FREE CHECKLIST

How to Onboard Large Commercial + Municipal Clients

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THANK YOU!

Thank you for downloading this **Tradie Terms FREE Checklist on HOW TO ONBOARD LARGE COMMERCIAL AND MUNICIPAL CLIENTS**.

Think of this as your business blueprint to:

\>>navigate through the **complex** set up steps with larger clients with ease
\>>get **paid on time**.

These steps are gathered from my 15+ years of working inside types of organisation and will not only get you **paid on time** but will present you as **professional** whilst getting established with this client type**.**

Hope it helps.

All the best,

Sian

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CHECKLIST: ONBOARDING COMMERCIAL + MUNICIPAL CLIENTS

COUNTRY: ALL

PURPOSE

Working with commercial and municipal clients is different to domestic customers. They often have more complex requirements around quoting, pricing and invoicing.

This checklist is designed to help you identify the key questions and information you should gather when setting up a new commercial or municipal client.

If you follow these recommendations, you can get paid faster and more reliably.

***Note: This checklist is not designed for subcontracting to builders or construction firms*.**

FEATURES OF COMMERCIAL and MUNICIPAL CLIENTS

A commercial client is:

- A business who needs your services or goods but is not subcontracting you to perform their services
- A charity or other organisation such as a local club or society
- An iwi (NZ)

A municipal client is:

- A local utility company (electricity line company, fibre broadband, gas distribution)
- A local authority (local or regional council, port, state or state-owned utility)
- A central government agency (ATO, IRD, Business Ministry)

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ONBOARDING CHECKLIST

Use the table below to ask the **right questions at the right time** and **get prepared** to be paid for work and services performed to this category of client.

CHECKLIST ITEM	WHAT YOU NEED TO KNOW	CHECKLIST ACTION	DONE
New Supplier Form	Many commercial or municipal clients have finance departments that require you to complete a *new vendor form* or a *new supplier form* so that they can load you into their system. If you do not complete this, you do not get set up and they *can't* pay you. This is usually *in addition* to any other paperwork you've been asked to supply or sign. Your GST number • An NZBN number (if they use e invoicing) • Your bank details (with a deposit slip from your bank or a screenshot of details from your internet banking) • Your postal address • Your contact information	***Ask if you need to complete a new supplier form***	☐
Accounts Payable Email Address	Most commercial and municipal clients have a dedicated department or person who manages payments and processes invoices. It is essential you know where to send your invoices if you want to get paid on time.	***Ask for the email address to issue invoices to***	☐
Purchase Order and PO Number	A purchase order is a legally-binding document issued by a purchaser of goods and services. This is the primary method of accepting your 'contract' used by a commercial and municipal client. • A purchase order has a number allocated to it • You must add this number to your invoice so the accounts payable team can reconcile it in their system. If you forget to add it, the accounts team *cannot* pay you so it's **up to you** to add this! • Some commercial or municipal clients require you to wait to be issued a purchase order (PO) as confirmation your estimate or quote is accepted • Note that this type of client will rarely ever 'click'	***Ask if you will be issued a purchase order number***	☐

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	to accept a quote or 'confirm' your quote or estimate by email. Instead, they will confirm your engagement by issuing the purchase order to you.		
Work Order and WO Number	If you are engaged to perform *ongoing* or *scheduled, repeat services* on an *ad hoc* or *'sometimes*' basis for a commercial or municipal client, they may use a **work order** system to issue work instructions to you. • This may be in a document (word or spreadsheet) or an email • It is often a template that sets out the location, type of service (e.g. a repair, a tag & test, a tree removal or something like that) and a number to identify the work in the client's job scheduling tool or system (e.g. #WO45678) • Usually, the accounts payable team will require this work order number to be on your invoice *or* added to an excel spreadsheet that is to accompany your invoice to list out the jobs you did and the work order number for each job.	***Ask if you will be required to wait for a work order to commence services***	☐
Service Contract vs Terms of Trade	Check whose terms of trade will apply. Often commercial or municipal clients have their own terms for the work or services they want you to perform. This means your terms of trade **will not apply** and so it is **essential** you know in advance if you need to have a lawyer review them or read them yourself to check what risks you will accept if using their terms. • These may be called a variety of titles including, Service Agreement, Purchase Order Terms or Works Agreement as just a few examples. • If you have tendered for the work and services, the client's contract should already be included in the RFT (Request for Tender) or RFP (Request for Proposal), • Sometimes, this type of client ask you to supply your terms of trade. You must have a full and complete set ready to offer.	***Ask/Check if your client has their own service contract or terms you are required to work to.***	☐
Deadline Date for Invoice Submission	Many commercial and municipal clients **batch invoices** and pay on one set date each month. If you miss this cut-off date, you may not be paid until either a later pay	***Ask what day of month you need to***	☐

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	run (possibly end-of-month) or even the month following. • For example,in New Zealand many commercial and municipal entities ask you to submit invoices by 5th of month for payment on 20th of the same month • Others may only pay the following month - this can be hard for cashflow • Property and strata (Australia) managers often pay last day of month	***submit invoices by***	
Variations	Commercial and municipal clients require an invoiced amount to exactly match the PO amount. This is not within their control to change and so you must ensure all your variations and additional costs are pre-approved with an updated or new PO. If you have variations on your job, you need to check in advance: • How to lodge a variation request - your contract may have a form or you may be required to email a specific contact person (usually the project contact person) • Whether you need to ask for a new PO for the variation and invoice separately • Or if you are required to amend the original PO to reflect the higher price and submit one invoice	***Check how to issue variation requests in advance***	☐
Invoice Schedules + Work Packs	Once you have completed your services, your client may require you to submit a pack of 'evidence' or job information as a work pack. The invoice may not be valid without this information. • This may be photographs of a site • It may be a job-card • It may be an excel spreadsheet completed with key details against the work order information you received	***Check what is required to be submitted with your invoices and in what format.***	

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