



# HELPSHEET: MYOB ESSENTIALS HOW TO ADD YOUR TERMS OF TRADE TO QUOTES + INVOICES

**Country: All**

## **Purpose**

In this help sheet we provide a step by step guide to adding your terms of trade to your **MYOB ESSENTIALS Quote and Invoice settings**.

## **Key Information**

- Terms of Trade must be **added or linked** to quotes or estimates so that they are accepted by your customer at the correct time. This time is at the **quoting or estimate or order stage**.
- 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.
- This means your customer must be able to **view and read** your terms when reviewing your Quote/Estimate/Order.
- There are a few ways that your customers can accept your terms of trade:
  - By clicking an online link to accept a quote/estimate
  - Confirming acceptance of your quote/estimate by email
  - Issuing a Purchase Order (i.e. by a commercial client)
  - Paying your deposit to confirm your services are accepted
  - Confirming you can come onto their Site or Premises to commence works

MYOB Essentials\_How to Add Terms of Trade to Quotes\_Terms Published to Websites

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- Your invoices should refer back to your terms of trade and include key reminders about your rights to collect fees for late payment.

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# ADDING A LINK TO ONLINE TERMS OF TRADE TO YOUR QUOTES

## Purpose

In this section we provide links to the MYOB Essentials help articles that explain how to add your terms of trade into your MYOB Essentials settings where you have **published your terms of trade to your website**.

MYOB Essentials offers you an option to add the URL (webpage address) into your **Quote** to link your terms of trade to your quotes/estimates in the **Notes to Customer** field.

We provide you with sample wording to add to **Notes to Customer** fields to confirm your terms are **accepted** with your quotes/estimates.

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## FAQS

**Do I need terms of trade to be located on my website?** For this option, yes. To apply this option you will need the URL (webpage address) of the page that contains your terms of trade.

**What is my URL?** This is the website address that a customer can click or copy+paste into their website browser to view your terms of trade. Check that the exact wording you insert for the URL address (i.e. [www.website.com/terms-of-trade](http://www.website.com/terms-of-trade)) works to open your terms of trade into your browser.

**Do I have to do this for every quote?** No you don't, as long as you follow the steps below, the wording will be saved for future quotes.

**How will I know if my customers have read the terms of trade?** You won't know this. However, as long as you have *made it possible to view them*, you have met your consumer obligations.

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## STEPS TO FOLLOW

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- Go to **Customer Notes** in your MYOB settings. See MYOB article [here](#).
  - View this help article from the MYOB Support Community [here](#) on where to add **customer notes** into your Quotes in MYOB Essentials
  - Go to the **Notes to Customer** field in your Quote/Invoice settings
  - Insert the Custom wording below into this field
  - Select '**Remember this**' to ensure this wording appears on all future Quotes
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## CUSTOM WORDING TO ADD TO 'CUSTOMER NOTES' SECTION - QUOTES

THANK YOU FOR CHOOSING US  
IMPORTANT INFORMATION | PLEASE READ

TERMS OF TRADE: Our terms of trade are located at [{insert your URL e.g. www.website.com/terms-of-trade}](#). These terms are accepted by you when you click any link supplied to confirm acceptance, reply to confirm acceptance of our Services by email, pay a deposit, issue a purchase order to us or accept our personnel onto your Site or Premises.

COMMERCIAL CUSTOMERS: Please note that if you have your own purchase order terms, our terms of trade shall apply.

Thank you for your custom.



# HOW TO ADD YOUR TERMS OF TRADE TO QUOTES\_EMAIL ATTACHMENT

## Purpose

In this help sheet we provide links to the MYOB Essentials help articles that explain how to add your terms of trade into your MYOB Essentials settings.

If you do not publish your terms of trade to your **website** this option is available to you.

The MYOB Essentials software offers you a way to add an **attachment of your Terms of Trade as a PDF** to your quotes/estimates.

Whilst there is a field to add **Notes to Customer**, this field does not allow you to paste the entire text of your terms of trade into it.

Therefore, you need to use the option available in MYOB Essentials to add an **attachment** (a PDF) of your terms of trade to **each email** you issue with a Quote or Estimate.

We also provide you with sample wording to add to **Notes to Customer** fields to confirm your terms are **accepted** with your quotes/estimates.

## Key Information

- Terms of Trade must be **added or linked** to quotes or estimates so that they are accepted by your customer at the correct time. This is before you commence work at the **quoting or estimate or order stage**.
- 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.
- This means your customer must be able to **view and read** your terms when reviewing your Quote/Estimate/Order.

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- There are a few ways that your customers can accept your terms of trade:
  - By clicking an online link to accept a quote/estimate
  - Confirming acceptance of your quote/estimate by email
  - Issuing a Purchase Order (i.e. by a commercial client)
  - Paying your deposit to confirm your services are accepted
  - Confirming you can come onto their Site or Premises to commence works
- Your invoices should refer back to your terms of trade and include key reminders about your rights to collect fees for late payment.

## FAQS

**Why can't I attach the terms to the back of my quote?** Our research shows that MYOB Essentials only offers you an option to **attach your terms of trade to your cover email** issued with your quote.

**Do I have to do this for every quote?** Yes, you need to follow this step to attach your terms of trade to each quote. We recommend saving your terms of trade to an easy-to-access folder on your computer.

**How will I know if my customers have read the terms of trade?** You won't know this. However, as long as you have *made it possible to view them*, you have met your consumer obligations.

## STEPS TO FOLLOW

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Follow these steps to attach your terms of trade document to quotes/estimates.

- Fill in your Terms of Trade Word template with your **business details**.
- Save your Terms of Trade as a PDF.
- Go to **Customer Notes** in your MYOB settings. See MYOB article [here](#).
- View this help article from the MYOB Support Community [here](#) on where to locate the settings and how to attach your PDF terms of trade.
- Use your **PDF** version of your Terms of Trade from your download kit to attach to your MYOB quote/estimate email.
- Add our Custom Wording (see below) into the **customer notes** section of your Quote in MYOB Essentials so that your customer is **informed** that your terms of trade are **attached** to your email.

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## CUSTOM WORDING TO ADD TO 'CUSTOMER NOTES' SECTION

THANK YOU FOR CHOOSING US FOR YOUR PROJECT  
IMPORTANT INFORMATION | PLEASE READ

TERMS OF TRADE: Our terms of trade are attached to your email issued with this quote/estimate. These terms are accepted by you when you click any link supplied to confirm acceptance, reply to confirm acceptance of our Services by email, pay a deposit, issue a purchase order to us or accept our personnel onto your Site or Premises.

COMMERCIAL CUSTOMERS: Please note that if you have your own purchase order terms, our terms of trade shall apply.

Thank you for your custom.



# HOW TO LINK YOUR TERMS OF TRADE TO YOUR INVOICES

## Purpose

In this help sheet we provide links to the MYOB Essentials help articles that explain how to link back to your terms of trade into your MYOB Essentials **Invoices**.

We also provide you with sample wording to add to **Notes to Customer** fields to confirm your terms that were **accepted** with your quotes/estimates **continue to apply** at the time of invoicing.

## Key Information

- Terms of Trade must be **added or linked** to quotes or estimates so that they are accepted by your customer at the **quote/estimate/order stage** of your sales process.
- This means your customer must be able to **view and read** your terms when reviewing your Quote/Estimate/Order.
- By the time you have issued an **invoice** for goods or services already performed, you have missed your opportunity to supply your terms. However, it is **good practice** to include a **reminder** of your terms of trade with your invoices.
- Your invoices should refer back to your terms of trade and include key reminders about your rights to collect fees for late payment.

## SAMPLE WORDING TO ADD TO YOUR INVOICE 'NOTES TO CUSTOMER' FIELD

You must include your terms of trade into your Quotes/Estimates so that your customer has accepted them prior to you commencing work or services for them.

However, you will still want to cross-reference your terms of trade in your **invoices**.

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In this section, we include some sample wording that you can add into the **Notes to Customer** field in your **invoices**.

Our recommended sample wording is designed to:

1. Inform your customer of key information about the need to pay on time
2. Confirm that your terms of trade apply and where to locate them

## FAQS

**Do I need terms of trade to be added or linked to my invoices?** By the time you have issued an invoice, you have either completed work or your customer has accepted your quote/estimate. That is the time to offer your terms of trade (before you start work).

However, it assists with cost recovery to 'remind' their customers that your terms of trade apply and where to locate them.

**Why do I need to tell customers default interest or cost recovery fees may apply?** This is to remind your customers about these important rights that you have. Your rights will still apply as long as you attached or linked your terms of trade to your quote or estimate. However, it assists with debt recovery and collections if your invoices also **clearly inform** your customers that these rights can be used if they fail to pay on time.

## STEPS TO FOLLOW

- View this help article from the MYOB Support Community [here](#) on where to add **customer notes** into your **Invoices** in MYOB Essentials
- Go to the **Notes to Customer** section of your Invoice settings
- Insert the applicable **custom wording below** in your **Notes to Customer field** in your Invoice settings
- Select '**Remember this**' to ensure this wording appears on all future Invoices

## CUSTOM WORDING FOR INVOICES

Select the wording in yellow highlight that applies to the option you used to attach or link your terms of trade

### THANK YOU FOR CHOOSING US

We thank you in advance for your prompt payment.

**DIRECT CREDITS:** Please pay into account number xx-xxxx-xxxxx and quote your invoice number as a reference.

**ONLINE PAYMENTS:** Please use the links provided to pay with your credit/debit card.

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LATE OR OVERDUE PAYMENTS: Please be aware that late or overdue payments may incur default interest at our published rates located in our Terms of Trade. Cost recovery fees and expenses may also apply. For further information, please refer to our terms of trade {located at [www.yourwebsite.com/terms-of-trade](http://www.yourwebsite.com/terms-of-trade) which were accepted by you with our Quote/Estimate}{attached to your email with your Quote/Estimate}.

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