

# Head Contractor Training Notes



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## 1. Logging in

Go to the website home page at [www.mycontractor.com.au](http://www.mycontractor.com.au) and enter your user name and password in the appropriate boxes in the top left of the page (point 1).



You Are Not Logged In

Welcome!  

**mycontractor.com.au** is the first online solution helping contractors and clients share information vital to day-to-day contract and service needs.

**If you use contractors**

Stay in control with **mycontractor.com.au**

**mycontractor.com.au** allows you to design a personalised **Contractor Watchlist** of your contractors. Your watchlist will automatically advise you of any expired contractor insurance certificates or licences, ensuring that you are always kept informed.

**mycontractor.com.au** gives you the flexibility to comfortably search for contractors by service type or location in the knowledge that you are only dealing with professional contractors who meet your specific requirements and appreciate the importance of keeping documentation up to date.

**If you're a contractor**

Save time and access quality leads with **mycontractor.com.au**

At **mycontractor.com.au** you have the freedom to centrally store all your current insurance details, OH&S policies, licenses, memberships, company profiles and the locations you service.

You simply upload everything once and by keeping it up to date, you no longer need to waste time reissuing required documents to all of your clients. With email reminders that automatically notify you when insurances are up for renewal, you will never get caught out again.

And now, if you join **mycontractor.com.au** you can access all our lead generation programs. Contact us at [admin@mycontractor.com.au](mailto:admin@mycontractor.com.au) for more information.

Created by [admin](#)  
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**FREE 30 DAY TRIAL**

Click here to sign up.

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Log in

New contractor membership?

Name  
admin

Password

Log In

Forgot your password?

Menu

- Home
- About Us
- FAQ
- Terms of Use
- Contact Us

## 2. Setting up your Watchlist

In order to set up your watchlist, click on the “watchlist” tab on the top row of the page.

### To edit your Watchlist

When on the Watchlist page, click the “Edit Watchlist” button located towards the top left of the page (under the ‘Watchlist Report’ title).

#### A. Editing your Insurance Requirements

This is where you input the minimum insurance requirements that you need your contractors to meet. To do this, start by highlighting the insurance type by clicking on the box on the left (1) and making a selection from the drop down list. Once the insurance type required is selected, input the dollar value of the coverage you require into the box on the right (2).

Repeat the same steps for each of the insurance types required, inputting a dollar value for each.

#### B. Editing your Contractor List (subscriptions)

Next you must tell the system which contractors you want it to watch and compare against the insurance requirements you have set in point A above. To do this, simply click on the boxes under the “Subscriptions” heading and individually highlight the required contractors from the drop down list.

This list can be as long as you like, just keep repeating the process listed above.

#### C. Sub contractor aliases

You also have the ability to give each subcontractor an alias. The alias may be a reference code that you use in other reporting or accounting systems. This feature allows you to more easily merge or compare records with other reporting or accounting tools. To do this, simply enter into the “alias” box on the right, the code that you wish to use for that contractor.

The screenshot shows a web interface for editing a client's watchlist. At the top, there are navigation tabs: Contents, Watchlist, Email, Profile, Contractor Search, and Edit. Below the tabs is a header area with 'Edit Client' and '[default] [watchlist]'. The main content is divided into two sections: 'Insurance Requirements' and 'Subscriptions'. In the 'Insurance Requirements' section, there are two rows. The first row has a dropdown menu labeled 'Workers Compensation' (marked with a red '1') and a text input field containing '0' (marked with a red '2'). The 'Subscriptions' section has a table with two columns: 'Contractor' and 'Alias'. The 'Contractor' column has dropdown menus with values 'Wheeler Industries Pty Ltd', 'Peter Brakenridge Plumbing', 'spinners1', and 'Test Contractor One'. The 'Alias' column has text input fields with values 'tms', 'pbp', and 'spin'. At the bottom, there are three buttons: 'Previous', 'Save', and 'Cancel'.

### **3. Monitoring your Watchlist**

Your Watchlist shows you the immediate status of each of your contractors in an easy to read table. Using a traffic light style warning system, you can differentiate between contractors who are:

**GREEN**

*Have Workers Comp, Workers Liability, Comprehensive car or Professional Indemnity insurance totally up to date*

**AMBER**

*Have one or more of the above insurances coming up for renewal*

**RED**

*Have one or more of the above insurances expired*

One month prior to the expiry of a contractor's licence, the contractor will display as amber on your Watchlist and mycontractor.com.au will automatically send you a warning email. If the documentation is not updated, you will be notified again via email on the date of expiry.

### 3. Sending Emails

To send emails via [mycontractor.com.au](http://mycontractor.com.au), simply click on the “Email” tab at the top of the page. This system allows you to simply send emails to one or more of the contractors on your Watchlist.

To do this:

1. Fill in the subject box at the top of the page.
2. Input your message into the subject field. This can be typed in, or it can be cut and pasted from another program such as Microsoft “Word”
3. Identify the recipients by highlighting them in the list on the left and then clicking the “Add” button (To send an email to your entire watchlist, you can use the “Add All” button).
4. Mistakes can be undone by again highlighting the name you want removed and clicking the “Remove Button”
5. If you wish to add a name that is not on the list, simply enter the email address into the “New Value” box then click the “Add New” button to the left.
6. When the list is complete, and the email is ready to send, click on the send button at the bottom of the page.

The screenshot shows a web interface for sending emails to contractors. At the top, there are navigation tabs: Contents, Watchlist, Email, Profile, Contractor Search, and Edit. An 'Add New Item' dropdown is on the right. The main heading is 'Write an email to contractors', followed by the instruction: 'This form allows you to send emails to one or more contractors on your watchlist.'

The form contains the following sections:

- Subject:** A text input field with the label 'The subject line of the email.' (Annotated with a red '1').
- Message (Required):** A large text area with the label 'The message text.' (Annotated with a red '2').
- Recipients (Required):** A section for selecting recipients, labeled 'The recipients of this message.'
  - Available:** A list of contractor names: Peter Brakenridge Plumbing, Test Contractor One, and Triple 'M' Mechanical Services Pty Ltd. (Annotated with a red '3').
  - Buttons:** 'Add All »', 'Add →', and '← Remove' (Annotated with a red '4').
  - Selected:** An empty list box.
  - New value:** A text input field for adding new recipients, with an 'Add New ↑' button next to it. (Annotated with a red '5').
- Send/Cancel:** Two buttons at the bottom of the form. (Annotated with a red '6').



## 5. Contractor Search

Should you require the services of another sub contractor, you can quickly search the database of trades people to find the contractors who meet your requirements.

- 1 Click on the "Contractor Search" tab at the top of the page.
- 2a If you know the name of the company that you are searching, input the name into the box and click "Search".
- 2b If you do not know the name, yet have the company's ABN, simply enter it into the appropriate box and click "Search".
- 2c If you are not looking for a specific company yet require the services of a specific trade, you can refine the search by ticking the type of trade you require in the top list, and their location in the bottom list. You will then be presented with a range of sub contractors who meet your specifications.

Once the list of sub contractors is finalised, you can review each one's details to ensure their insurances etc meet your requirements.

**1**

Contents Watchlist Email Profile **Contractor Search** Edit Add New Item ▾

### Contractor search

This search form enables you to find contractors registered with this site by specifying one or more search criteria.

**Search Terms**

**2a** **Company Name**  
Return items matching this company name.

**2b** **ABN**  
Return items matching this Australian Business Number.

**2c** **Services**  
You may search for contractors based on the services they provide. If you wish to do so, select them from this list.

- Select All/None
- Accounting Services
- Advertising Services
- Agricultural Land Clearing and Fencing Services
- Agriculture
- Air Conditioning and Heating Services

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**Locations**  
You may search for contractors based on the locations they operate in. If you wish to do so, select them from this list.

- Select All/None
- NSW Metro
- NSW Regional
- NT Metro
- NT Regional
- Qld Metro
- Qld Regional
- SA Metro
- SA Regional
- Tas Metro
- Tas Regional
- Vic Metro
- Vic Regional
- WA Metro
- WA Regional

**Contractors registered since**  
Limit results to contractors who have registered since you were last logged on, the last week, etc.

Ever ▾

## 5. Requesting Quotes

You also have the option to request quotes from contractors. The system enables you to send quote requests to the [mycontractor.com.au](http://mycontractor.com.au) contractors, as well as other contractors not currently on the system.

To do this:

- 1 Click on the “Add new item” tab at the top of the page and select the “Quote” option.

Contents Watchlist Edit Properties Email Profile Contractor Search Quotes & Importers

**Your changes have been saved.**

Add New Item  
Importer  
Quote **1**

### Watchlist Report

Edit Watchlist Export To CSV

#### 66% Compliance

Status	Company Name	ABN	Messages
●	Trial Builder Pty Ltd	82001002006	
●	Trial Locksmith Pty Ltd	82001002007	● Expired Workers Compensation insurance
●	Trial Plumber Pty Ltd	82001002004	

You will be taken to the Quote section of the website, see following page.

# Quoting – Screen 1

- 2 Then fill out the following form as per the instructions under each heading.
- 3 You might have a detailed job specification file, which you can upload for the contractors to view. To do this, click the 'Replace with new file' and enter the location on your computer where the file can be found. If you are not sure, click the 'Browse...' button (indicated above) to find the location. When you have stored the file, highlight it and click the save button.
- 4 Once you have filled in all the job details, click 'save'.

View Edit Send Quote Add New Item State: Private

**Quote has been created.**

### Edit Quote

Quote

**Project Name** (Required)  
Enter a short name for the project. This name will be included on the outgoing quote email.

2

**Description of Job**  
Enter a short description of the job to be quoted on. This will be included in outgoing quote emails. If you need more detail, use the specification file below.

**Required Service Type** (Required)  
Select a MyContractor Service type to automatically match contractors from our database, or 'Not Specified' to specify the recipients yourself.

**Budget Range** (Required)  
Unknown

**Job Location** (Required)  
Enter the location at which the job is to be carried out.

**Specification File**  
You can optionally upload a file of any type which specifies the job in greater detail.

3  Keep existing file  
 Delete current file  
 Replace with new file:

**Contact Name** (Required)

**Contact Phone**

**Contact Fax Number**

**Contact Email**

**Quote Due Date**  
Use this field to specify the date by which you would like to receive all quotes.  
---- / ---- / ---- : ---- : ----

**Job Completion Date**  
Use this field to specify the date by which the quoted work must be finished.  
---- / ---- / ---- : ---- : ----

4

Created by fred4  
Last modified 13 November 2007 06:42 PM

## Quoting – Screen 2

You will then be taken to the second quoting screen, where you can check to make sure all the job details are correct. If a change needs to be made, click the 'edit' (1) button along the top. If the job details are correct, click 'send quote' (2).

1      2

View   Edit   Send Quote

Add New Item   State: Private

**Your changes have been saved.**

### New Car Port

**Description of Job:**  
Please build me a new, free standing carport, using the most environmentally friendly materials

**Required Service Type:**  
Residential Building Construction

**Budget Range:**  
\$10,000-\$14,999

**Job Location:**  
555 Example Street Example Suburb, Example State

**Specification File:**

**Contact Name:**  
Mycontractor Example

**Contact Phone:**  
02 9552 6617

**Contact Fax Number:**  
02 9552 6431

**Contact Email:**  
atomkins@mycontractor.com.au

**Quote Due Date:**  
22 June 2008 04:00 AM

**Job Completion Date:**  
27 September 2008 04:00 AM

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Last modified 13 November 2007 06:47 PM

## Quoting – Screen 3

If you selected the 'send quote' option, you will be taken to the third quoting screen.

The contractors who appear under "Send quote to contractors" are the contractors on the [mycontractor.com.au](http://mycontractor.com.au) database who perform the services you selected under 'Required Service Type' on [screen 1](#). You can also send your quote request to other contractors by entering their email addresses in the 'Other Recipients' box – enter only one email address per line.

Then click 'Send' to email out your quote request.

View   Edit   Send Quote

Add New Item   State: Private

### New Car Port

**Send quote to contractors**

- John Smith <atomkins@mycontractor.com.au>

**Other recipients (one per line)**

1

2

Send

# Contract Monitoring

The contract monitoring feature allows head contractors to monitor the status of the contracts you have in place.

The function allows you to upload copies of contracts, assign management responsibilities and set reminders so you can avoid being caught out by an expired contract.

## Step 1.

On your main watchlist page, click on the button on the top right corner titled “Add New Item”

- Click once and a drop down menu will appear.
- Click on “Contract”
- You will then be taken to the next page



Contents Watchlist Edit Properties Email Profile Contractor Search Quotes & Importers

Admin My Preferences Profile

Add New Item  
Contract  
Importer  
Quote

Welcome! You are now logged in.

### Watchlist Report

Edit Watchlist Export To CSV

### Contractors

#### 3% Compliance

Status	Company Name	ABN	Messages
●	AJM Window Installations Pty Ltd	77100419887	● Insurance does not meet your requirements
●	Adette Services Pty Ltd	81348478199	● Expired Car Insurance insurance (2007/02/14) ● Expired Public Liability insurance (2007/07/12) ● Expired Professional Indemnity insurance (2007/07/12) ● Expired Workers Compensation insurance (2007/07/10)
●	Aercon Systems & Beaver Air Conditioning Service Pty Ltd	36791396198	● Insurance does not meet your requirements ● Expired Workers Compensation insurance (2005/10/30) ● Expired Public Liability insurance (2006/06/30)
●	Allstaff Air Conditioning (Vic) Pty Ltd	41091432307	● Insurance does not meet your requirements ● Expired Public Liability insurance (2007/09/30)
●	Asset Industries Australia Pty Ltd	97112795552	● Insurance does not meet your requirements ● Expired Public Liability insurance (2007/06/27) ● Expired Workers Compensation insurance (2007/06/30)
●	Augusta Locksmiths	46816810604	● Insurance does not meet your requirements
●	BJ & LI HIRTH PTY LTD	19789207119	● Insurance does not meet your requirements ● Expired Public Liability insurance (2006/09/15)
●	David Power Pty Ltd	97003921373	● Expired Workers Compensation insurance (2005/12/17) ● Expired Public Liability insurance (2006/03/31) ● Expired Professional Indemnity insurance (2006/03/31) ● Expired Car Insurance insurance (2006/03/31)
●	Electric Fire p/l T/A Mick Radatti Electrical	75533297174	● Insurance does not meet your requirements ● Expired Workers Compensation insurance (2007/11/17) ● Expired Public Liability insurance (2007/09/01)
●	Grosvenor Air Conditioning & Mechanical Services	12003608795	
●	Heritage Pest Control	17099862361	● Insurance does not meet your requirements ● Expired Public Liability insurance (2006/09/01)

# Contract Monitoring

## Step 2. Data Input page.

On this page you will input all of the information relating to the contract you wish to monitor.

1. Enter the contract name for easy reference.
2. Enter the person in your organisation that is responsible for the management of that contract.
3. Enter the date and time that the contract expires.
4. Enter the date when you want to be notified prior to the contracts expiry date. For example, large and complicated contracts may require many months to relet. In these cases look at setting the date 3 to 4 months prior to the contract expiry date. Simpler contracts may only require a couple of weeks forewarning.
5. Enter the email address in your organisation where the reminder email is to be sent.
6. Enter the company that holds the contract currently
7. Then you can upload a copy of the contract into the system for future reference. Simply check the button "Replace with new file" and then choose the file from where it is stored on your system.
8. Click save.

You can repeat this process for as many contacts that you wish to monitor.

**Contract has been created.**

### Edit Contract

Contract

**Contract Name** (Required)  
Enter a short name for the contract. This name will be included on the notification email.

**Contract Owner**

**Expiry\_date** (Required)  
2008 / / : :

**Notification\_date** (Required)  
2008 / / : :

**Notification Email Address** (Required)

**Current Contract Holder**

**Contract File**  
You can optionally upload a file containing the contract document.

Keep existing file  
 Delete current file  
 Replace with new file:

Choose File No file chosen

Created by admin  
Last modified 30 September 2008 12:48 AM

**1** Contract Name  
**2** Contract Owner  
**3** Expiry\_date  
**4** Notification\_date  
**5** Notification Email Address  
**6** Current Contract Holder  
**7** Contract File  
**8** Save/Cancel buttons

**We hope these training notes help you make the most of mycontractor.com.au**

For more information or to discuss additional needs, please contact Pia Vogel.

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