



HELPSHEET: HOW TO OFFER TERMS OF TRADE TO PHONE BOOKINGS

Purpose

In this help sheet we provide you with guidance on how to offer your **terms of trade** to a **phone booking** so that your terms and conditions apply at **the time of booking**.

Key Information

- Your terms of trade must be offered to your customer to view and be accepted **before** you perform the work or services if they are to apply.
- If you take bookings via phone and do not issue a separate quote or estimate, you need a **method to confirm your contract for services** with your customer so that your pricing is accepted and your terms of trade apply.
- This means your customer must be able to **view and read** your terms of trade **before** accepting the services.
- There are a few ways that your customers can **accept your terms of trade** for a phone booking:
 - **By clicking an online link** provided in an **email confirmation** to view the terms of trade page on your website
 - **By receiving an email confirmation** of the job booking **with your terms of trade attached** as a PDF or a hyperlink to the terms of trade page on your website



- **By viewing the terms of trade** from an **SMS Text** that directs them to your terms of trade and rates published on your website.

Option 1 | Insert a Hyperlink to Your Terms of Trade Page to a Confirmation Email

1	<p>Load your terms of trade to your website and create a web-address that opens the terms of trade page or PDF. See our Help Centre for guidance on this.</p> <p>e.g. www.yourwebsite.com/terms-of-trade</p>
2	<p>Add Tradie Terms recommended wording to your Confirmation Email issued to your customer and include a hyperlink to your web-page containing your terms of trade and a link to your privacy policy.</p> <p>By placing your booking with us you are agreeing to our Terms of Trade. All personal information collected for the purposes of our services will be treated in accordance with our Privacy Policy.</p>

Option 2 | Attach your Terms of Trade to your Confirmation Email

1	<p>Attach your terms of trade to your Confirmation Email as a PDF attachment.</p>
2	<p>Add Tradie Terms recommended wording to your Confirmation Email issued to your customer and include a PDF attachment containing your terms of trade and a link to your privacy policy.</p>



	By placing your booking with us you are agreeing to our Terms of Trade attached to this email . All personal information collected for the purposes of our services will be treated in accordance with our Privacy Policy .
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Option 3 | Direct your Customer to a Link containing your Terms of Trade in your Confirmation SMS

1	Load your terms of trade to your website and create a web-address that opens the terms of trade page or PDF. See our Help Centre for guidance on this. e.g. www.yourwebsite.com/terms-of-trade
2	Add Tradie Terms recommended wording to your Confirmation SMS issued to your customer and include a hyperlink to your web-page containing your terms of trade and a link to your privacy policy. By placing your booking with us you are agreeing to our rates and terms. You can view these by clicking Terms of Trade . All personal information collected for the purposes of our services will be treated in accordance with our Privacy Policy

Troubleshooting: If you don't have a privacy policy, Tradie Terms offers a 'Website & Privacy Policy Kit'. [Visit our Store to purchase](#).

END OF HELPSHEET