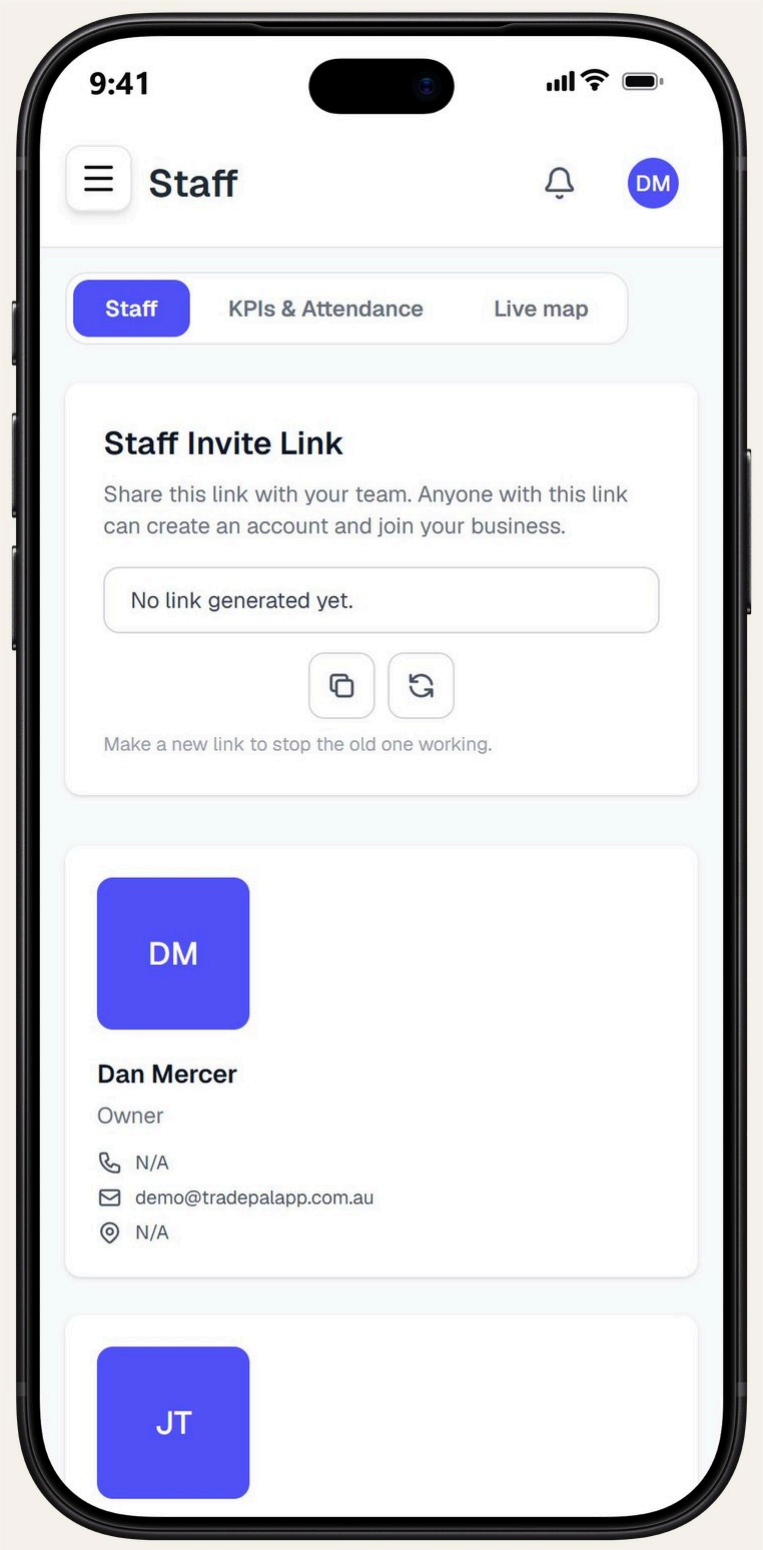
3. **Set each person up**
   Open them in Staff: role (Staff, Supervisor or co-owner), photo, and how they're paid.

4. **Hourly rate or Wage**
   Hourly: pay from the hours they clock. Wage: a set weekly wage counted at the end of each pay week.

5. **Subcontractor**
   Paid by their own invoices, not by the hour. Their dashboard shows Upload invoice instead of Clock in (see p.24).

WHO SEES WHAT

Settings › Team access: whether supervisors see money, and whether staff see all jobs or only theirs.



STEP 5 · OPTIONAL

Clients, sites and *site contacts*

Clients are saved the first time you quote or make a job for them. Add their sites and contacts once and they fill in every job after that.

Settings › Clients

1. **Tap a client**
   Their info card opens: phone, email and address with copy buttons, their sites, site contacts and every job you've done for them.
2. **Tap Edit to change anything**
   Or + New Client to add one.
3. **Add location addresses**
   Each site you work at for them, e.g. every store you maintain. Add gate codes or parking notes.
4. **Add site contacts**
   Supervisors, site managers or tenants, with their mobile.

On the job

When you make a job for that client, their sites show as one-tap addresses and their contacts as one-tap adds.

Every job can have its own site contacts too. On the job's Overview your crew can **call, text or email** them in one tap.

BUILDERS

Builders with several supervisors? Add each one to the client. Then add the right one to each job in a tap.

STEPS 6 AND 7 · OPTIONAL

Card payments and *Xero*

Get paid by card

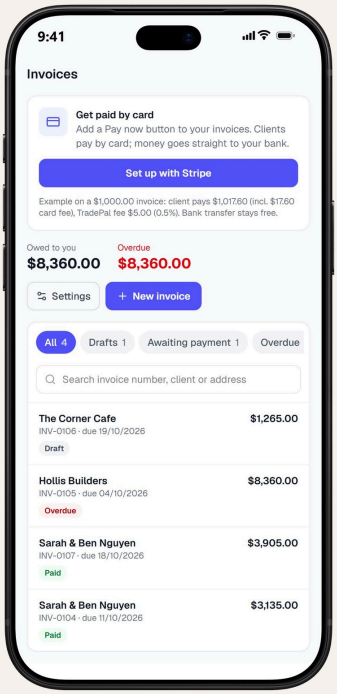
Add a Pay now button to your invoices. Money goes straight to your bank through Stripe.

Settings › Payments

1. **Tap Set up with Stripe**
2. **Follow Stripe's steps**
   Your business details and the bank account to pay into.
3. **Turn it on**
   Every invoice now has a Pay now link.

OPTIONAL

Not for you? Close the card payments box on the Invoices page. It always stays in Settings › Payments if you change your mind.



Connect Xero

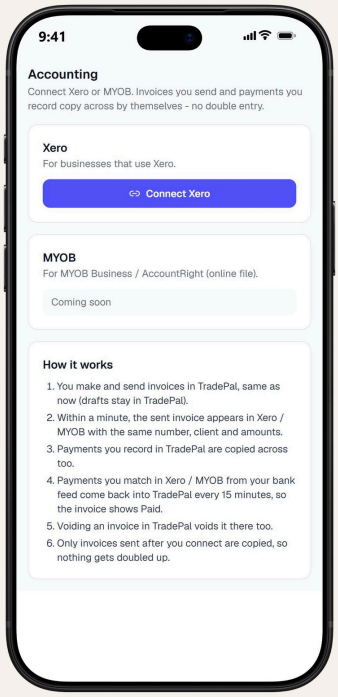
Invoices you send and payments you record copy across by themselves. No double entry.

Settings › Accounting

1. **Tap Connect Xero**
2. **Sign in to Xero and allow access**
3. **That's it**
   Sent invoices appear in Xero within a minute. Payments you match in Xero come back every 15 minutes and show as Paid.

TIP

Invoice numbers stay in step: if someone makes an invoice straight in Xero, TradePal's next number carries on after it, so the two never clash. Unlink Xero any time on the same page. MYOB is coming soon.



PART 2

Quote it on *site*

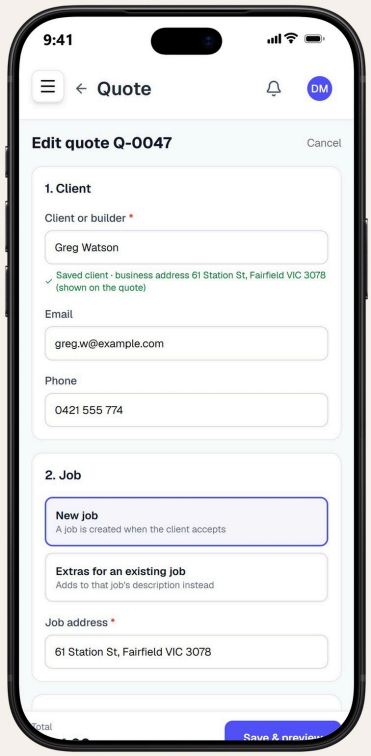
Build the quote before you leave the driveway. Your client gets a link and accepts it online.

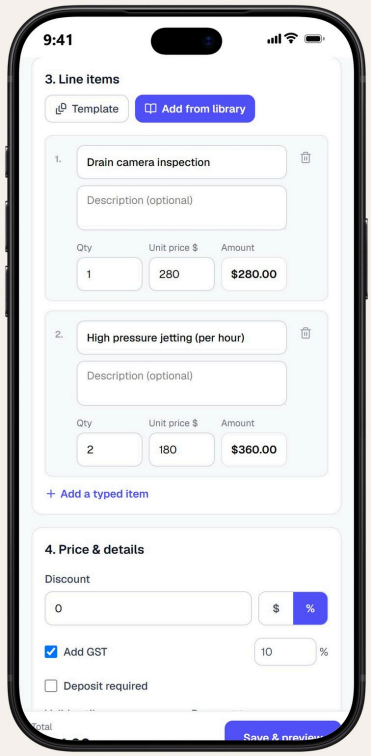
Menu › Quotes › New quote

1. **Client**
   Pick a saved client or type a new one. Their email and phone fill in.
2. **Job**
   New job, or extras for a job you're already doing. Pick the address from the suggestions.
3. **Line items**
   Add from a Template or your Line item library (priced per metre, per hour or each), or type an item.
4. **Group them (optional)**
   Tap Add a category, e.g. Underground, First fix, Fit-off. Each shows as a heading with its own subtotal, and you can bill one at a time.
5. **Price and details**
   Discount, GST (add it, already in your prices, or none), deposit, valid-until date, payment terms and notes.
6. **Tap Save & preview**
   Check it looks right.

SAVE TIME

Set up Templates (a whole job's worth of items, e.g. a full bathroom) and a Line item library (pre-priced items) once. Most quotes then take a couple of minutes. Got kits in your old app? Import them (see p.7).





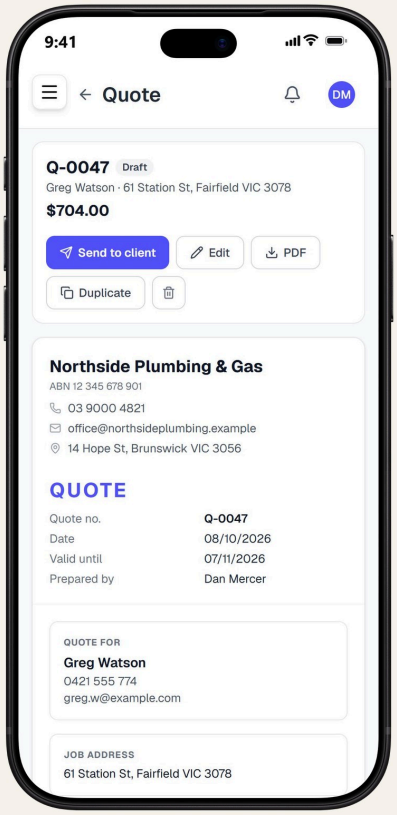
Send it, and the job *makes itself*

6 **Tap Send to client**
They get an email with a link to view the quote.

7 **Watch the status**
Draft, Viewed, then Accepted or Declined.

8 **Your client taps Accept**
They don't need an account.

9 **The job is created for you**
With the client, address and quoted work. It shows in Jobs as NEW JOB, ready to book.

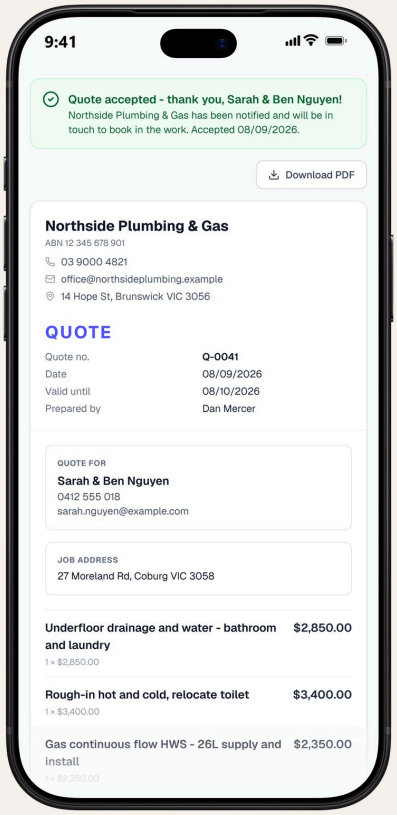


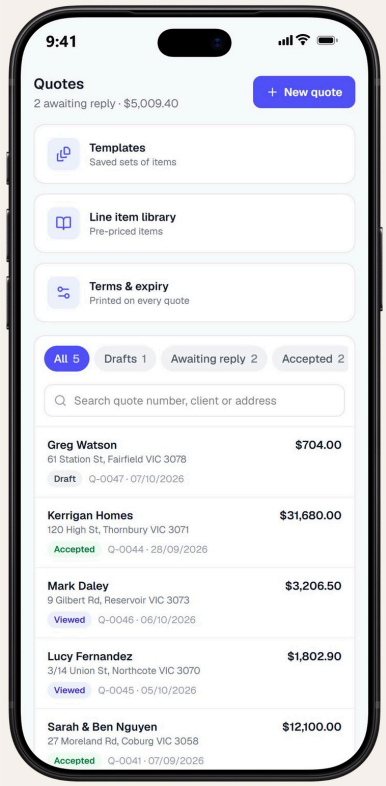
KNOW WHAT'S COMING

The top of the Quotes page totals what's awaiting a reply, sent and accepted, for this month, 90 days, the financial year or all time. The dashboard shows it too, with your win rate.

DO THIS ONCE

Set your T&Cs (typed, or a PDF attached to every quote) and your email message once, in Quotes › Terms, T&Cs & email message.





ORDERED TO DO THE WORK?

A job from a *work order*

Builders, strata and property managers send work orders and purchase orders. Don't retype them: TradePal reads them for you.

Menu › Jobs › From work order

1. **Choose the work order**
   A PDF or a photo of it.
2. **TradePal reads it**
   Under a minute: the client, site address, scope of work, due date, site contacts and any prices or approved amount.
3. **Check the details**
   Change anything that's not right. Pick a saved client if it's one you already have.
4. **Tap Make the job and quote**

What you get

The job
With the work order number and scope in the description, and the site contacts ready to call.

The work order on the job
Saved in the job's Notes, so the crew can open the original.

An accepted quote
With the order's prices. It's already approved work, so it's accepted, and the invoice pulls its lines when the job's done.

PART 3

Everything about the job, in *one place*

Open any job from Jobs. The tabs along the top hold everything your team needs.

Overview

Job title (optional), client, address, booked dates, crew and site contacts to call or text. Tap Get directions to open maps.

Bookings

Every booking: when, which stage, who was on it, their hours and the note. Book this job opens the Schedule with it picked.

Notes

Gate codes, what the client asked for, photos and files.

Plans

Upload drawings so everyone works from the latest plan (optional).

Stages

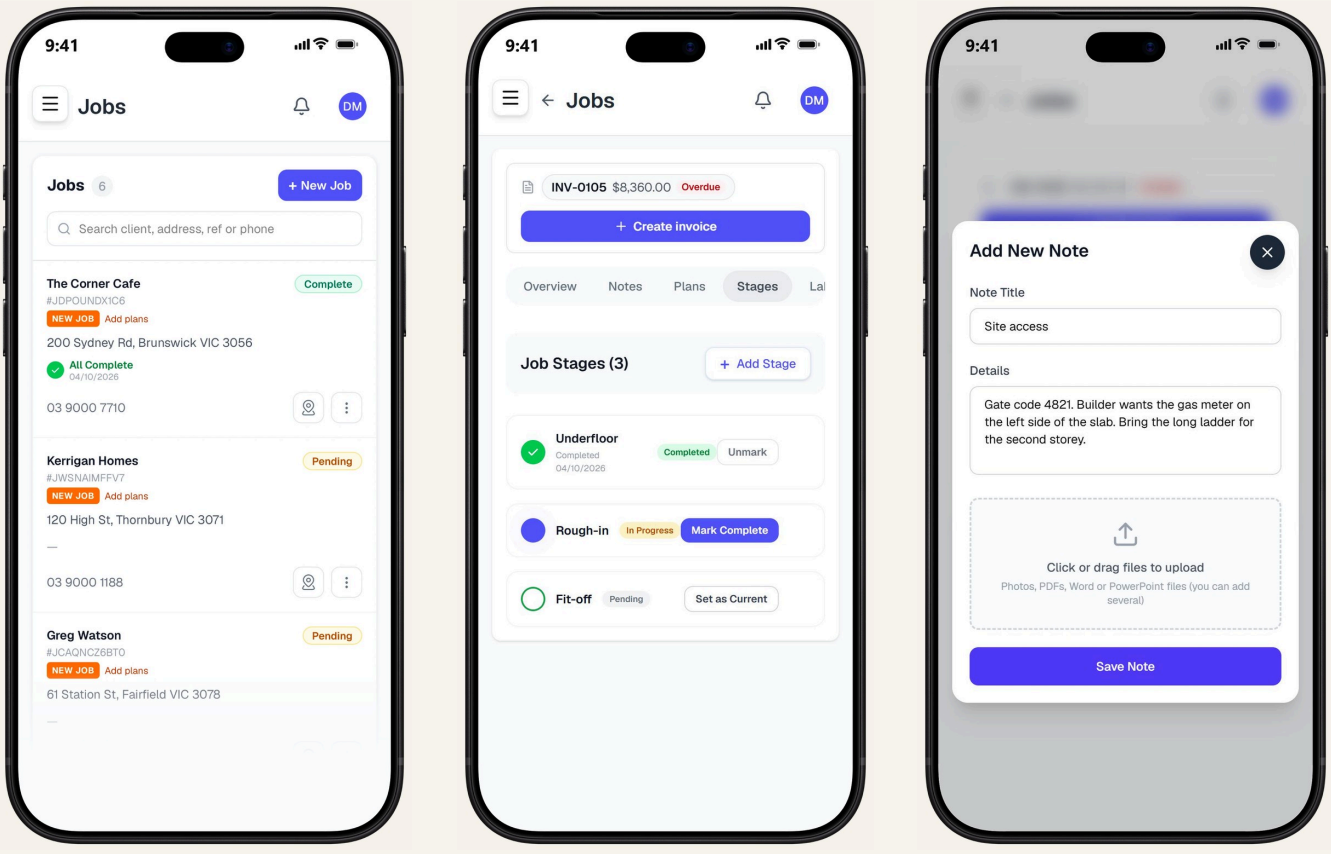
All the job's stages. They tick off as bookings are done. Invoice a stage from here, and see the invoice sent for it.

Labour

Time on the job from Start / Stop in My Tasks. Add or fix it here.

Costs

Receipts and materials, and the job's live profit.



Jobs list · Stages · Adding a note

What a job's *status* means

Every job in Jobs has a status. TradePal sets it as the job moves along, so you can see where everything is at a glance.

Pending

Not booked in yet.

In Progress

Booked on the Schedule or has staff on it, even if the booking is weeks away. Finishing one booked stage keeps it In Progress while more is booked.

Incomplete

Couldn't be finished (My Tasks or the Schedule). It goes to the top of the Schedule's Jobs list, flagged urgent, ready to book again.

Completed

Set to Completed in My Tasks with nothing else booked. Each booking also completes its stage on the job by itself.

NEW JOB

The orange label on a job nobody has opened or booked yet, such as one made when a client accepts a quote. It goes once you open or book it.

Add job info

Shows until the job has a stage, plan, note or photo. Plans are optional: any one of these clears it.

FIND IT FAST

In Jobs, search by job number, title, client or address, filter by status (Active hides finished jobs) and sort by newest, oldest, client, current stage or status.

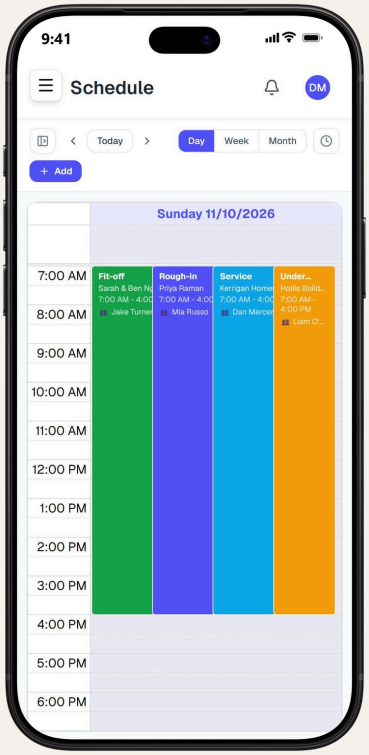
JOB TITLES

Give a job a short title when you make it, e.g. Kitchen reno. It shows next to the job number, on the Schedule and on your crew's My Tasks.

Book the *crew*

The Schedule is your whole team's week. Book once and everyone sees it on their phone. View it by Day, 2 days, 3 days, Mon–Fri, Week or Month.

Menu › Schedule



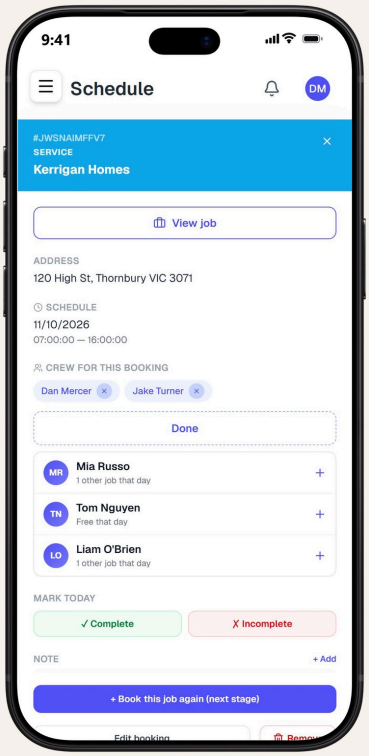
1. **Tap a job to book it**
   In the Jobs panel, tap the job to pick the days and times, or tap Book this job on the job itself. On a computer you can also drag it onto the calendar: it's booked from the start of your visible hours to 4pm.

2. **Pick the stage and crew**
   Tap the booking. Each person shows whether they're free, busy or on leave that day.

3. **Need a closer look first?**
   Tap (i) on a job for its address, description and site contacts.

4. **Change it any time**
   Drag a booking to move it, or stretch it. A booking over several days shows as one block a day.

5. **Book every stage**
   Each stage can have its own booking. As each is done, the next one shows as the job's stage in Jobs.



URGENT

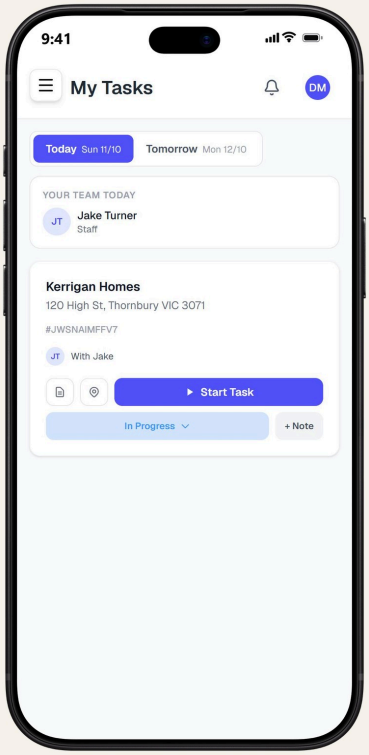
Red jobs at the top of the Jobs panel couldn't be finished. Book them again first.

TIP

Record sick days and leave in the Leave tab. They show on the calendar, so nobody gets booked by mistake.

Your crew's *day*

Staff open TradePal on their phone and everything they need is in My Tasks.



1. **Clock on**
   On the Dashboard, pick the vehicle and tap Clock in. Pause for a break or time away, then Resume. Location is shared only while clocked on.

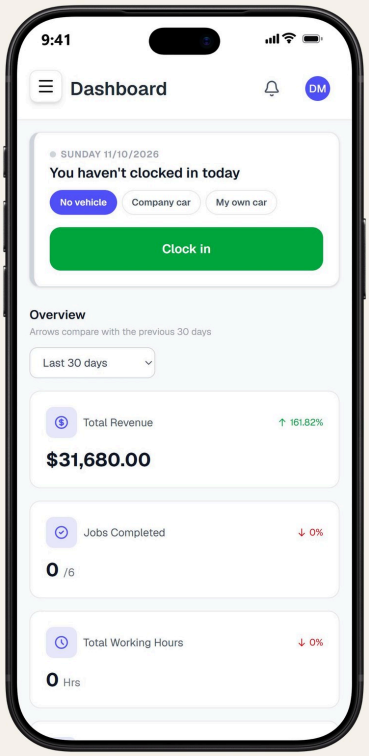
2. **Open My Tasks**
   Today's and tomorrow's jobs, with the address, documents, site contacts and who they're working with.

3. **Start the task**
   Tap Start Task when they arrive. Leaving site for a bit? Pause, then Resume. Those hours go on the job.

4. **Snap receipts**
   The purple receipt button next to Clock in (see p.23).

5. **Mark it**
   Completed: the stage ticks off on the job. Couldn't finish: it goes back to the office to book again.

6. **Clock off**
   Hours go straight onto their timesheet, worked out with your pay rules. More work tonight? Clock on again: it's a second shift that day.



TIMESHEETS

Forgot to clock on, or to start a task? Add or fix it in Timesheet (shifts and job time). Staff changes wait in Time approvals until an owner or supervisor approves them, and you can adjust them first. Nothing counts until it's approved.

PAYROLL

Off sick? Staff tap Sick day in Timesheet and attach a certificate (see p.20). Export all staff to CSV or PDF for payroll from Timesheet › Export.

OPTIONAL

Leave, sick days and *allowances*

Track leave balances, approve sick days with a certificate and pay meal allowances, all inside the timesheet, so payroll has everything in one place.

Switch it on

Settings › Pay Rules

1. **Meal allowance**
   The amount, and how many hours someone works in a day before it's paid.
2. **Leave**
   Annual and sick hours earned for each finished pay week, the length of a standard day, and leave loading %.
3. **Set each person's balances**
   Staff › open them › Leave › Set balances, as of today. Untick Earns leave each pay week for casuals.

Sick days

4. **Staff tap Sick day in Timesheet**
   Pick the dates (or part of a day), attach a photo or PDF of the certificate and send it.
5. **You approve it**
   It waits at the top of Timesheet with a link to the certificate: Approve, Approve unpaid, or Don't approve with a reason.

Other leave

Tap Add leave in Timesheet, or use the Leave tab on the Schedule. Choose paid or unpaid, the hours, and attach a certificate if there is one. Leave shows on the calendar, so nobody gets booked by mistake.

What you see

Timesheet
A Leave list for the pay period, plus Leave and Allowances (car and meal) totals. Total pay includes leave, and the CSV and PDF exports include it all.

Staff › Leave
Annual, sick and loading balances in hours, days and dollars, with their leave history.

Your crew
See their own pay and leave balances in their profile.

STARTING OUT

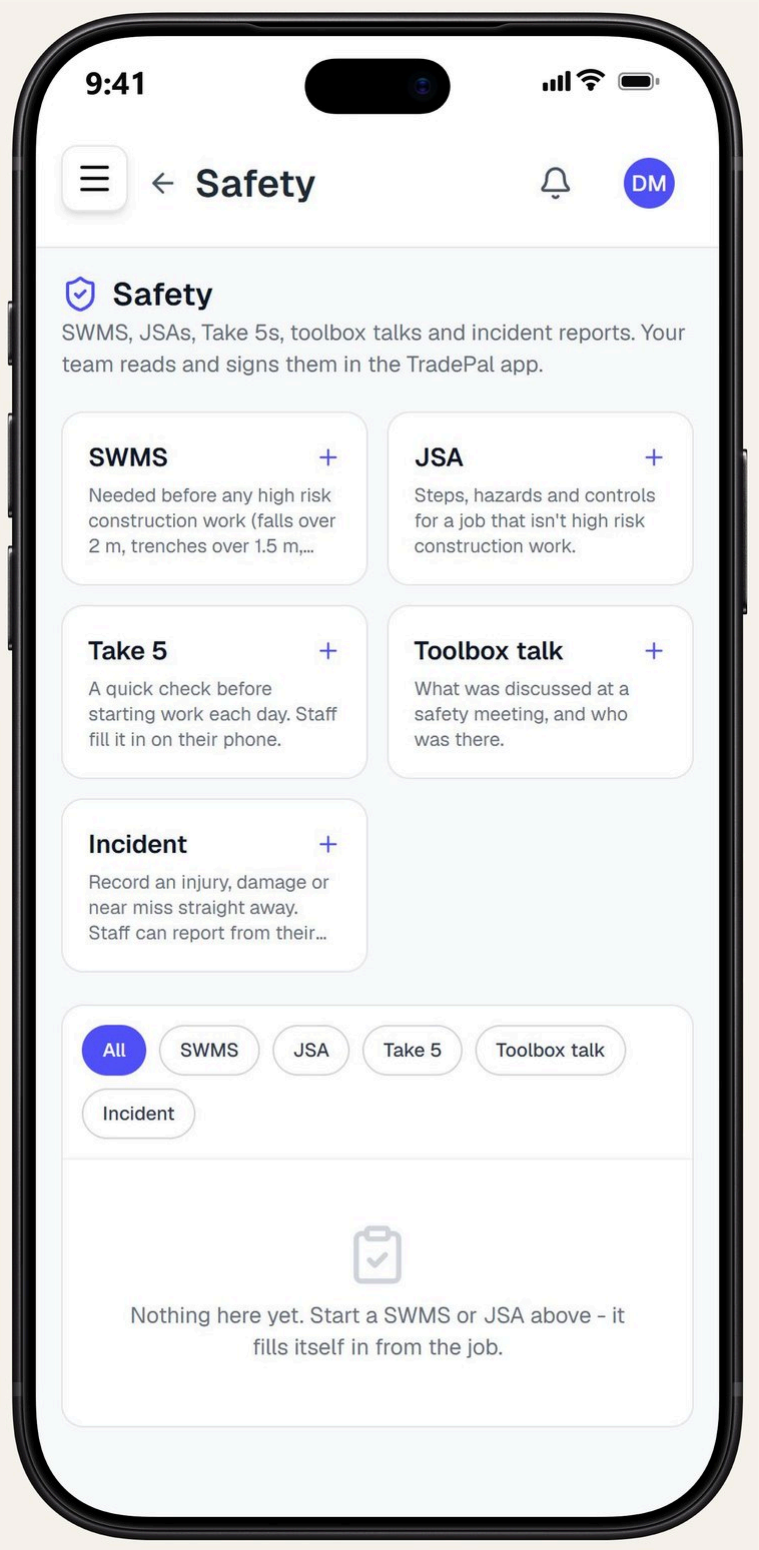
Leave recorded before you switch this on isn't counted, so set everyone's balances from your payroll figures on the day you start.

Safety paperwork, *sorted*

SWMS, JSAs, Take 5s, toolbox talks and incident reports, made from the job and signed on your crew's phones.

Menu › Safety

1. **Tap + on the form you need**
   Pick the job. The client, address and crew fill in for you.
2. **Fill in the job details, then add the steps**
   Choose ready-made tasks, or tap Draft with AI: it fills in the steps, controls, PPE, permits and licences. Check it all suits your site.
3. **Tap Finalise**
   Your team can now read and sign it in the TradePal app.
4. **Your crew sign on their phone**
   You can see who has signed. Tap PDF any time to download or print it.
5. **Next job the same?**
   Tap Make a copy instead of starting again.



ON SITE

Toolbox talk: type the topic and tap Write the talk with AI. Staff do their Take 5 on their phone, and can report an incident straight away.

The day at a *glance*

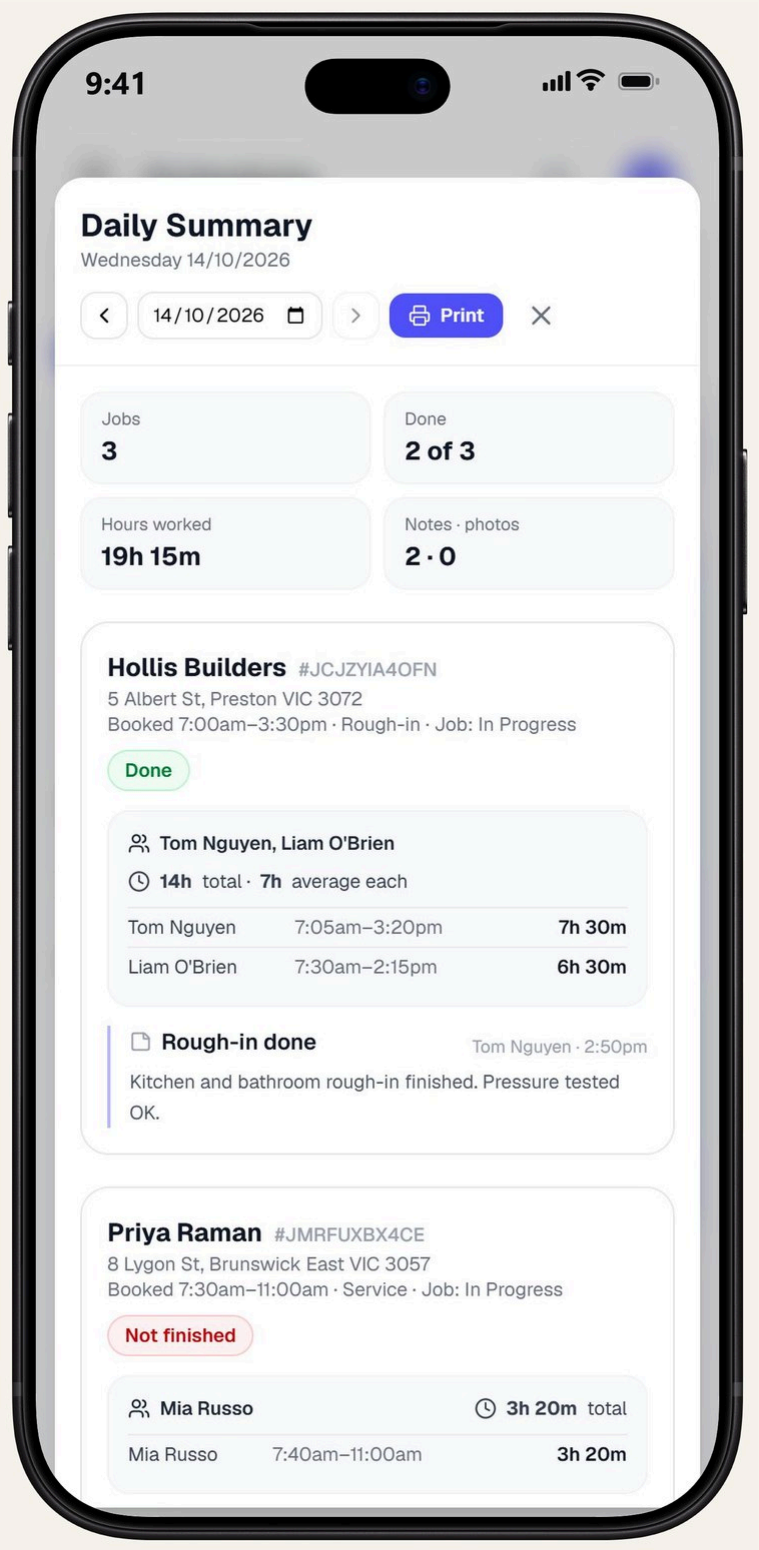
See every job from one day on a single page: who was there, whether it got done, how long it took, and the notes and photos they added.

Menu › Schedule › Daily Summary

1. **Open the Daily Summary**
   It opens on today. Use the arrows or the date box to look back at any day.
2. **Check each job**
   The staff on it and its status for the day: Done, Not finished or Not marked yet.
3. **See the time**
   Each person's start and finish times and hours, plus the job's total.
4. **Read the notes and photos**
   Only the ones added that day. Tap a photo to see it full size.
5. **Tap Print**
   A clean A4 page for your day records. Choose Save as PDF to keep a digital copy.

MAKE IT A HABIT

Checking the Daily Summary each afternoon saves opening every job one by one, and it's a record if a client ever asks what happened on site.



PART 4

Receipts and *expenses*

Every receipt lands on the right job, so each job's profit is real. Anyone in the team can add one.

Snap it

1. **Tap the purple receipt button**
   On the Dashboard, next to Clock in.
2. **Take a photo or choose the file**
   A receipt or a supplier invoice (photo or PDF).
3. **Pick the job, or leave it**
   Leave it and TradePal works out the job from the delivery address or job number on it.
4. **AI reads it**
   Supplier, date, invoice number, total, GST and what it was for.

Where it goes

On the job
Job › Costs, counted in the job's profit. Matched ones say how they were matched, so you can check them.

Miscellaneous expenses
Anything TradePal can't place, like fuel or shop supplies. Find it in Reports. Put each on a job, or keep it as a general business expense.

Settings › Costs
Every receipt for the financial year by category and supplier, ready to download for your accountant.

HABIT

Snap receipts on site, before they fade in the ute. Staff never see amounts: you check them in Costs.

SUBCONTRACTORS

Subbies' *invoices*

Subbies send you their invoices inside TradePal, and each line lands on its job as labour once you approve it.

Set them up

1. **Add them to TradePal**
   With your invite link, like any staff member.
2. **Set their pay to Subcontractor**
   Staff › open them › Edit › Pay.
3. **Put them on the job**
   They can only bill jobs they're booked on.

What the subbie does

4. **Upload invoice or New invoice**
   On their dashboard, instead of Clock in. Upload reads a paper or PDF invoice into lines. New invoice is a blank one to fill in.
5. **One line per day of work**
   Date, job, what for and the amount. GST is added if they're registered.
6. **Send to the office**
   Past invoices stay in My invoices to view, print or save as PDF.

What you do

Invoices › Subbie invoices

1. **Check it**
   Move any line that's on the wrong job, or Send back with a note to fix.
2. **Approve**
   Each line now counts as labour on its job, in the job's profit.
3. **Pay it, then Mark as paid**
   The subbie is told when it's approved and when it's paid.

WEEKLY

Approve them weekly so job profit stays accurate. Lines only count once approved, so your numbers are always right.

Invoice and get *paid*

Invoice straight from the job. There's nothing to retype.

1. **Open the job and tap Create invoice**
   Tick what you're billing: the whole quote, a category, or extra items, and pick the job stage it's for. Or tap Invoice on the stage in Job › Stages.

2. **Not from a job?**
   Invoices › New invoice. Type the job address or job number to link the job, and the client and address fill in.

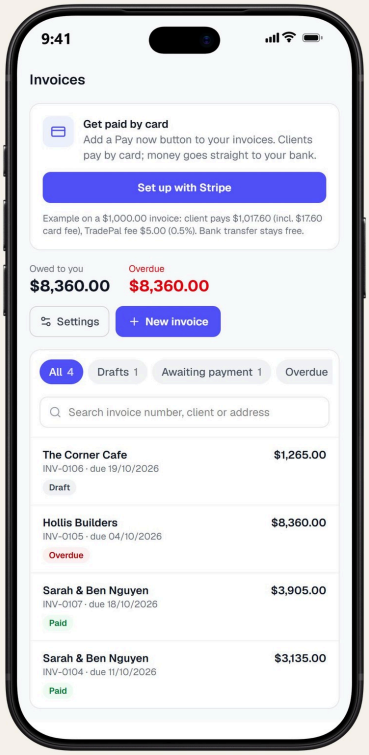
3. **Check it and tap Send**
   Your client gets the invoice by email with a Pay now link if card payments are on.

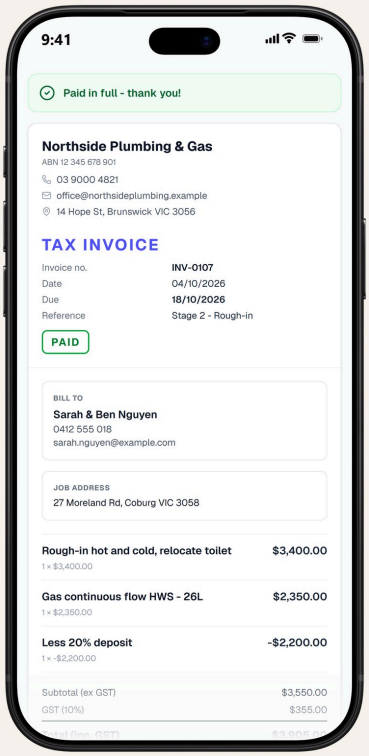
4. **Get paid**
   Card payments mark the invoice Paid by themselves. Bank transfers: record the payment, or let Xero match it.

5. **Keep an eye on what's owed**
   Invoices shows Owed to you and Overdue at the top, with Draft, Awaiting payment, Overdue and Paid filters.

CASH FLOW

Billing big jobs by stage keeps cash coming in. Invoice each stage as soon as its booking is done. Each stage on the job shows the invoice sent for it, so nothing gets missed.





Know what every job *made*

Each job's Costs tab shows the money in and the money out, while the job is still on.

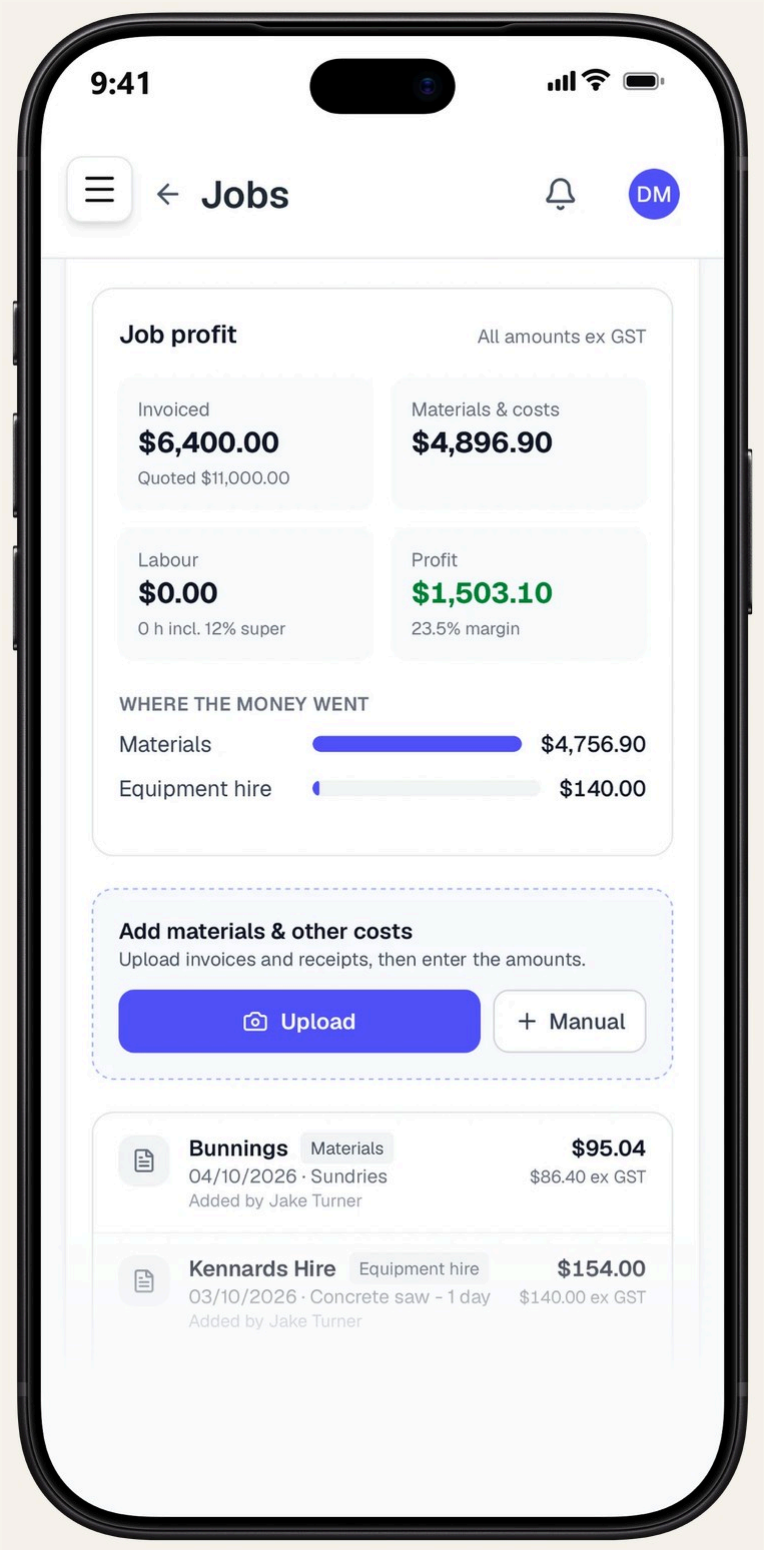
Invoiced
What you've billed.

Materials and costs
Receipts and supplier invoices.

Labour
Hours on the job × pay (plus super), and approved subbie invoices.

Profit
What's left, and the margin.

1. **Snap receipts as you go**
   They land on the job (see p.23).
2. **Approve subbie invoices**
   Their lines join the job's labour.
3. **Check the profit before the final invoice**
   Spot a blown budget while you can still do something about it.
4. **Look at Reports each month**
   Income, costs, profit, cash received, what's owed and your quote win rate for the business.



The TradePal *routine*

The businesses that get the most out of TradePal keep to a simple rhythm.

Every day

- Crew clock on, do their Take 5 and work from My Tasks.
- Snap receipts on site.
- Leave notes and photos on the job, not in texts.
- Mark each booking done (or couldn't finish).
- Check the Daily Summary, then tomorrow's Schedule. Book any red jobs first.

Every week

- Quote new work within a day of the site visit.
- Follow up quotes that are Viewed but not accepted.
- Invoice every finished stage.
- Chase anything Overdue.
- Approve time changes, sick days and subbie invoices, then pay subbies.
- Check timesheets and export them for payroll.

Every month

- Check Reports and each job's profit.
- Clear Miscellaneous expenses: put each on a job or keep it general.
- Update your Line item library with new prices.
- Make sure everyone's pay is current.

Need a hand?

Chat with us on tradepalapp.com.au or email **support@tradepalapp.com.au**. A real person is always one tap away. Switching from another app? We'll move your data across for free.

TradePal

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