

Create a Service Agreement

Create a draft Service Agreement for a client with its dates, total budget and funding management, ready for NDIS catalogue line items to be added.

WHO IT IS FOR Owner, Admin, Manager, Coordinator, Finance	TIME NEEDED About 6 minutes	LAST REVIEWED 2 October 2026
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Who this is for

Permissions: You need **Can view service agreements** and **Can create service agreements**. If you cannot see the **Add Service Agreement** button, ask an Owner or Admin to check your role. The **Create draft and import line items** tick box also needs **Can manage agreement line items**, and **Activate** on an agreement's card needs **Can change service agreement status**. If your access is limited to certain sites, you can create agreements only for clients at those sites.

Before you begin

- You are signed in to BondiByte on a computer.
- The client already exists and is active. See [Create a client](#).
- You know the date the agreement starts. A total budget and a title are optional.
- If you plan to add line items, you also know the date the agreement ends. BondiByte works out the cost of each line item from the weeks between the start and end dates.



Steps

1 Go to **Clients** > the client > **Service Agreements** > **Add Service Agreement**

- 1 In the left menu, choose **Clients**, then choose the client's name to open their record.
- 2 Choose the **Service Agreements** tab. It lists the client's agreements, or tells you there are none yet.
- 3 At the top right, choose **Add Service Agreement**. The **Add service agreement** window opens.

Note: You can also start from **Service Agreements** in the left menu by choosing **Create agreement**. That **Create service agreement** window differs in a few ways. You choose the **Client** from a list. It has a **Service agreement ID** field that is filled in for you and a **Pricing zone** field, and it has no creation method buttons and no import tick box. Its save button is **Create Agreement**, and it does not grey out when something is missing: if the client or the start date is empty, a message says **Select a client and enter a start date before creating the agreement**. A successful save shows **Service agreement created**. The other fields work the same way as below.

The screenshot shows the BondiByte interface. On the left is a dark blue sidebar with a 'WORKSPACE NAVIGATION' menu. The 'Clients' item is highlighted with a red circle and a red number 1. The main content area is titled 'Avery Sample' and shows the client's record. The 'Service Agreements' tab is selected and highlighted with a red circle and a red number 2. At the top right of the main content area, the 'Add Service Agreement' button is highlighted with a red circle and a red number 3. Below the tabs, there is a 'Service Agreement History' section with a search bar and a 'Show' dropdown. The history is currently empty, showing '0-0 of 0 service agreements'. A message at the bottom says 'No service agreements' and 'Create a service agreement for this client to show agreement and budget history here.'

Choose **Clients** in the left menu and open the client (1), choose the **Service Agreements** tab (2), then choose **Add Service Agreement** (3).



2 Check the starting point, the client and the title

- 1 Leave **Start from scratch** chosen to build the agreement yourself. Choose **Use last agreement setup** instead to start from the client's most recently created agreement. The window then says **Copies fields and line items from** and that agreement's number, and it fills in the last agreement's title, start date, end date, total budget, funding management and notes. Its pricing zone and line items are copied too. This button is available only when the client already has an agreement.
- 2 Check that **Client** shows the right person. You cannot change it here.
- 3 Check that **Status** shows **Draft**. A new agreement is always a draft.
- 4 In **Agreement title**, type a name you will recognise. For a new agreement from scratch, the window suggests the client's name followed by service agreement. After **Use last agreement setup**, it shows the last agreement's title, so change it to tell the two apart.

Creation method: Start from scratch begins with empty fields. **Use last agreement setup** copies the client's most recently created agreement into the new draft. It is greyed out when the client has no agreement yet.

Client: The client whose record you opened. An agreement stays with its client for its whole life.

Status: Always **Draft** for a new agreement.

Agreement title: Optional. A recognisable name, shown under the agreement number in lists.

Important: If you choose **Use last agreement setup**, the window fills in the last agreement's title, dates, total budget, funding management and notes. Change **Start date** and **End date** to the new plan period before you save. If you save with the old dates, the new draft covers the same period as the earlier agreement.

Important: The client of an agreement cannot be changed after it is saved. If you started on the wrong client, create the agreement on the right client and deactivate the wrong one.

The creation method (1), the client (2), the Draft status (3) and the agreement title (4).



3 Set the dates, total budget and funding management

- 1 In **Start date**, choose the day the agreement starts. This is required. After **Use last agreement setup**, the last agreement's start date is already there, so replace it with the new plan's start date.
- 2 In **End date**, choose the day the agreement ends. Leave it blank only if you do not know it yet. After **Use last agreement setup**, replace the old end date with the new plan's end date.
- 3 In **Total budget**, type the agreed funding budget in dollars if you know it. This is optional. After **Use last agreement setup**, check the copied amount.
- 4 In **Funding management**, choose how the client's funding is managed: **Plan Managed**, **Self Managed** or **Agency Managed**.

Start date: Required. **Save agreement** stays greyed out until you choose a start date. Click anywhere in the field to open the date picker.

End date: Optional when you save. Add one before you add line items. It cannot be earlier than the start date.

Total budget: Optional. A dollar amount, zero or more, with up to two decimal places. The helper text says to use the agreed funding budget for this agreement. The agreement profile has no budget field later, so enter it now if you have it.

Funding management: **Plan Managed** by default. You can also choose **Self Managed** or **Agency Managed**. After **Use last agreement setup**, it starts with the last agreement's choice.

Important: If the client already has an agreement that would still be running on the new start date, and the new start date is in the future, BondiByte sets the end date of that earlier agreement to the day before the new one starts.

Note: This window has no **Pricing zone** field. A new agreement starts as **National**, or keeps the zone of the agreement it copies. You can change the zone afterwards in the agreement profile. See Choose a pricing zone.

The screenshot shows a form with four numbered sections:

- 1 Start date:** A date picker field showing 01/11/2026. Below it, a note says "Required. Click anywhere in the field to open the date picker."
- 2 End date:** A date picker field showing 30/10/2027.
- 3 Total budget:** A text field showing 60000. Below it, a note says "Optional. Use the agreed funding budget for this agreement."
- 4 Funding management:** A dropdown menu showing Plan Managed.

Below these sections is a large text area labeled "Notes".

Choose the start date (1) and end date (2), type the total budget (3) and choose the funding management (4).



4 Add notes, then choose Save agreement

- 1 In **Notes**, add anything your team should know. This is optional.
- 2 If you can manage line items, leave **Create draft and import line items** unticked unless you want the import panel to open straight after saving.
- 3 Choose **Save agreement**. Choose **Cancel** instead to close the window without saving.

Notes: Optional. You can change notes later in the agreement profile.

Create draft and import line items:

Optional tick box, shown only if you can manage line items. After saving, the new agreement opens with the line item import panel ready.

Optional. Use the agreed funding budget for this agreement.

Notes

☐

Create draft and import line items
After saving, open the new agreement with the line-item import panel ready to go.

3 Save agreement

Cancel

Add notes if you want to (1), leave the import tick box as it is (2), then choose Save agreement (3).



5 Check the new agreement in the client's list

- 1 A message confirms **Service agreement added to client**.
- 2 The window closes and the new agreement appears in the client's **Service Agreements** tab as a card with the status **Draft**. The tab also has a **Search** box, a **Show** list for how many cards appear on a page, and an **Open agreement register** link that goes to the **Agreement Records** list.

The card is a summary of the agreement. Choose anywhere on its header, other than a button or the number, to show or hide its details.

First pill, such as Draft: The group the agreement sits in, for example **Draft**, **Current** or **Expired**.

Agreement number and title: The number is generated for you. Choose it to open the agreement. The title sits under it.

Second pill, such as Draft: The agreement's **Status**. A **Signed copy** pill also appears once a signed copy is attached.

Activate: Makes this the client's active agreement after you confirm. It needs **Can change service agreement status**, and it is not shown for the client's current agreement or for an agreement whose end date has passed.

Import line items: Opens the line item import panel for this agreement. It needs **Can manage agreement line items** and is not shown for a signed or deactivated agreement.

Show or Hide: Opens or closes the card's details. The client's current agreement opens by itself.

Details: Funding, Start Date, End Date, Budget, Signed copy and the agreement's line items table. A new agreement shows **No line items**.

The screenshot shows the 'Avery Sample' client profile page. At the top right, a confirmation message (1) states 'Service agreement added to client.' Below this, the client's details are shown, including the name 'Avery Sample' and status 'Active'. The 'Service Agreements' tab is selected, showing a list of agreements. A new agreement card (2) is visible at the bottom, with the status 'Draft' and the ID 'SA-20261002-B4B731'. The card also displays the title 'Avery Sample Core Supports Agreement' and buttons for 'Draft', 'Activate', 'Import line items', and 'Show'.

The confirmation message (1) and the new agreement card with the status Draft (2).



6 Open the agreement and check its profile

Choose the agreement number on the card to open the agreement. Its **Agreement Profile** opens.

- 1 Check that **Status** reads **Draft**.
- 2 Check that **Pricing Zone** shows **National**, the zone every new agreement starts with.
- 3 Look at **Agreement Line Items**. It is empty until you add line items.

Agreement Profile Active Download PDF

Client service agreement summary.

CLIENT Avery Sample NDIS NUMBER -

STATUS **1 Draft** FUNDING MANAGEMENT Plan Managed

PRICING ZONE **2 National** START DATE 01/11/2026

END DATE 30/10/2027 TOTAL LINE ITEM COST \$0.00

NOTES -

Agreement Line Items Add line item Import line items

0 record(s)

TOTAL WEEKS **52 weeks** TOTAL LINE ITEM COST **\$0.00**

NAME	CODE	HOURLY RATE	HOURS/WK	TOTAL WEEKS	TOTAL COST	ACTIONS
Total cost					\$0.00	

The status reads *Draft* (1), the pricing zone shows *National* (2), and Agreement Line Items is empty (3).

What happens next

The agreement is saved as a **Draft**. BondiByte uses a client's **Active** agreement when it adds billing to shifts and prepares invoices, so a draft is not used until it becomes the client's active agreement.

To make a draft active yourself, choose **Activate** on its card in the client's **Service Agreements** tab. A confirmation titled **Activate this service agreement?** opens. Choose **Activate agreement** to confirm. The change is recorded in the client's **History** tab as **Service agreement status changed**.

Only one agreement can be active per client. When you activate a new one, the client's previous active agreement is marked **Expired** and deactivated, so it leaves the default **Agreement Records** list. The confirmation also warns that automated shift patterns and upcoming shifts that use line items from the previous agreement keep pointing at it, so review the line items on those shifts after the change.

If the client has no active agreement when the start date arrives, BondiByte can make the draft **Active** for you. It does this only when that draft is the only one that qualifies, and it tells your administrators.

Next, add line items from the NDIS catalogue. See [Add line items](#). You can also complete the rest of the details in the agreement profile. See [Complete the agreement profile](#).



Important notes

Important: A new agreement is a draft. Review its dates, funding management and pricing zone before you rely on it, and have your agreement wording checked by your own team or legal adviser. BondiByte provides the tools to build and manage agreements, not legal advice.

Good practice

- For a renewal, choose **Use last agreement setup**. It copies the last agreement's title, dates, total budget, funding management, notes, pricing zone and line items into a new draft. Change **Start date** and **End date** to the new plan period, and change the title, before you choose **Save agreement**.
- Enter the **End date** and the **Total budget** now, while you have the plan in front of you. The agreement profile has no **Total budget** field, and line item costs cannot be worked out until the agreement has an end date.
- Give every agreement a title you can tell apart at a glance, such as the plan year and the funding type. The title shows under the agreement number in lists and on the client's cards.
- Keep the new agreement as a **Draft** until its dates and line items are checked, then choose **Activate**. A draft is not used for billing, so you can work on it without affecting shifts or invoices.

Troubleshooting

I cannot see **Add Service Agreement**.

Why it happens: Your role does not include **Can create service agreements**, or the client is inactive. For an inactive client the tab says that create actions are paused until the client is reactivated.

What to do: Ask an Owner or Admin to check your role. If the client is inactive, reactivate the client first, then open the **Service Agreements** tab again.

I cannot see the **Service Agreements** tab on the client's record.

Why it happens: Your role does not include **Can view service agreements**.

What to do: Ask an Owner or Admin to check your role.

I cannot see **Activate** on the agreement's card.

Why it happens: Your role does not include **Can change service agreement status**, or the agreement is already the client's current agreement, has been cancelled or deactivated, or has an end date that has passed.

What to do: Ask an Owner or Admin to check your role. For an agreement whose dates are wrong, correct them in the agreement profile first.

Use last agreement setup is greyed out.

Why it happens: The client has no agreement yet, so there is nothing to copy.

What to do: Leave **Start from scratch** chosen.

The new agreement has the same dates as the earlier one.

Why it happens: You chose **Use last agreement setup** and saved without changing **Start date** and **End date**.

What to do: Open the new agreement, choose the edit icon in **Agreement Profile**, enter the new dates and choose **Save changes**. See Complete the agreement profile.



The **Save agreement** button is greyed out.

Why it happens: The start date is required and is still empty.

What to do: Choose a **Start date**. The button becomes available as soon as a start date is set.

A message says **Please check the information you entered and try again**.

Why it happens: Most often the **End date** is earlier than the **Start date**.

What to do: Correct the two dates, or clear **End date** if you do not know it yet.

I chose the wrong client, and the agreement is saved.

Why it happens: An agreement cannot be moved to another client.

What to do: Create a new agreement on the right client. If your role allows it, choose

Deactivate on the wrong agreement in the **Service Agreements** list in the left menu.

Need more help?

Guides: bondibbyterobotics.com.au/guides | Support: support@bondibbyterobotics.com.au

*Screens show a demonstration organisation with made-up names and may differ slightly as BondiByte is updated.
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