

Your Trades kit

Job requests answered, quotes with the right VAT, work orders and review requests, all drafted for your OK. You do the job, your team does the paperwork.



TIME

10 minutes

FOR

Painters, plumbers,
electricians, carpenters,
gardeners and installers

VERSION

v1.0

Your Trades kit

01 Your kit team

These three join Michael and the Basics team when you click **Add 3 team members** on the **Trades team** card in **Settings → General**.

02 What this kit does

Everything below lands as a draft. You read it, change what you want, and send it yourself.

03 Connect first

04 Your first week

Day 1 is the same for every kit: fill in your business profile with Michael. Then, one request a day.

05 Good to know

■ BEFORE YOU START

- ☐ Locally set up with the Basics team (guide 01)
- ☐ Support mailbox connected (guide 03)
- ☐ Optional, Moneybird or Stripe connected for quotes and invoices (guide 03)

Your kit team

These three join Michael and the Basics team when you click **Add 3 team members** on the **Trades team** card in **Settings → General**.



Bram JOB INTAKE

Reads new job requests, asks the customer for what is missing (photos, address, m², build year), keeps your agenda file and drafts confirmations and day-before reminders.



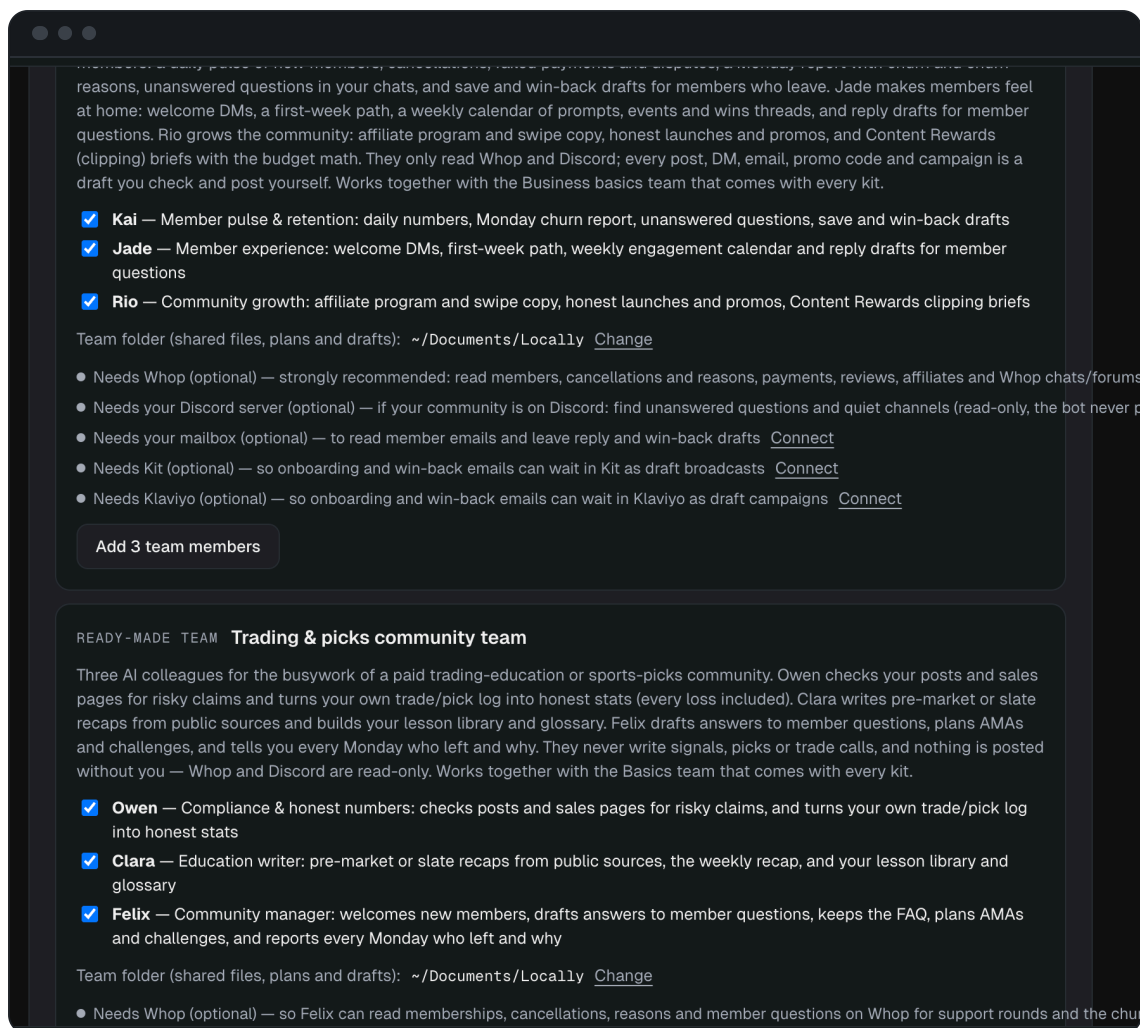
Joost QUOTES AND WORK ORDERS

Calculates quotes with the right VAT split (9% or 21%), turns your job notes into work orders and draft invoices, and follows up quotes that got no reply.



Lotte LOCAL MARKETING

Turns finished jobs into review requests and before/after posts, keeps a seasonal campaign calendar and collects proof for local service pages.



Settings → General: your kit card. Untick anyone you do not need yet, then Add 3 team members.

02

What this kit does

Everything below lands as a draft. You read it, change what you want, and send it yourself.

- **Job requests answered.** Bram goes through new job mail three times a day and leaves a reply draft that asks only for what is missing, or proposes a viewing. Urgent jobs (leak, no heating, power out, gas smell, storm damage) go to the top of his report.
- **A morning briefing.** Each morning Bram sends you a short overview of the day: appointments, open requests and what needs your answer. Three to five lines, nothing more.
- **Quotes with the right VAT.** Joost separates labour and material, adds provisional sums for unknowns and applies 9% or 21%. Where the rule is unclear he writes "VAT: check" and asks you.

- **Work orders and invoice lines.** Type or dictate your notes after a job. Joost turns them into a work order, a handover report for bigger jobs, and invoice lines as drafts.
- **Quote follow-ups.** A quote with no answer after 7 days gets one friendly follow-up draft. No pressure, no discounts.
- **Review requests and before/after posts.** After a job is done, Lotte asks which customers may get a review request, then drafts personal mails and post suggestions. Only with the customer's permission, and with nothing that identifies the address.
- **Seasonal campaigns.** Lotte keeps a calendar (gutters and boiler service in autumn, outdoor painting booked in winter, garden work in spring) and prepares campaigns four to six weeks ahead as drafts.

IMPORTANT

Everything is a draft. The kit never mails a customer, never books a slot and never sends a quote or invoice on its own. Only you confirm a date or a price.

03

Connect first

APP	WHY	GUIDE
Support mailbox	Bram reads new job requests here and leaves his replies in your Drafts folder. Lotte's review requests land there too.	03
Moneybird (optional)	Joost puts quotes and invoices in Moneybird as drafts. Finn watches unpaid invoices there.	03
Stripe (optional)	Finn reads what came in and makes invoices as drafts.	03

No mailbox yet? Bram says so once and works from requests you paste into the chat. Without Moneybird, quotes are saved as files plus a mail draft.

Your first week

Day 1 is the same for every kit: fill in your business profile with Michael. Then, one request a day.

1 Day 1, the profile

Click **Get to know my business and fill in the profile** in Michael's panel and answer his questions. Or type: "Vera, set up my business profile, including my opening hours, area and prices." Mention your trade, your working area, your hourly rate and your VAT situation. Bram also keeps a short file about your trade and hours; when he asks for it, two lines are enough.

2 Day 2

Type to Bram: "Bram, answer new job requests and ask for photos, m² and the address." He makes a job file for each request and leaves a reply draft in your mailbox. From now on this happens three times a day, plus a morning briefing. You will see the rounds under **Triggers**.

3 Day 3

Type to Joost: "Joost, make a quote for this job: [notes]." Paste your notes on the job. He calculates it with the right VAT and saves it as a draft, in Moneybird if it is connected, otherwise as a file in your team folder. If a price is missing from your price list he asks one short question.

4 Day 4

Dictate or type your notes from the day, then: "Joost, turn today's notes into work orders." You get a work order per job and the invoice lines that go with it, as drafts for Finn to turn into invoices.

5 Day 5 to 7

Type to Lotte: "Lotte, turn last week's finished jobs into review requests and one before/after post." She first asks which customers may be contacted. Then you get one personal review request per customer and a post suggestion with the photos to use. On Friday, read Finn's unpaid-invoice check.

TIP

Requests that work well for this kit: "Bram, what is on the agenda for tomorrow?", "Joost, follow up the quotes that have no answer yet.", "Lotte, what should I plan for the autumn campaign?"

Good to know

WATCH OUT VAT is not always simple. Joost uses 9% only for painting, plastering, wallpapering and insulation labour in homes older than two years. Everything else is 21%. Where the rule is unclear, or you work outside the Netherlands, he writes "VAT: check". Confirm those lines with your accountant before you send a quote.

- After you add the team, Bram's inbox rounds and morning briefing switch on by themselves. See them in **Triggers → Schedules**; toggle one off there or ask Michael to pause it. The computer must be on and Locally open.
- Files land in **Documents → Locally → trades**: job files, the agenda, quotes, work orders and Lotte's marketing drafts.
- There is no calendar connection. Bram's agenda file is the agenda; he keeps it up to date from what you tell him. Only you confirm a slot with a customer.
- The kit never changes prices, gives discounts or promises a date you did not give. Prices come only from your price list, earlier approved quotes or your answer.
- Payment reminders stay with Finn from the Basics team. General customer mail that is not about a job goes to Nina.

Stuck? We help.

Send us a message with a screenshot of what you see. A real person answers.

SUPPORT

Whop chat: whop.com/locallyai · Email: info@locallyai.nl

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