



## Operational & Administrative Systems for Trade Businesses

We work with trade and construction businesses to build the systems, processes and tools that create real operational clarity. Whether you're starting from scratch or optimising what you already have, we go in, build it out and hand it back ready to use.

### QUOTING, INVOICING & JOB MANAGEMENT

- Quoting systems and templates
- Invoice setup and sending workflows
- Progress claims and variation documentation
- Job tracking and pre-build setup
- Purchase order systems
- P&L tracking and reporting
- Overdue invoice follow-up processes
- Client communication templates

### SCHEDULING, JOB FLOW & SITE OPERATIONS

- Job scheduling and calendar systems
- Internal communication workflows
- Trigger-based site-to-office communication
- Subcontractor coordination
- Site diary and daily reporting
- Defect and warranty tracking
- Tool and asset registers
- Handover and completion checklists

### COMPLIANCE, SAFETY & DOCUMENT MANAGEMENT

- SWMS and safety plan templates
- Cloud-based compliance document storage
- Site notes and job record organisation
- Licence and certification expiry tracking
- Induction and pre-start documentation
- Incident reporting processes
- Insurance and subcontractor registers
- Audit-ready folder structures

### SOFTWARE, AUTOMATION & AI INTEGRATION

- SimPro and Tradify setup and optimisation
- Xero and accounting software integration
- Full system setup from scratch
- Optimisation of existing platforms
- Automation of repetitive admin tasks
- AI tools introduced to save time
- Cloud storage setup and structure
- Works across all major industry platforms

### PEOPLE, ONBOARDING & BUSINESS DOCUMENTATION

- Employee onboarding systems
- Custom employee handbooks
- Role-specific procedure guides
- Delegation-ready task documentation
- A-Z administrative and operations manuals
- New staff onboarding packs
- Business owner handover documentation
- Scalable systems built for growth

*Every engagement is scoped individually to your business. We build it, document it and hand it back ready to use.*