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) Save it to "Favourites" for future, quicker access.
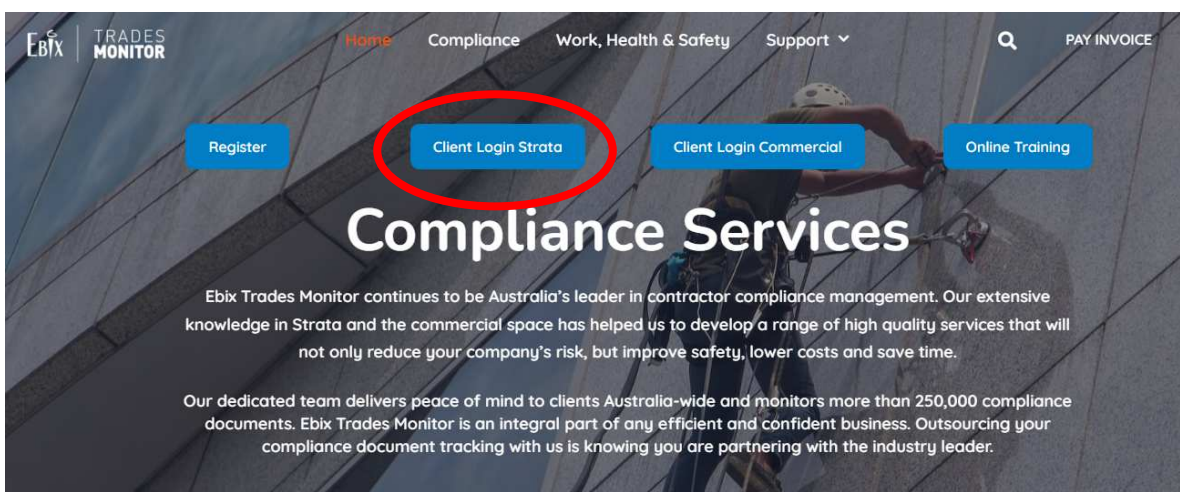
Click Client Login Strata:

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

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

The Landing Page is the general Search screen

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

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

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.
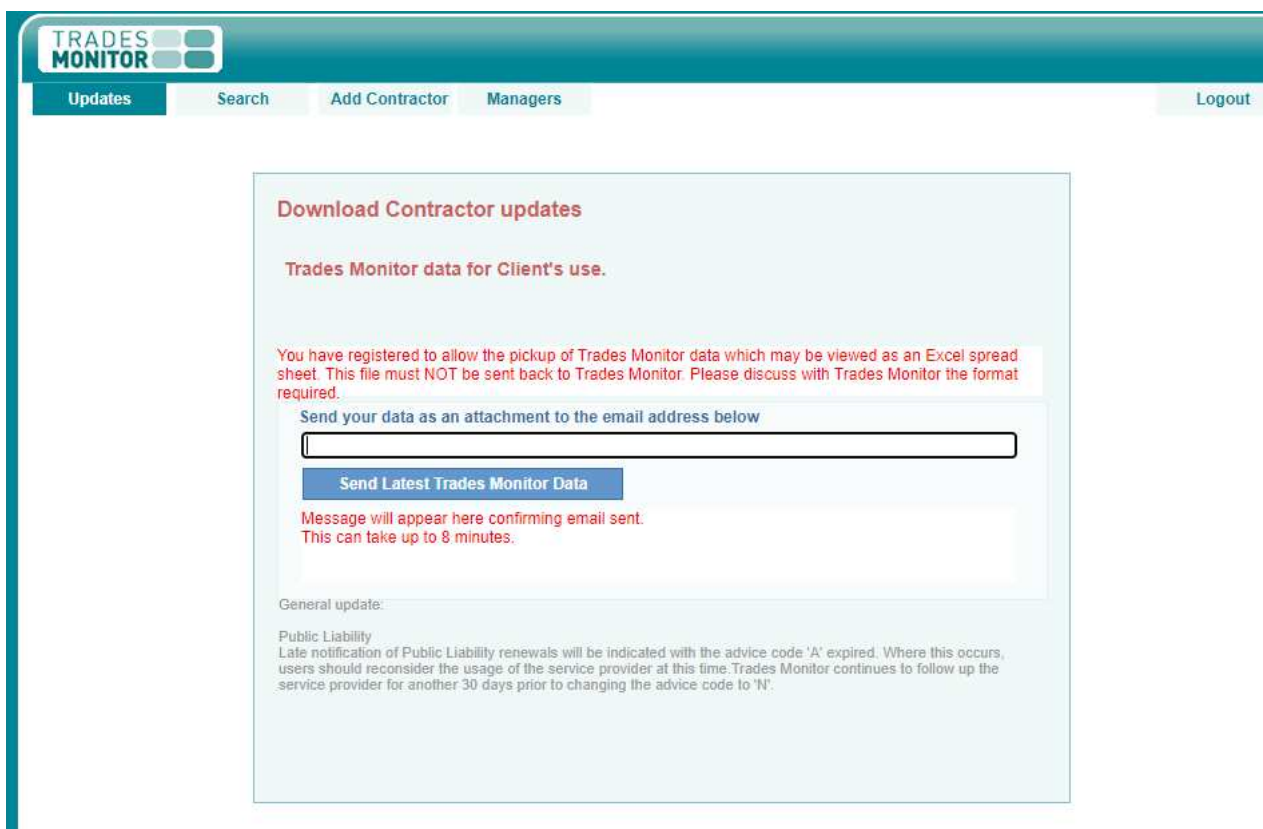
UPDATES

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 into STRATA Master, STRATA Max, Property IQ or any other software that is set up for file exchange with Ebix Trades Monitor system.

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 <u>not</u> 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 <u>not</u> 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 <u>not</u> 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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