

|                         |  |   |   |
|-------------------------|--|---|---|
| <b>Sync with</b>        | Xero / MYOB  | Xero / MYOB   |   |
| <b>Designed for</b>     | Tracking jobs costs, time, scheduling, client management, supplier management, reporting   | Tracking jobs costs, time, scheduling, client management, supplier management, reporting  | Tracking jobs costs, time, scheduling, client management, supplier management, reporting  |
| <b>Integration with</b> | Stripe / google calendar<br>SMS messaging  | Google calendar<br>SMS messaging  | 30 other apps for increased functionality<br><a href="https://www.workflowmax.com/add-ons">https://www.workflowmax.com/add-ons</a>  |
| <b>Jobs</b>             | <ul style="list-style-type: none"> <li>• Quotes</li> <li>• Individual jobs / jobs within a larger job</li> <li>• Assigning purchase orders</li> <li>• Scheduling staff / time on jobs</li> <li>• Invoicing</li> <li>• Kits (collection of materials/time for jobs)</li> <li>• Reporting</li> </ul> | <ul style="list-style-type: none"> <li>• Quotes</li> <li>• Auto creation of letters of approval / email</li> <li>• Individual jobs / jobs within a larger job</li> <li>• Assigning purchase orders</li> <li>• Scheduling staff / time on jobs</li> <li>• Invoicing</li> <li>• Favourites (collection of materials/time for jobs)</li> <li>• Reporting</li> <li>• Assigning of markup / discounts</li> </ul> | <ul style="list-style-type: none"> <li>• Quotes / Leads</li> <li>• Individual jobs / jobs within a larger job</li> <li>• Assigning purchase orders</li> <li>• Scheduling staff / time on jobs <ul style="list-style-type: none"> <li>◦ Mobile app with timer</li> </ul> </li> <li>• Invoicing</li> <li>• Kits (collection of materials/time for jobs)</li> <li>• Reporting</li> </ul> |
| <b>Invoicing</b>        | <ul style="list-style-type: none"> <li>• Full / Partial / WIP</li> <li>• Assigned to specific jobs / sites</li> <li>• Population from collected data</li> <li>• Emailing to clients</li> <li>• Sync with Xero</li> <li>• Review status</li> </ul>  | <ul style="list-style-type: none"> <li>• Full / Partial / WIP</li> <li>• Assigned to specific jobs / sites</li> <li>• Population from collected data</li> <li>• Emailing to clients</li> <li>• Sync with Xero</li> <li>• Review status</li> <li>• Tracking of variations made to quotes</li> </ul>  | <ul style="list-style-type: none"> <li>• Full / Partial / WIP</li> <li>• Assigned to specific jobs / sites</li> <li>• Population from collected data</li> <li>• Sync with Xero</li> <li>• Review status</li> </ul>  |
| <b>Purchases</b>        | <ul style="list-style-type: none"> <li>• Assign to jobs</li> <li>• Completed for invoicing with markup</li> <li>• For kits / line items</li> <li>• Categories</li> </ul>   | <ul style="list-style-type: none"> <li>• Assign to jobs</li> <li>• Completed for invoicing with markup</li> <li>• For favourites / line items</li> <li>• Categories</li> </ul>  | <ul style="list-style-type: none"> <li>• Assign to jobs</li> <li>• Completed for invoicing with markup</li> <li>• For line items</li> <li>• As linking with Xero / possible inventory tracking</li> </ul>   |
| <b>Suppliers</b>        | <ul style="list-style-type: none"> <li>• Import from Xero</li> <li>• Set up parts list / importation of price books</li> <li>• Multiple pricing levels incl. markups</li> </ul>  | <ul style="list-style-type: none"> <li>• Import from Xero</li> <li>• Set up parts list / importation of price books</li> <li>• Multiple pricing levels incl. markups</li> <li>• Integration with suppliers for syncing pricing</li> </ul>   | <ul style="list-style-type: none"> <li>• Import from Xero</li> <li>• Set up parts list / costs manually</li> <li>• Multiple pricing levels incl. markups</li> </ul>   |

|                   |  |  |   |
|-------------------|--|--|---|
| <b>Customers</b>  | <ul style="list-style-type: none"> <li>• Import from Xero</li> <li>• Multiple sites (contracts) under singular client</li> <li>• Tiered pricing</li> </ul>                 | <ul style="list-style-type: none"> <li>• Import from Xero</li> <li>• Multiple sites (contracts) under singular client</li> <li>• Tiered pricing / Terms per customer</li> </ul>  | <ul style="list-style-type: none"> <li>• Import from Xero</li> <li>• Multiple sites (contracts) under singular client</li> <li>• Tiered pricing</li> </ul>            |
| <b>Users</b>      | Multiple <ul style="list-style-type: none"> <li>• Billing rates</li> <li>• Notifications</li> <li>• User permissions</li> <li>• GPS tracking (mobile app)</li> </ul>       | Multiple <ul style="list-style-type: none"> <li>• Billing rates</li> <li>• Notifications</li> <li>• User permissions</li> <li>• GPS tracking (mobile app)</li> <li>• Team setups for different groups</li> </ul>               | Multiple <ul style="list-style-type: none"> <li>• Billing rates</li> <li>• User permissions</li> <li>• Team setups for different groups</li> </ul>                    |
| <b>Pricing</b>    | <ul style="list-style-type: none"> <li>• \$39 per user per month</li> <li>• \$9 other user no access</li> </ul>  | Pricing is convoluted / tiered.<br>See pricing in Features   | Variable.<br>\$30 for singular - \$350 for 100  |
| <b>Reporting</b>  | Reports for <ul style="list-style-type: none"> <li>• Jobs</li> <li>• Productivity</li> <li>• Time</li> </ul>   | Reports for <ul style="list-style-type: none"> <li>• Business</li> <li>• Invoicing</li> <li>• Quoting</li> <li>• Staff</li> <li>• Jobs</li> </ul>  | Reports for <ul style="list-style-type: none"> <li>• Invoicing</li> <li>• Performance</li> <li>• Time</li> <li>• WIP</li> <li>• Customs reports</li> </ul>            |
| <b>Mobile app</b> | <ul style="list-style-type: none"> <li>• Full integration with web version</li> <li>• GPS tracking</li> <li>• No major issues</li> <li>• High rating</li> </ul>            | <ul style="list-style-type: none"> <li>• Full integration with web version</li> <li>• GPS tracking</li> <li>• Reports of instability and sync issues</li> <li>• High rating android / low on apple</li> </ul>                  | <ul style="list-style-type: none"> <li>• Little functionality through mobile app</li> <li>• Low rating and unstable</li> </ul>  |
| <b>Other</b>      | <ul style="list-style-type: none"> <li>• Signature acceptance</li> <li>• H&amp;S templates</li> <li>• Email function through addon</li> <li>• SMS through addon</li> </ul> | <ul style="list-style-type: none"> <li>• NZ certification for trades that require</li> <li>• Auto population of letters / emails from quoting / invoicing</li> <li>• SMS through addon</li> <li>• H&amp;S templates</li> </ul> | <ul style="list-style-type: none"> <li>• Mobile app has timer</li> <li>• Linking with Xero means both importing and exporting costs and payments made easy</li> </ul> |

Stand alone app / website.

Designed to track jobs from quoting to jobs to invoicing and assigning purchases orders, scheduling time and team members to specific jobs and populating reports based upon real data for productivity and profitability.

- Able to sync with both Xero and MYOB
- Can connect with Stripe
- Integrate enquiries from website or email into Tradify.
  - Website can be created through WordPress, WIX, Squarespace
- Google calendar integration

## Function

- Set multiple billing rates for hourly rate / billed in incremental periods / with rounding and minimum time spent available as options
- Template creator (documents and emails) for quotes, invoices, purchase orders, bills and job service reports
- Set up parts price list through suppliers, break into categories
  - Import price books from suppliers
  - Set multiple pricing levels, incl. markup
- Create a job (from quote), apply all specific purchases and time allocation, import supplier bills, populate an invoice
- Suppliers / Customers – import from Xero/File, export to file
  - Sites for customers – add multiple sites (contacts under a singular customer)
- Kits – collection (bundle) of materials, labour and misc. costs
  - i.e. typical recurrent services, used for quicker quotes and invoicing

## Jobs to Completion

- Set up quote with customer, pricing level, date expiry, line items (labour, materials, misc.)
- Accepted quote through to a new job / create new job
  - Import quote items into job
  - Add timesheet entries or time each job using app
  - Add price list items or misc. costs
  - Create invoice from time and materials from job / from quote
    - whole amount, percentage of quote, fixed or specific line items
    - Email invoice to client from app
    - Auto sent to Xero
  - Create purchase orders / bills and assign to individual jobs
    - Costs assigned to jobs are complete with markup
- Assign jobs in scheduler for specific days / hours
  - Assign specific staff to jobs. Once assigned, an alert is sent
- Create reports
  - Jobs – financial / customers / time periods
  - Productivity for staff
  - Timesheet for staff
- Jobs assigned a status for easy tracking

Mobile app has same functionality as website.



## Users

- Set multiple users
    - Set default billing rate per user
    - Notifications can be set for email or mobile app
    - User permissions can be set for access to usage of Tradify
- GPS tracking available through app with maps (as long as enabled by user)

## Usage

- Front page shows overview of jobs
  - For today and tomorrow and jobs assigned to the individual login person
  - Status of
    - Invoices
    - Quotes
    - Purchase Orders
    - Bills
- Easy menu for location of each area
- Reports for
  - Contract tracing
  - Job financials (over different time periods)
  - Job sheet (over different time periods)
  - Productivity (over different time periods)
  - Timesheets (over different time periods)

## Pricing

Staff members with login access

- \$39 per user per month

Staff member with no access

- \$9 per user per month
  - This user exists within the system but has no access to Tradify. All information, hours worked, material costs need to be entered in manually by a login access user

| Apple                           | Android             |
|---------------------------------|---------------------|
| Size = 135.9MB                  | Size = 53MB         |
| Languages =                     | Languages =         |
| Requires = iOS 11.0 or later    | Requires = 5.0+     |
| Star rating = 4.6 ★             | Star rating = 3.9 ★ |
| Reported known issues with app: |                     |

## Other

Health and Safety tasks and forms/templates for hazard and risk identification.

Can gain signature of customer on quote acceptance using app.

Update customer via email when job scheduling.

Easy SMS function through app – notify of running late, reminder, etc

Can produce a COVID tracing report

\$250 referral programme



| Pro  | Con  |
|--|--|
| <ul style="list-style-type: none"> <li>• All functions linked together for easy tracking of time, billing, invoicing throughout an entire job.</li> <li>• Creating multiple sites under one contact</li> <li>• Mobile app has same / similar functionality to website</li> </ul> | <ul style="list-style-type: none"> <li>• Only have forms and certificates for U.K.</li> <li>• Pay for users even with no access</li> </ul> |



Stand alone app / website

Track jobs from quoting to completion. Time and material allocation to jobs. Team member and calendar scheduling.

Job and financial summaries for each job gives insight into any variation made to the original plan, how often the site was accessed and why, profit margins, billable vs logged hours vs remaining hours quoted for, total labour and material costs. This is updated as the job progresses.

- Able to sync with both Xero and MYOB.
- Integration with accounts from 12 different suppliers – monthly price books, sending purchase orders
- Sync staff and jobs through Google calendar
- Text messaging through Fergus, text and reply, \$15 per 100 texts

## Function

- Uploading of photos and files applicable to each job.
- Certification for compliance and terms of trade can be provided through the addon.
- Each job can have a hazards list and tasks list identified and assigned
- Purchase orders directly assigned to each job.
- Import price books and assign tiered pricing to individual products
- Add favourites – groups of materials, labour and misc. costs for common tasks
- Groups – used for managing different teams within the organisation, i.e. roofers, plumbers, electricians, etc.
- Checklists – create a checklist template in Fergus to assign to jobs
- Customers
  - Import from Xero
  - View break down of jobs (recurring), invoicing, sites per customer
  - Access files and documents, emails
  - Produce customer report
  - When adding new
    - Terms
    - Ceiling rate
    - Discounts
    - Reminders
- Sites – view (in)active jobs
- Health and Safety
  - View meeting notes and minutes
  - Keep policy documentation on the app / MSDS
  - Upload H&S policy and set H&S officer
  - Record incidents
  - Hazard identification templates

## Jobs to Completion

- New Job



- Select customer or add new
  - Select site or add new
  - Add details
  - Approve
- Pre acceptance
  - set quote (line items)
  - assign staff and schedule
  - assign any purchase orders

This creates a letter in Fergus to email or send out.

- Once email out customer can accept / decline
- At Job
  - Assign visit time inclusive of unpaid
  - Assign purchase orders / suppliers
  - Assign material costs stock on hand
- Create invoice from quote at percentage, remainder or sections
  - Add additional costs
    - Any materials ordered / purchased
    - Labour
  - Set discounts + markup
  - Payment terms

Create and email out invoice. On approval, exports to Xero invoices.  
Fergus will ask if the job is complete

Mobile app has same functionality as website.

## Usage

- Front page shows overview of tasks
  - status of
    - jobs
    - scheduling
    - invoicing
    - payments
- Easy menus to locate majority of information
- Large reporting options for
  - Business
  - Invoicing
  - Quoting
  - Staff
  - Jobs

## Users

- Set multiple user
  - Set both standard pay and charge out rates
  - User permissions set dependant on user level



## Pricing

### Free

A simplified version with no commitment

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**Basic Plan with limitations**

- ✓ Unlimited users
- ✓ 10 Jobs per month
- ✓ 3 Invoices per month
- ✓ See last 14 Days of Notes & History
- ✓ Accounting Software Integration (excl. supplier docs)

After your Free Trial, your account will default to the Free plan.

**\$0 NZD**

### Professional

Get in-depth insights into your business

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**A fully-fledged trade toolkit, with:**

- ✓ All Basic Plan Features
- + GPS Tracking
- + Files & Photos
- + Tasks
- + Tiered Pricing
- + Purchase Orders
- + Health & Safety
- + Business Reporting
- + Checklists

**\$60** Monthly per Full User (1 Required)

**\$15** Monthly per Timesheet User

**\$3.50** Daily per Contractor User

**\$60 NZD**

### Basic

Reduce admin time and double handling

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**Including:**

- ✓ Timesheets
- ✓ Calendar
- ✓ Quoting & Estimating
- ✓ Supplier Integrations
- ✓ Invoicing
- ✓ Job Reporting
- ✓ Notice Board
- ✓ Notes & Conversations

**\$40** Monthly per Full User (1 Required)

**\$15** Monthly per Timesheet User

**\$3.50** Daily per Contractor User

**\$40 NZD**

Your monthly bill, excl. GST

| Apple   | Android   |
|---|---|
| Size = 15.4MB<br>Languages = English<br>Requires = 11.0 or later<br>Star rating = 2.8★                                      | Size = 7.4MB<br>Languages = 4.4<br>Requires =<br>Star rating = 4.1★ |
| Reported known issues with app:<br>App is unstable and will crash or freeze, time keeping function is buggy, syncing issues |   |

## Other

| Pro   | Con  |
|---|--|
| <ul style="list-style-type: none"> <li>• Large reporting section</li> <li>• Supplier / google integration</li> <li>• Front page gives detail at a glance</li> </ul> | <ul style="list-style-type: none"> <li>• Not intuitive to use</li> </ul> |





Stand alone app / website (designed like Xero interface)

Accessible through Xero menu – sync with chart of accounts

Designed for tracking jobs from leads, quotes / estimates to invoicing and purchase orders, recording of time spent per job, and populating reports for either WIP / complete jobs or creating own custom report for the details specified.

- Syncs with Xero / MYOB and 30 other apps to increase functionality
  - [WorkflowMax Add Ons](#)
- Payments made and recorded in Xero can be imported back to WorkflowMax
- Document syncing with box, dropbox, google drive, suitefiles
- Calendar integration through iCalendar

Tasks – labour portion of the job

Costs – material portion of the job

## Function

- Set defaults for Jobs (state of, categories), invoice / purchasing timing of payment (for templates), leads and estimates / quotes
- Set or define tasks
  - Billing base and billable rates
  - what GL account codes to be used from Xero

Each of these task settings can be further defined via customs client, staff and historic rates.

- Set custom fields for reports, templates for jobs / invoices / quotes
- Notifications through email or RSS feeds for selected people for selected tasks.
- Suppliers – import from \*.csv or \*.txt
  - Costs are entered manually
- Customer – links with Xero
- See WIP jobs

## Jobs to Completion

- Create a lead to start tracking potential jobs
  - If job is WON, create a job from lead
- Create quotes or estimates to send out to customers
  - Select or add tasks, costs and other additions to the quote estimate
  - Set
    - Units – time + billable rate
    - Costs – Quantity + price
    - Any additional charges
  - Save / Print / Issue
- Once client accepts – click accepted, revise if necessary or decline
- Job is created
  - Set client / contact, schedule for completion / what staff are assigned.
  - Once job is started, any time working on the job can be tracked or recorded with the mobile app. A timer can be used in app to track all working time which auto uploads to assigned job
- Create invoice – progressive or final



- Add timesheet information
- Assign costs / purchases

Mobile app has similar functionality to website. However, some functions either need to be started on website and carried on through mobile app, or are substantially easier to create then use mobile app.

## Users

- Set multiple users
  - Base rate and billing rate per staff member
  - Set user access permissions
- Can set different user to different teams (builder, plumbers, etc)

## Usage

Front page shows fortnightly calendar with assigned jobs for each day.

- Jobs are the broken down into
  - Today's jobs – job / client / status
  - Weekly Schedule – job / client / status
- Easy link to enter time / costs and assign to jobs
- Create new jobs

Menus for

- Clients
- Jobs – modification, scheduling, tasks
- Business – leads/quotes, invoicing/purchases, suppliers, time sheets, settings
- Reports – fairly comprehensive reporting for
  - Invoice analysis
  - Performance
  - Time
  - WIP
  - Custom reports can be created

## Pricing

Pricing is variable dependent on users. <https://www.workflowmax.com/pricing>

From \$30 for a singular user to \$350 for 100 users.

Over 100 users are priced at \$5 per additional user.

| Apple   |                   | Android       |       |
|---|-------------------|---------------|-------|
| Size =  | 34.8MB            | Size =        | 4.8MB |
| Languages =   | English           | Languages =   |       |
| Requires =  | iOS 12.0 or later | Requires =    | 5.0+  |
| Star rating =   | 2.7 ★             | Star rating = | 2.1 ★ |
| Reported known issues with app:<br>Little / limited functionality, poor integration with web version, crashes |                   |               |       |



## Other

Timer on mobile app for timing when working on jobs.

Little additional functionality is available through either the web version or mobile app.

| Pro   | Con  |
|---|--|
| <ul style="list-style-type: none"><li>• Easily links with Xero –suppliers / clients / invoicing / purchasing</li><li>• Payments can be imported from Xero to Workflowmax</li><li>• Low cost structure</li></ul> | <ul style="list-style-type: none"><li>• Limited functionality for website</li><li>• Mobile functionality is severely lacking</li></ul> |

