



Contractor onboarding document

How Does Houseace Work?

Houseace is an online platform for quoting and managing home projects, our web & mobile platform has a range of tools that digitizes each step in the process starting with the quoting engine which allows our users to build their own accurate quotes in a matter of minutes, match that with our customer focused team of project managers, designers and estimators which allows us to provide an end-to-end renovation experience.

Key Links:

Contractor explainer: www.houseace.com.au/contractors

Sign up page: www.houseace.com.au/sign-up - Click tradesperson account and fill out details

Quoting Engine: www.houseace.com.au/get-quote

Calculator: www.houseace.com.au/calculator

The process

1: Instant Estimate: We offer an upfront estimate through our pricing engine, the quote is based on set rates we have refined over the span of 4 years & 1000s of projects, these set rates get plugged into our pricing algorithm and used in conjunction with the user supplied data like project size, location & selected options to generate an accurate estimate on the spot.

2: Refined Estimate: Once the instant estimate is created our team reaches out to the client to refine the estimate to ensure its accuracy, in this step we gather information about the project so you have a solid idea of what needs to be done.

3: Site Visit: Unlike other platforms we choose one contractor, this means that you're not bidding against many other contractors and instead focusing on providing the best service possible. You will usually send a message through the project portal or call the client directly to arrange a site visit where you will verify any scope changes and notify us accordingly. Make sure you take lots of photos and note down anything important.



4: Final Quote: We pride ourselves on delivering top service quicker than anyone else in the market so rely on you to send us scope changes within a day so our team can finalise the quote, in the final quote the client will receive a scope list, schedule of work, progress payments and any documents required to get started. **The price you see on the app or website is your price - The client sees the full price so it's important to keep pricing discussion between our team and yours.**

5: Acceptance: Once the client reviews the final quote they can hit the accept button on our website or app to book it in, you get notified and we'll be in touch to get started.

6: Project management: It's important to understand that we are an online business so require all communication to go through the platform, this simplifies your workflow and allows us to keep track of progress. We've created easy-to-use tools to make project management a breeze:

A: Messages: This the central activity feed for the project, here you will post messages, photos, documents...etc everyone assigned to the project will receive communication and can respond.

B: Schedule: Our schedule manager is a bird eye view of what happens when, your job is to check off the task list as you progress and upload photos so our team is up to date.

C: Payments: Each project is different so we negotiate the payment schedule prior to starting the project, the client pays through our online payment system and we release it to you. This is why it's important to keep uploading photos so our payments team knows when to send payments. Send all invoices to payments@houseace.com.au

D: Variations: All pricing changes or new work once the project has started will be classified as a variation, we bill for this before doing the work to protect your interest so send the price and details on the message feed and we will send the customer an invoice on your behalf. We don't put any margin on variations and have an obligation to get the best price for the client so ensure your price is sharp.

E: Disputes: In the rare case of disputes we do our very best to help diffuse the situation, the best outcome is to come to an agreement but we will also provide support if it needs to be escalated.

7: Handover: Once you've got to the practical competition stage it's important to get a final list of defects to remedy (if any), this is best done by doing a walkthrough with the client and getting them to commit to the final list, post this list on the feed so its documents.

Questions?

If you need help with account setup, project queries or anything you can contact your project planner directly or send a question to hello@houseace.com.au.

Welcome to the team!

hello@houseace.com.au

www.houseace.com.au

1300 304 367

How to use the platform

Contractor Users



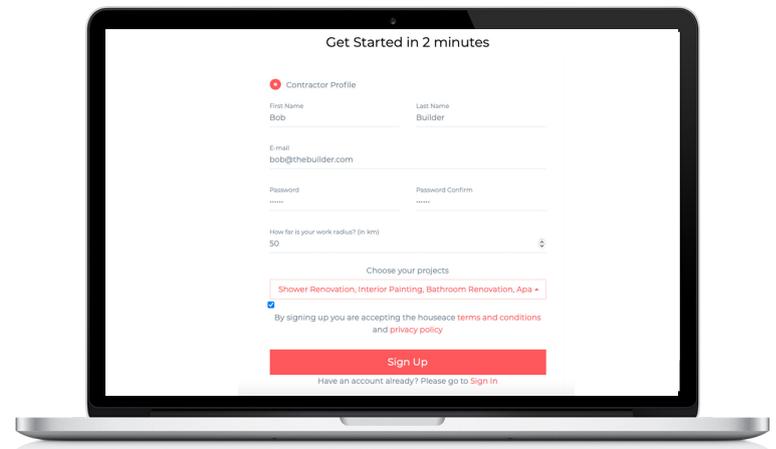
Contractor user guide

Welcome to Houseace, our platform and streamlined processes make renovating super easy for our clients. We couldn't do it without the help of talented tradespeople like yourself.

In this guide we'll take you through our streamlined process, platform tools and how to get the best out of working with us.

Setup your account

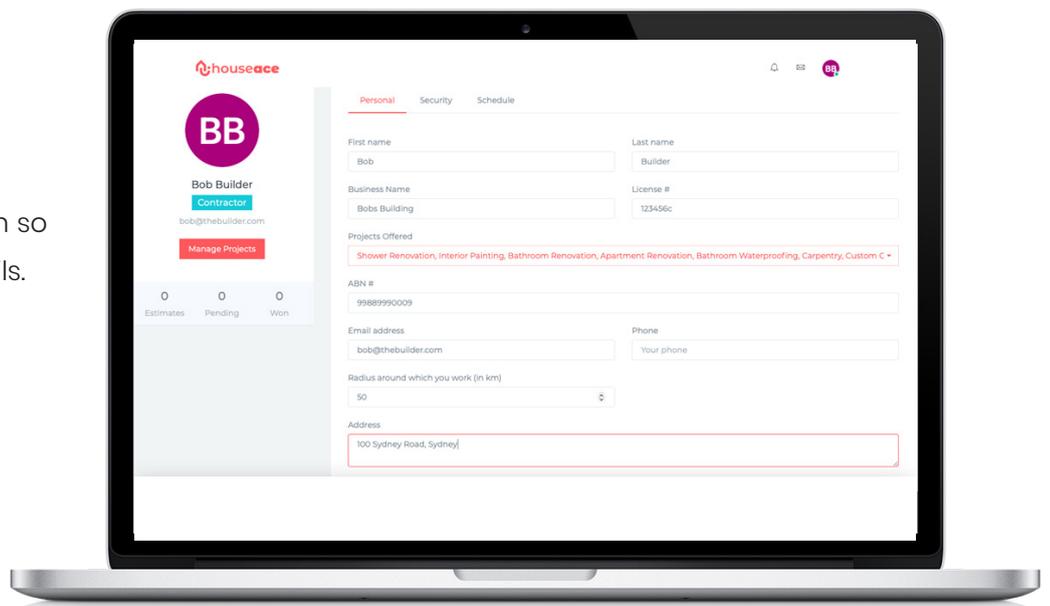
Go to www.houseace.com.au and sign up



Go to www.houseace.com.au/contractors and fill out the profile form. You'll get automatic access to the platform and be redirected to your Houseace account page where you can add the following details:

- Full name, phone number and address
- Add profile photo - This should be a photo of yourself.
- License & ABN number - Make sure these are active.
- Project offered - This tells us what you like doing.
- Radius of work - How far are you willing to go.
- Portfolio photos - Upload your best work.
- License photo and Insurance doc (Public liability) - Take a photo of both.

Our clients will see all this information so please ensure you complete all details.

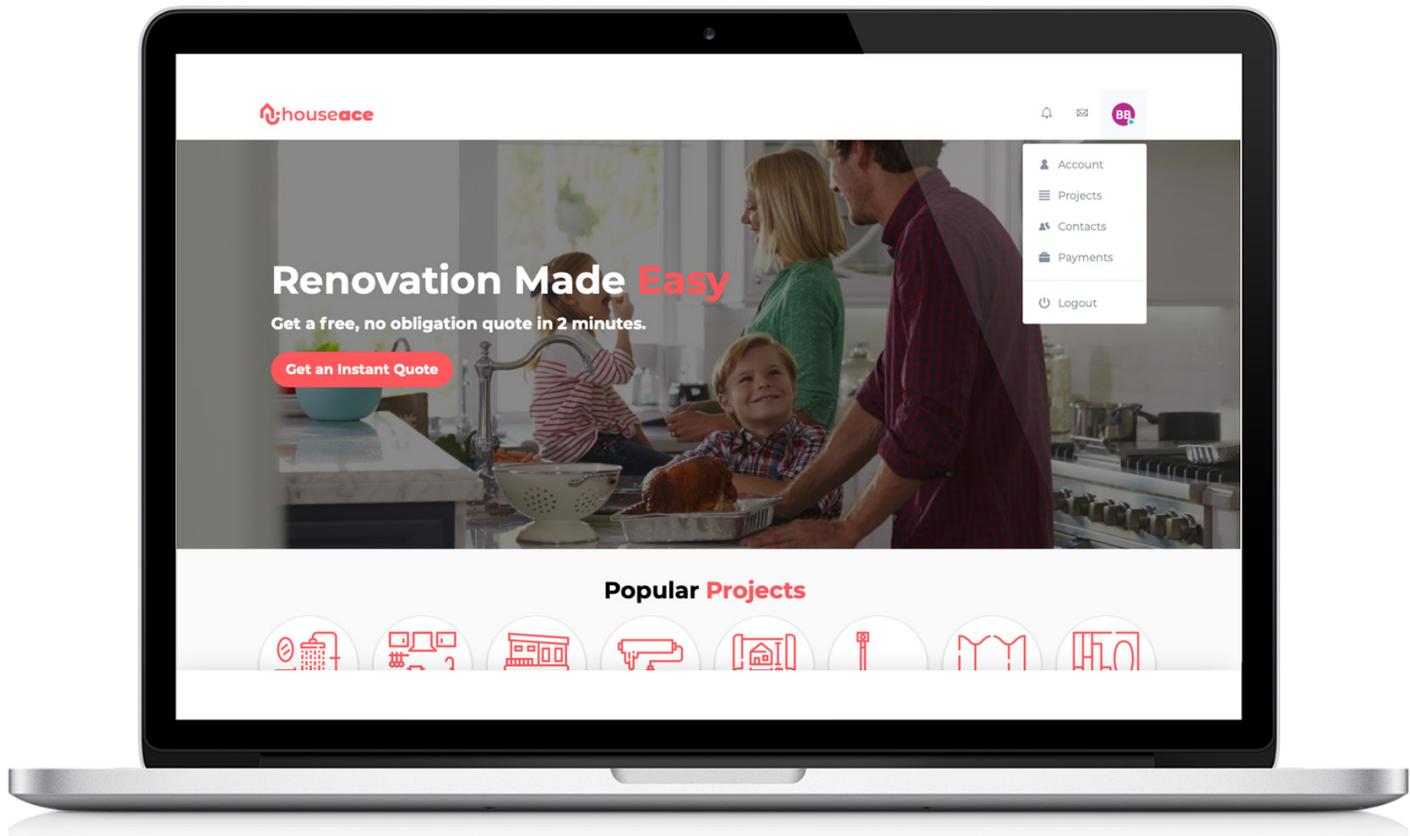


Navigation – Where to find everything

Desktop:

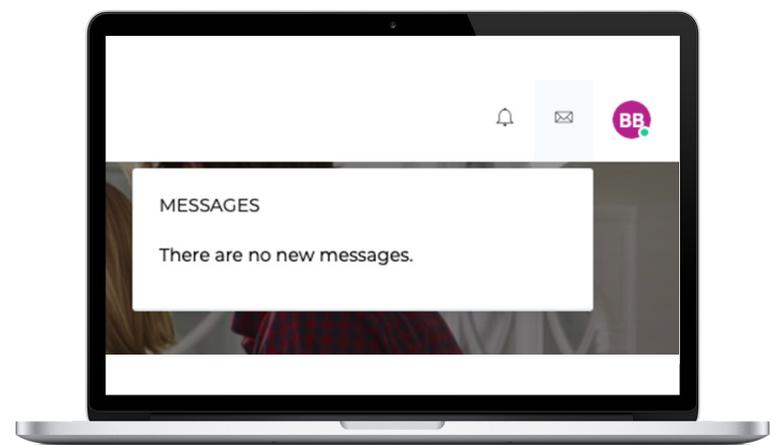
Main navigation to the right hand side of the header, the dropdown will have links to the following pages:

- Account** – This screen is where you'll manage your account and profile details.
- Projects** – This is the dashboard list view of the projects you're involved in.
- Contact** – This is a list of users you've added to your contacts book, you can view their contact details on this page.
- Logout** – Click this to be signed out of your account.

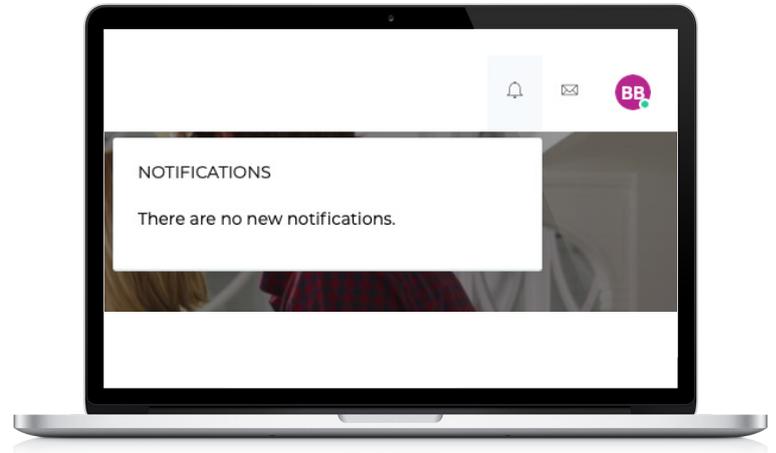


Outside that list you will see icons in the header, they link to the following:

- Message icon** – This will open up a list of your new messages on the projects you are assigned to, click the message to be taken to the associated project.



- b. **Notification icon** - This will open up a list of your new notifications on the projects you are assigned to, click the notification to be taken to the associated project.

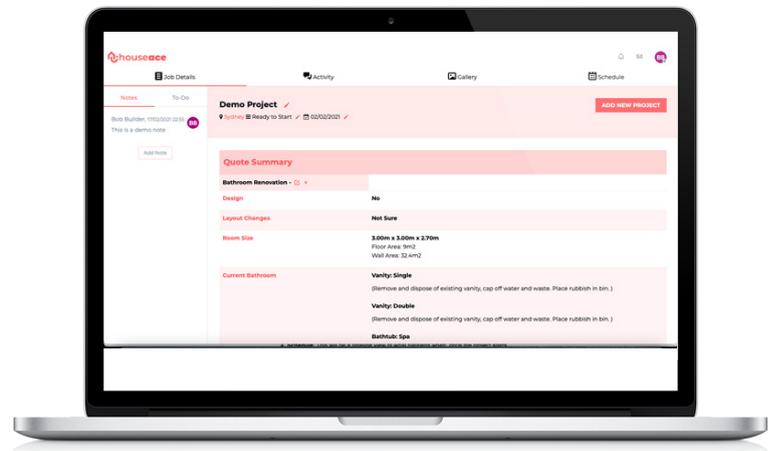


- c. **Search Icon** - Click this for a search form to appear, you can search by client name or project title.

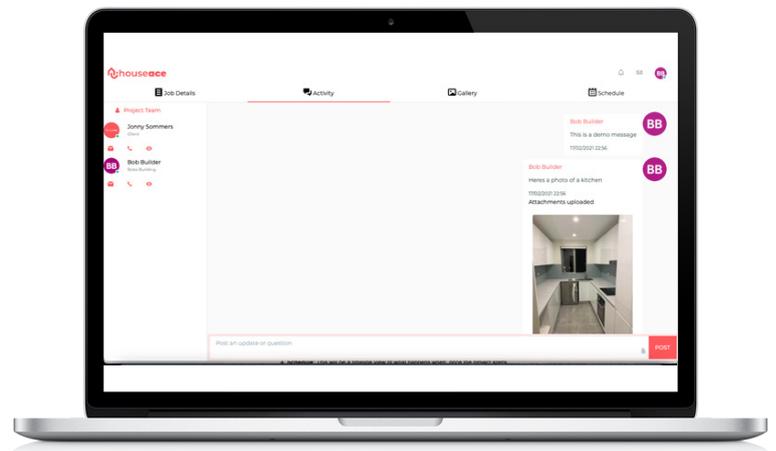
When on the Project page:

Project tabs:

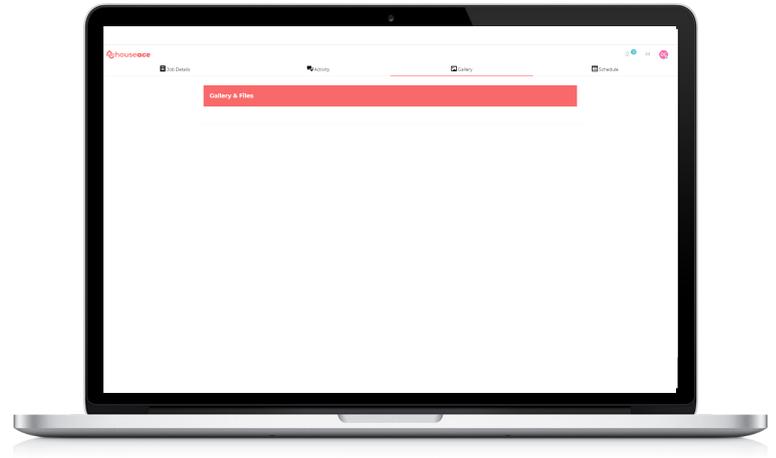
1. **Job details:** This is the full job scope, you will see your price and full scope. On this tab you will see an upload section, here you can add photos and documents. In the scope section you will see a detailed quote with inclusions and exclusions, to edit this quote you can click the pencil icon. Click the “Add new project” button to create new quotes to be added to this project.



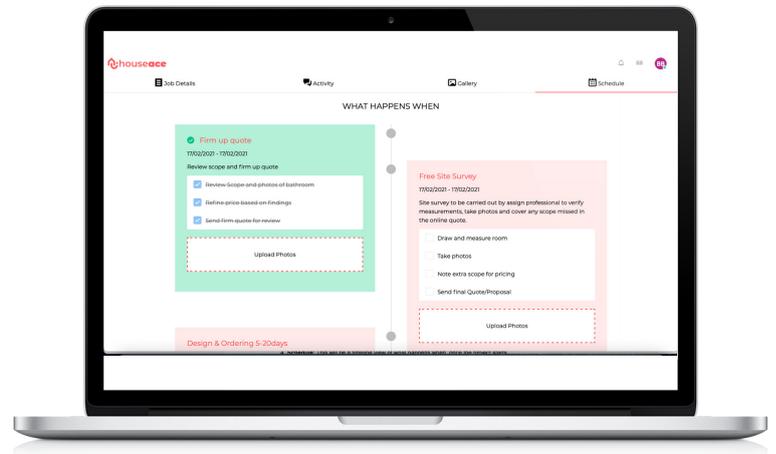
2. **Activity:** This is the messaging tab, here you can post messages to the client and everyone else involved in the project. In the side bar you can click the phone icon to call the user or the email icon to send an email directly. We encourage all written communication to be done on the message feed.



3. **Gallery:** This is where all photos and documents will be shown.



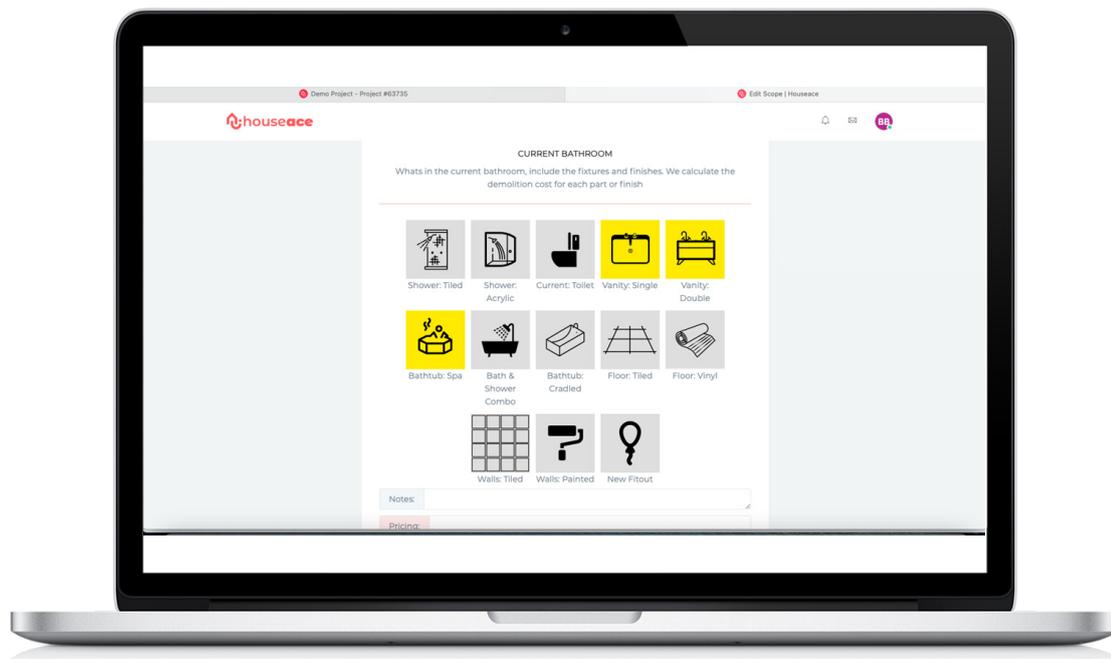
4. **Schedule:** This will be a timeline view of what happens when, once the project starts, it's your responsibility to check off each phase by ticking the boxes and clicking the "Mark Done" button.



Quote screen or Edit quote page

It's your responsibility to help us get the scope accurate and when on site you can either edit the existing quote or add a new one by clicking the "Add new project" button. The following steps must be taken.

1. **Ensure each option is correct** - This involves going through each step and selecting or deselecting the correct icons.

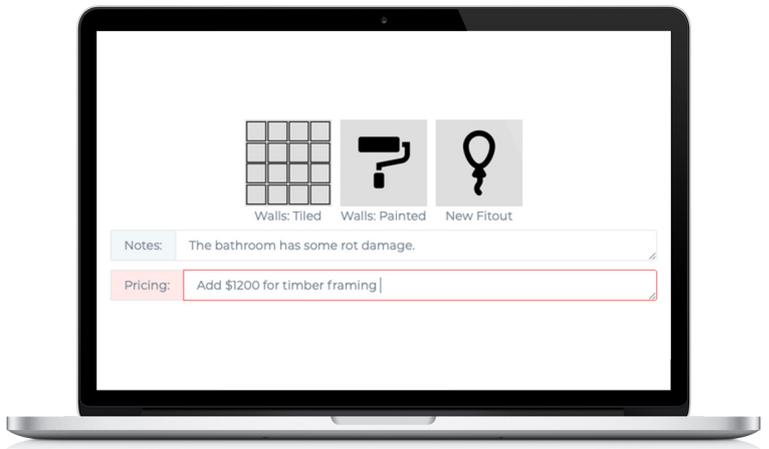


2. Add detailed notes in the “Notes” field at each option

- This will help us finalise the quote. The client can see this field.



3. Add pricing info to the “Pricing” field - Here you can put the manually priced items. The client cant see this.

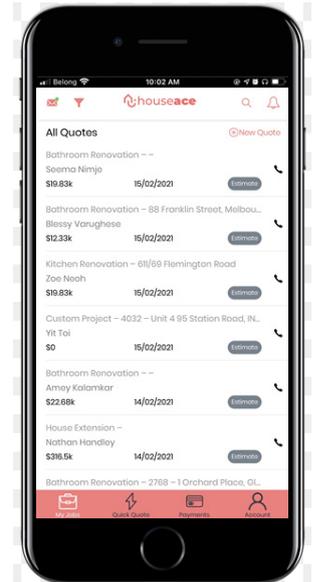


4. Take lots of photos - You're our eyes on site so we rely on your information to get the pricing right.

The Application – Apple and Android devices

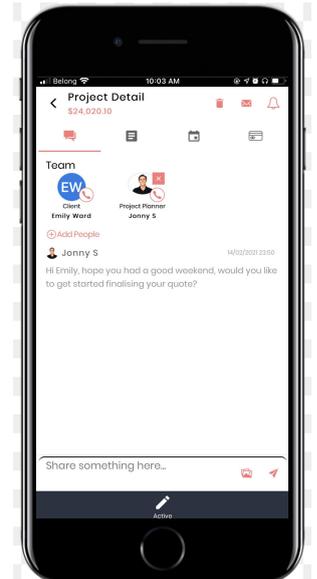
Key Screens:

1. **My Jobs:** This is your list view of projects you are assigned to. To call the client simply click the phone icon on the right.

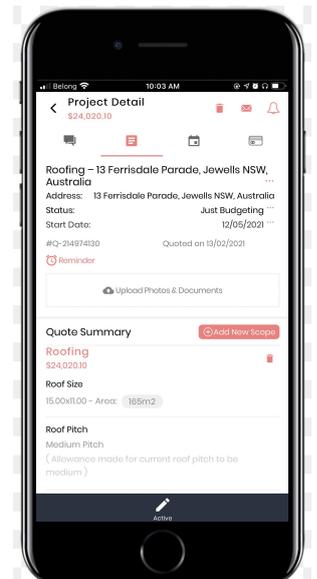


2. **Project Page:** This is a tabbed layout of the project page, very similar to the web version with the main tabs being:

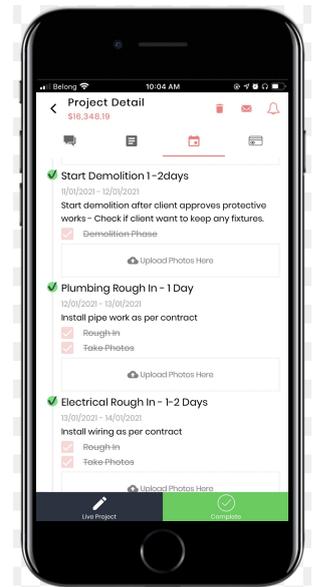
a. **Messages:** This is the default screen, you can post messages and photos to everyone assigned to the project. Scroll to the top to see who is assigned.



b. **Job Details:** This is the scope screen which shows the quote in detail and your pricing. There is also space to upload photos and documents.



c. **Schedule:** This is the timeline view of the project schedule of work, you can upload photos at each milestone and check off each task and mark each milestone as complete. This allows us to track progress..



2. **Account:** This is where you can update your profile information. It is important to keep your profile up to date because our clients will rely on this information to be accurate.

We constantly update our software and will keep you posted on improvements as we go.

Our streamlined process

- 1. Instant quote:** Our users come through our online quoting system, they fill out their project details and our pricing algorithm will generate an instant estimate. Our estimates are based on real market rates and use standard time scales to formulate a price on the spot.
- 2. Firm Quote:** Once the client has expressed interest to proceed our project planners will manually firm up the quote, this involves doing research on the property by looking at floor plans or photos, then manually making changes to the scope.
- 3. Site Survey:** This is where you come in, we only select 1 contractor to visit so make sure your first impressions last. In the site visit we will need you to take lots of photos and note down any parts of the scope that don't align with the online quote. We'll make the necessary adjustments.
- 4. Final Quote:** Once we have all the information we need to send a fixed price we will put together a final proposal on your behalf, this includes the final quote, schedule of work, payments list and contract.
- 5. Online Acceptance:** The client accepts the quote online and we send you an online contract for signing, from here you can set up insurances (if the project needs it) and bill for the deposit portion of the work.
- 6. Design & Selections:** We usually assign our designer to produce working drawings so you have a plan to work off and also help the client pick and arrange products and fixtures with our supplier network.
- 7. Project Management:** Once you're on site it's important to keep us updated with progress and issues if they arise, post photos at each milestone and make sure you use the messaging app to communicate, this will keep everyone updated with the project and save you calling multiple people.
- 8. Hassle free Handover:** All our projects are done with minimal issues on site so collect feedback from your client and we'll send in photographers so you can showcase your work.

Contact us

We hope this user guide has answered most of your questions but if you have anything further to ask you can contact us below:

 : help@houseace.com.au

 : 1300 304 367