



HELPSHEET: NZ SOLE TRADER HOW TO ADD YOUR BUSINESS DETAILS TO YOUR TRADIE TERMS TEMPLATE

Purpose

In this help sheet we will demonstrate how to add your business details into your Terms of Trade Template.

It is essential for consumer laws that your terms of trade name your business so that your customers know who they are trading with.

Video Tutorial

Prefer to watch how this is done? Check out our [short video here](#) (1min watch)

STEPS TO FOLLOW

Ensure you have **saved your template** to your own drive. Visit our Help Centre for a helpsheet on how to do this.

STEP 1 | GO TO CLAUSE 2 'OUR CONTRACT'

>Open your saved word document > navigate to the Our Contract section.

TT_HS_004_NZ SOLE TRADER_HOW TO ADD YOUR BUSINESS DETAILS HELPSHEET

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2. **Our Contract** Your acceptance of the Quote/Cost Estimate and these general terms together constitute our agreement with you (this **Contract**). This Contract governs the agreement between **REGISTERED COMPANY: INSERT YOUR LEGAL COMPANY NAME (COMPANY NUMBER XXX) OR SOLE TRADER: INSERT YOUR FULL NAME TRADING AS INSERT YOUR TRADING NAME (if different to your registered company name) (us)** and you, the named customer in the Quote/Cost Estimate, in respect of the Goods and Services.

>If you are a **SOLE TRADER**> Go to the Sole Trader highlighted wording

Troubleshooting>You will need to insert your full legal name

For example: JOSEPH SAMPLE BLOGGS

STEP 2 | INSERT YOUR FULL GIVEN LEGAL NAME

Our Contract Your acceptance of the Quote/Cost Estimate and these general terms together constitute our agreement with you (this **Contract**). This Contract governs the agreement between **REGISTERED COMPANY: INSERT YOUR LEGAL COMPANY NAME (COMPANY NUMBER XXX) OR SOLE TRADER: JOSEPH SAMPLE BLOGGS TRADING AS INSERT YOUR TRADING NAME (if different to your registered company name) (us)** and you, the named customer in the Quote/Cost Estimate, in respect of the Goods and Services

> insert your full given legal name in the yellow highlighted area



STEP 3 | INSERT YOUR TRADING NAME

Our Contract Your acceptance of the Quote/Cost Estimate and these general terms together constitute our agreement with you (this **Contract**). This Contract governs the agreement between **REGISTERED COMPANY: INSERT YOUR LEGAL COMPANY NAME (COMPANY NUMBER XXX) OR SOLE TRADER: JOSEPH SAMPLE BLOGGS TRADING AS INSERT YOUR TRADING NAME** (us) and you, the named customer in the Quote/Cost Estimate, in respect of the Goods and Services

>Insert your trading name

A **trading name** is the name you use in your marketing and to identify yourself. For example: ABC Plumbing may be a **trading name** of your sole trading business which you operate under your own individual name JOSEPH SAMPLE BLOGGS

STEP 4 | INSERT YOUR NZBN (if applicable)

Our Contract Your acceptance of the Quote/Cost Estimate and these general terms together constitute our agreement with you (this **Contract**). This Contract governs the agreement between **JOSEPH SAMPLE BLOGGS TRADING AS ABC PLUMBING (NZBN 1234567891)** (us) and you, the named customer in the Quote/Cost Estimate, in respect of the Goods and Services

>If you have an NZBN Number as a sole trader > insert after your trading name>

Troubleshooting: Not sure of your NZBN or if you have registered? Visit <https://www.nzbn.govt.nz/> for more information on how to register your sole trading business with an NZBN or to search for your NZBN if you have forgotten it.

Our Contract Your acceptance of the Quote/Cost Estimate and these general terms together constitute our agreement with you

>Your business details should look like this (if you do not have

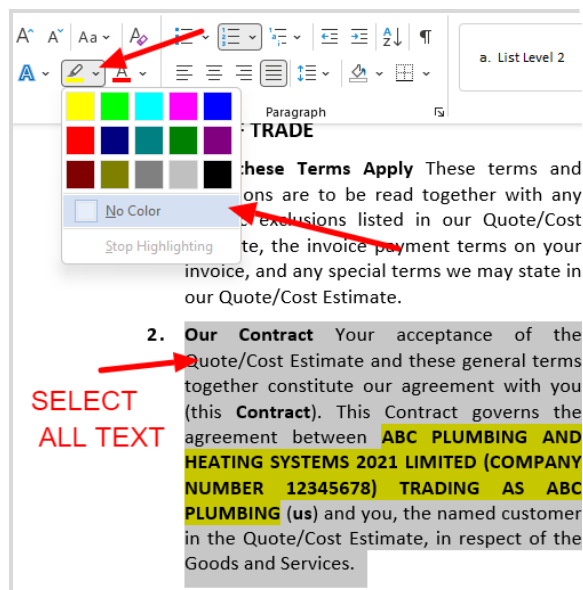


an NZBN number, the wording in brackets will not be included)

STEP 5 | TIDY UP YOUR TEMPLATE

>Tidy up your formatting >Delete all text that does not apply to you (e.g. sole trader sections if you are a registered company and vice versa

>remove the **YELLOW BOLD HIGHLIGHT** >select the whole clause> navigate up to the top right of your word ribbon> select the 'Text Highlight' icon> Select No Colour



END OF HELPSHEET