



HELPSHEET: HOW TO ADD TERMS OF TRADE AND CUSTOM TEXT TO YOUR FERGUS QUOTES + INVOICES

Country: All

Purpose

In this help sheet we provide a step-by-step guide to adding your terms of trade and **custom description and footer text** to your **Fergus Quote and Invoice settings**.

Key Information

- Terms of Trade **must be added or linked** to quotes, estimates or booking forms 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

©Copyright Tradie Terms® 2019-2022. All Rights Reserved.

Disclaimer: Tradie Terms does not control the Fergus platform and accepts no responsibility for any system bugs or issues that may affect the completion of this procedure. This procedure is based on Tradie Terms' knowledge of how to achieve the desired outcome to embed terms of trade and custom text and follows the Fergus published procedure guides where available.

Fergus issued procedures are also available at www.fergus.com.



ATTACHING TERMS OF TRADE TO QUOTES

INFORM YOUR CLIENTS ABOUT YOUR TERMS OF TRADE	
1	Download a PDF of your Terms of Trade.
2	Add Terms of Trade to Quotes Follow this guide from Fergus to upload your Terms of Trade into Fergus.
3	Attach Terms of Trade to Initial Emails Issued from Fergus Follow this guide from Fergus to attach your Terms of Trade to the initial email sent to a client. Note: This is an optional feature in Fergus and we recommend you turn this on.
4	Add Custom Text to Footers in Quotes and Invoices Follow the steps overleaf to add custom text to link your terms of trade to each of your quotes and invoices.

©Copyright Tradie Terms® 2019-2022. All Rights Reserved.

Disclaimer: Tradie Terms does not control the Fergus platform and accepts no responsibility for any system bugs or issues that may affect the completion of this procedure. This procedure is based on Tradie Terms' knowledge of how to achieve the desired outcome to embed terms of trade and custom text and follows the Fergus published procedure guides where available.

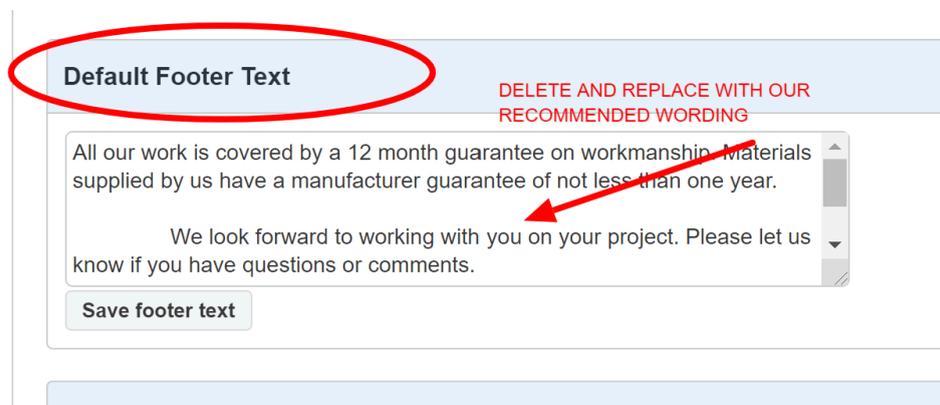
Fergus issued procedures are also available at www.fergus.com.

ADDING CUSTOM FOOTER TEXT TO QUOTES

ADD CUSTOM DESCRIPTION AND FOOTER TEXT TO YOUR QUOTES

This section sets out the steps to add the **Tradie Terms Custom Recommended Text** into each of these fields.

- 1 **Add Custom Footer Text to Fergus Quotes** Follow this [video guide from Fergus](#) (from 1:03 mins) to locate the custom *default footer text* fields in your Fergus Quotes



- 2 **Delete the Fergus default text** We recommend you delete this as it may not align to your terms of trade.

- 3 **Add text below to the *Default Description Text* field**

IMPORTANT INFORMATION | PLEASE READ

COST ESTIMATE: Our pricing is a **cost estimate** only unless we have specifically stated a quoted price.

TERMS OF TRADE APPLY: This quote/cost estimate and our accompanying terms of trade are accepted by you when you click any link to confirm acceptance, reply to confirm acceptance by email, issue a purchase order to us, pay us a deposit or accept our personnel onto your Site.

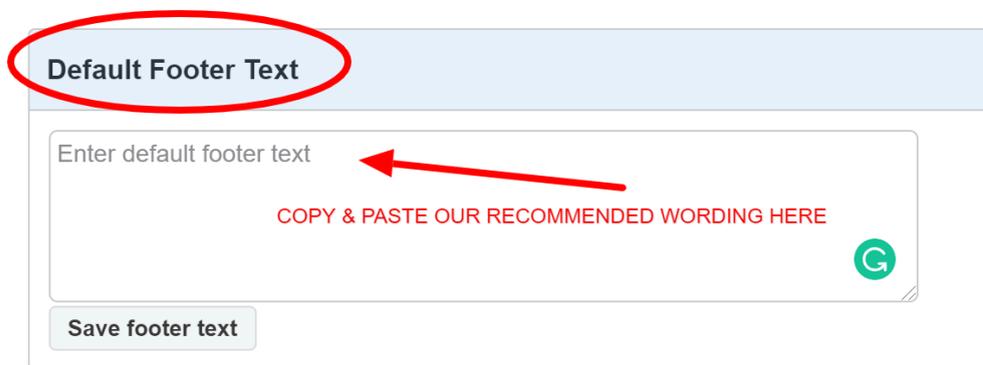
Thank you for the opportunity. We're looking forward to helping you.

ADDING CUSTOM FOOTER TEXT TO INVOICES

LINK TERMS OF TRADE AND ADD CUSTOM FOOTER TEXT TO 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.

- 1 **Add Custom Footer Text to Invoices** This appears on the foot of your invoice and links to the payment terms and supplies information on overdue charges that may apply.



- 2 **Add Custom Invoice Footer Text Below**

INSERT THE TEXT BELOW (IN ADDITION TO WHATEVER TEXT ALREADY LOCATED THERE)(e.g. bank account details, option to pay by credit card etc.)

Choose one:

OPTION 1: IF YOUR TERMS ARE LOCATED INSIDE QUOTE/ATTACHED TO EMAIL ISSUED FROM FERGUS

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 which were accepted by you with our Quote/Estimate.

Where applicable, this invoice is issued as a payment claim under the Construction Contracts Act 2002.

OPTION 2: IF YOUR TERMS ARE LOCATED ON YOUR WEBSITE (Add in your website URL address)

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 which were accepted by you with our Quote/Estimate.

Where applicable, this invoice is issued as a payment claim under the Construction Contracts Act 2002.

Note: Only insert a hyperlink or URL to your terms of trade if you have loaded these to your website. Otherwise, delete the wording in yellow.

END OF HELPSHEET

©Copyright Tradie Terms® 2019-2022. All Rights Reserved.

Disclaimer: Tradie Terms does not control the Fergus platform and accepts no responsibility for any system bugs or issues that may affect the completion of this procedure. This procedure is based on Tradie Terms' knowledge of how to achieve the desired outcome to embed terms of trade and custom text and follows the Fergus published procedure guides where available.

Fergus issued procedures are also available at www.fergus.com.