

# Partners in Compliance

## Managers Guide to the Web

### Overview

The Ebix Trades Monitor website permits:

- Checking the full list of contractors
- Quick search by name, compliance code, trade, suburb or state
- Add contractors for quick compliance checks
- Easy to use query function

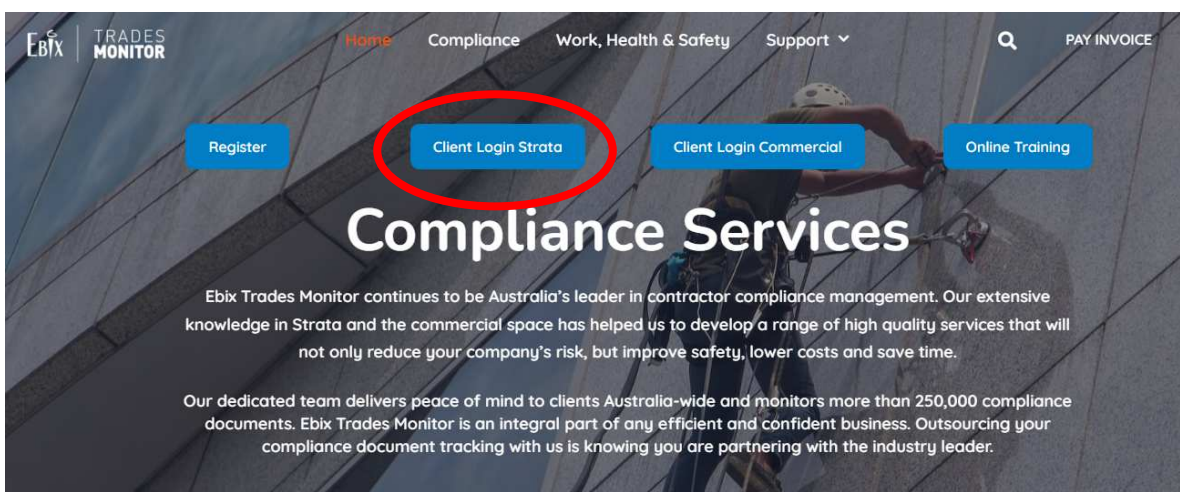
Importantly, it permits 24/7 access for clients to export their creditor file for import into their compatible application.

The system is secure and can only be accessed by using assigned client identification and password.

- The information accessed through the application is restricted to contractors/creditors linked to the assigned ClientID only

### How to access the website

Browse for Ebix Trades Monitor. ([www.tradesmonitor.com.au](http://www.tradesmonitor.com.au)) Save it to “Favourites” for future, quicker access.



Click Client Login Strata:



Select the "this is a private computer" option, enter the details provided for Login1 and click on "Log On":

A login form with a white background and a yellow gradient footer. At the top left is a radio button icon with a red circle around it. To its right are two radio button options: "This is a public or shared computer" (unselected) and "This is a private computer" (selected). Below these are two yellow input fields labeled "Username:" and "Password:". A "Log On" button is positioned to the right of the password field. At the bottom left, it says "Secured by KEMP LoadMaster" and "© 2002-2016 KEMP Technologies Inc. All rights reserved." A KEMP logo is in the bottom right corner.

On successful login, this opens an additional login page. Enter the details provided for Login2 and click on "Submit":

A light blue form titled "Client Login" in red. It contains two white input fields labeled "Client ID" and "Password". Below them is a blue "Submit" button. At the bottom, it says "For a demonstration login using ID 12 Password demo" and has three links: "Privacy Policy", "Client Terms of Use", and "Report Errors".

The Landing Page is the general Search screen

Trade:

OK Code:

Name:  Your Ref:

Suburb:

State:

Sort by:  Name  Trade  OK Code

Show the Latest Changes for  days

For an overview of the entire database, just click on Submit Search on the bottom right.

Search a contractor by Trade, OK Code (i.e. compliant or non-compliant), Name, Your Reference, Suburb or State. Choose the Sort by method and then Submit Search.

When the list of contractors is displayed click "Details" to view an individual contractor

	OK OHS	Your Ref	Name	Trades Monitor Comments
<a href="#">Details</a>	Y		1 Stop Gutter Protection	
<a href="#">Details</a>	N		ABD Electrics Pty Ltd	29/11/22 Reg emailed
<a href="#">Details</a>	Y		Able Glass Pty Ltd	
<a href="#">Details</a>	Y		Access Hardware Pty Ltd (vic)	
<a href="#">Details</a>	Y	N	ACS Door Services Pty Ltd	Approved for door maintenance/repair. Not approved for Security/electronic gate servicing.
<a href="#">Details</a>	Y	N	Active Fire Fix Pty Ltd	
<a href="#">Details</a>	Y		Advanced Living Solutions	ABN:Hybrid Trust
<a href="#">Details</a>	Y		AGG Doors	07/07/2017 SERVICING ONLY Not Licenced for Electrical work
<a href="#">Details</a>	Y		All Purpose Pumps Pty Ltd	Servicing Only : 'not licenced for electrical work'

To view scanned documents, click "Select Scan from List Below."

**Trades Monitor**

Updates Search Add Contractor Managers Results **Details** Logout

To return to results list, click Results button above.

**Contractor Details**

Contractor ID 37469 Your Ref 12103 943660

Contact Address Phone Fax e-Mail Mob

ABN Entity ABN 69 698 943 660 ABN Yes : GST Yes

THE TRUSTEE FOR DAWSON FAMILY TRUST

Trading Type Trust

Trade : Swimming Pool Repair/Construction

**Message to Trades Monitor**

Please send an email to [tminfo@ebix.com.au](mailto:tminfo@ebix.com.au)

Ok Code Status **Y** Approved

OH & S Evaluation **N** Not Approved

Class Subject to Ok Code Status

Trades Monitor Comments

ABN=Trust 07/04/22 - Wages total blacked out on WC.

**3 Scanned Documents**

Year-Scan Document Content

Select Scan From List Below

Description	Expiry	Status	PolicyNo	Comments
Public Liability	30/11/2023		9685250CMB	S20M
Workers Compensation	31/03/2024		127672101	
Licence - Company - Swimming Pool Repairs & Service	24/06/2023		148240C	
Licence - Individual - Swimming Pool Repairs and Service	14/05/2027		281906C	
Licence - Individual -	29/05/2027		149125C	
OHS Trades Monitor accredited	18/05/2017	Not Current		

Documents are currently filed as jpg's, single file (one image per page)

## ADD CONTRACTOR

This function permits quick action by Ebix Trades Monitor on a new contractor. Click Add Contractor and complete as much information about the contractor in the fields provided. If required rapid action type a note in the Message (Optional) field. Click Submit. Ebix Trades Monitor will confirm receipt by email and commence action immediately.

**Trades Monitor**

Updates Search **Add Contractor** Managers Logout

**Client Details**

macfarlane

Contractor Usage Permanent

Priority (Urgent/Week etc)

Your Name \*

Your email \*

**Contractor Details**

Trading Name \*

Contact Name Your Ref

Trade \*

Street Phone \*

Suburb Mobile

State \* Post Code Fax

ABN \*

Licence Number(s)

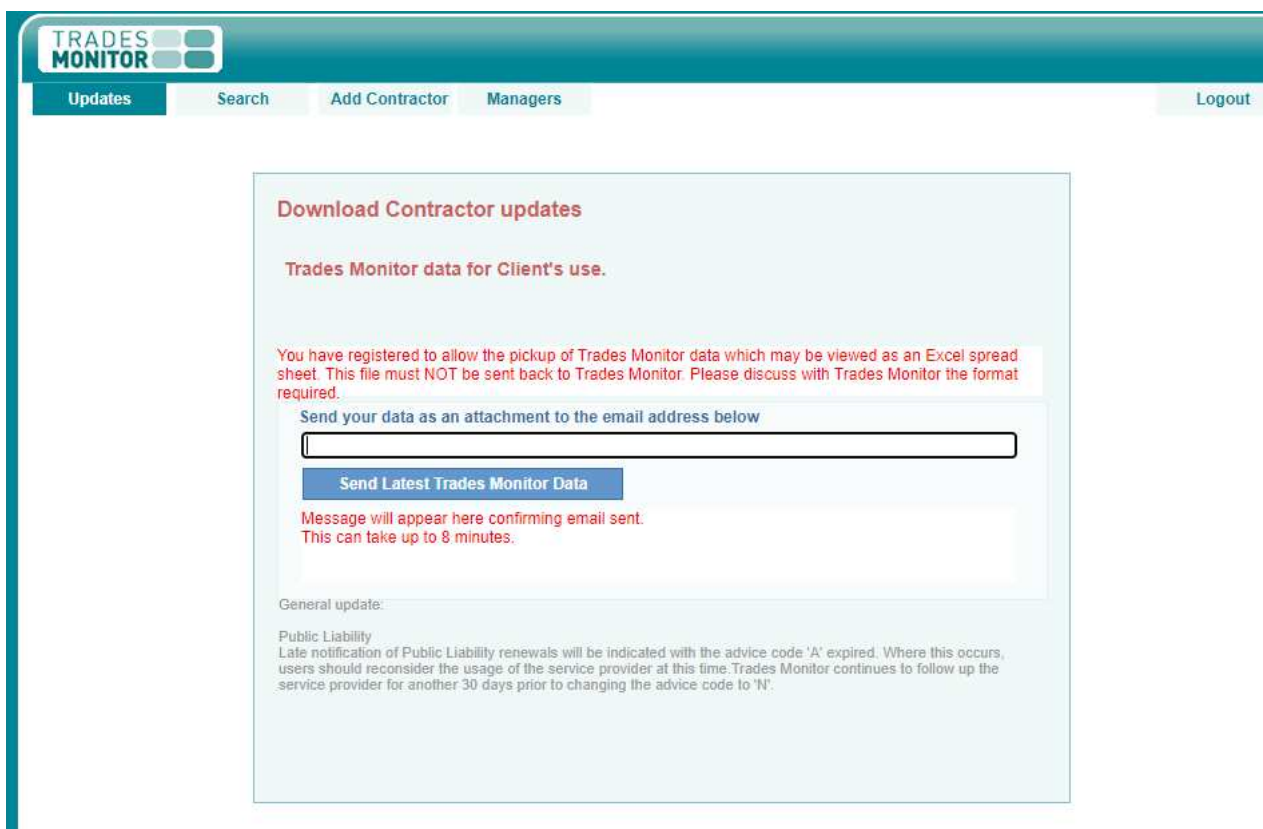
e-Mail \*

Message (Optional)

Clear Submit \* recommended Fields

## UPDATES

Clients can import their file into their software daily using the “Updates” function. Ebix Trades Monitor updates hundreds of contractor’s details every day. Its system is backed up every night. Click **Send Latest Trades Monitor Data**, wait for the message to confirm email sent and check your email. Import file into STRATA Master, STRATA Max, Property IQ or any other software that is set up for file exchange with Ebix Trades Monitor system.



The screenshot shows the Trades Monitor web application interface. At the top, there is a teal header with the 'TRADES MONITOR' logo on the left and navigation links for 'Updates', 'Search', 'Add Contractor', 'Managers', and 'Logout' on the right. The 'Updates' link is highlighted. The main content area is titled 'Download Contractor updates' and contains the following text:

**Trades Monitor data for Client's use.**

You have registered to allow the pickup of Trades Monitor data which may be viewed as an Excel spread sheet. This file must NOT be sent back to Trades Monitor. Please discuss with Trades Monitor the format required.

Send your data as an attachment to the email address below

[Send Latest Trades Monitor Data](#)

Message will appear here confirming email sent.  
This can take up to 8 minutes.

General update:

Public Liability  
Late notification of Public Liability renewals will be indicated with the advice code 'A' expired. Where this occurs, users should reconsider the usage of the service provider at this time. Trades Monitor continues to follow up the service provider for another 30 days prior to changing the advice code to 'N'.

## CONTRACTOR STATUS CODES

The Ebix Trades Monitor system progressively assigns compliance codes to contractors based on scheduled expiry dates and post expiry dates.

### Fixed Codes

- Y Approved
- N Not approved
- R\* Restricted (generally where the contractor is not licensed or the license is expired)

### Transitional Codes

- V Verifying (in pursuit of new contractor)
- A Alert (generally when insurance or specialist license has not been renewed or confirmed)

### Information Codes

- Q Query (client to supply more details about the contractor e.g. telephone, email or address)
- W Owner (not monitored)
- X Not considered a contractor (accountant, lawyer, utility or Government entity)
- Z Not monitored (has not been used for over 18 months)
- D Deleted (via a direct request from the client or contractor)

### Special Code

- G Approved** (by the client under special circumstances)
- R\* Restricted** (generally where the contractor is not licensed, or the license has expired).

NSW: Residential - restricted to work up to \$5,000 (including labour material and GST)

QLD: Restricted to work up to \$3,300 (including labour material and GST)

Vic: Restricted to work up to \$5,000 (including labour material and GST)

ACT: Restricted to work not requiring building approval

SA: If no trades licence, tradespersons cannot work

WA: Restricted to work up to \$20,000 (including labour material and GST) or \$1,000 for painting

**Ebix contact details;**

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