

Complete the agreement profile

Review an agreement's profile and update its title, status, funding management, dates and notes so the record is accurate before you rely on it.

WHO IT IS FOR Owner, Admin, Manager, Coordinator, Finance	TIME NEEDED About 5 minutes	LAST REVIEWED 2 October 2026
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Who this is for

Permissions: You need **Can view service agreements** to open the profile and **Can edit service agreements** to see the edit icon. That permission also covers changing **Status** in the form. A signed agreement is read-only and cannot be edited.

Before you begin

- You are signed in to BondiByte on a computer.
- The agreement already exists. See [Create a Service Agreement](#).
- If your access is limited to certain sites, you can open only the agreements of clients at those sites.



Steps

1 Go to **Service Agreements** > the agreement

- 1 In the left menu, under **Registers**, choose **Service Agreements**. The **Agreement Records** list opens.
- 2 In the search box, type part of the client's name or the agreement number. The list narrows as you type.
- 3 Choose the agreement number to open the agreement.

Tip: You can also open an agreement from the client's record. Choose **Clients**, open the client, choose the **Service Agreements** tab, then choose the agreement number.

The screenshot displays the BondiByte 'Service Agreements' interface. On the left, the 'Registers' menu is visible, with 'Service Agreements' highlighted (1). The main content area shows a search box with 'Avery' entered (2). Below the search box, there are filters for 'All statuses' and 'Active only'. A table of 'Agreement Records' is shown, with one record selected (3). The record details are as follows:

AGREEMENT	CLIENT	STATUS	DATES	BUDGET	ACTIVE
SA-20261002-848731 Avery Sample Core Supports Agreement	Avery Sample	Draft	01/11/2026 – 30/10/2027	\$60000.00	Active

At the bottom of the table, there are controls for 'Rows' (set to 50), 'Back', '1-1 of 1 agreements', and 'Next'.

Choose **Service Agreements** in the left menu (1), search for the client or agreement (2), then choose the agreement number (3).



2 Read the Agreement Profile and choose the edit icon

- 1 Check **Status**. A new agreement is a **Draft**.
- 2 Do not mistake **Status** for the green badge beside **Download PDF**. That badge reads **Active** for any agreement that has not been deactivated, including a draft.
- 3 Check **Pricing Zone**. It tells you which NDIS catalogue prices are suggested for new line items.
- 4 At the top right of **Agreement Profile**, choose the pencil icon, **Edit agreement profile**. The profile turns into a form.

Client and NDIS Number: The client the agreement belongs to. They cannot be changed.

Status: The agreement's own status: **Draft**, **Active**, **Expired**, **Cancelled** or **Suspended**. Step 3 explains each one.

Funding Management: How the client's funding is managed.

Pricing Zone: **National**, **Remote** or **Very Remote**.

Start Date and End Date: The period the agreement covers. Line item costs are worked out from these dates.

Total Line Item Cost: The total of the agreement's line items. It changes as you add or remove line items, and you cannot edit it here.

Notes: Anything your team has recorded about the agreement.

Agreement Profile

Client service agreement summary.

2 Active

Download PDF

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CLIENT	Avery Sample	NDIS NUMBER	-
STATUS	1 Draft	FUNDING MANAGEMENT	Plan Managed
PRICING ZONE	3 National	START DATE	01/11/2026
END DATE	30/10/2027	TOTAL LINE ITEM COST	\$0.00
NOTES	-		

Check the status (1), note that the green badge only shows the record is switched on (2), check the pricing zone (3), then choose the edit icon (4).



3 Update the profile details

- 1 In **Agreement title**, change the name if you want to.
- 2 Check **Status**. Leave it as **Draft** while you are still preparing the agreement.
- 3 In **Funding management**, choose **Plan Managed**, **Self Managed** or **Agency Managed**.
- 4 Check **Start date**. It is required.
- 5 Check **End date**. Clear it only if the end date is not known.
- 6 In **Notes**, type anything your team should know.

Client, NDIS Number and Service

agreement ID: Shown greyed out. The service agreement ID is generated automatically and cannot be edited.

Agreement title: Optional. Shown under the agreement number in lists.

Status: Draft: being prepared, and not used for billing. **Active:** the client's active agreement, which BondiByte uses when it adds billing to shifts and prepares invoices. **Expired:** finished. BondiByte sets it once the end date has passed, or you can choose it, and it deactivates the agreement.

Cancelled: ended early. You choose it, and it deactivates the agreement. **Suspended:** you choose it, and the agreement stays in the default list.

Funding management: Plan Managed, Self Managed or Agency Managed. This is how the client's funding is managed. The create window starts it as **Plan Managed**.

Pricing zone: National, Remote or Very Remote. Changing it affects new line items only. Existing agreed rates are unchanged.

Start date: Required.

End date: Optional. It cannot be earlier than the start date.

Notes: Optional free text.

Important: Choosing **Active** makes this the client's active agreement. Only one agreement can be active per client, so the client's previous active agreement is marked **Expired** and deactivated, which removes it from the default **Agreement Records** list. This form saves straight away. Check **Status** before you choose **Save changes**, and review the line items on upcoming shifts, which keep pointing at the previous agreement. (The **Activate** button on the client's card asks you to confirm and gives the same reminder.) Choosing **Expired** or **Cancelled** also deactivates the agreement, so it leaves the **Agreement Records** list unless you choose **Include inactive**.

Note: BondiByte marks an agreement **Expired** once its end date has passed. The profile has no field for **Total budget**, which is set only when the agreement is created.



Agreement Profile

Client service agreement summary.

Active Download PDF

Client: Avery Sample NDIS Number: Service agreement ID: SA-20261002-B48731 Agreement title: Avery Sample Core Supports Agreement

Status: Draft Funding management: Plan Managed Pricing zone: National Start date: 01/11/2026

End date: 30/10/2027

Notes: Draft for the 2026-27 plan year.

Save changes Cancel

Change the title if needed (1), check the status (2) and funding management (3), check the start date (4) and end date (5), and add notes (6).

4 Choose Save changes

- 1 Check your changes, then choose **Save changes**.
- 2 Choose **Cancel** instead to leave the form without saving.

End date: 30/10/2027

Notes: Draft for the 2026-27 plan year.

Save changes Cancel

Agreement Line Items Add line item Import line items

Choose **Save changes** (1), or **Cancel** (2) to leave without saving.



5 Check the saved profile

- 1 A message confirms **Service agreement profile updated.**
- 2 The form closes and the profile shows your changes, for example the new text in **Notes**.

Avery Sample Core Supports Agreement

1 Service agreement profile updated.

Agreement Profile Active Download PDF

Client service agreement summary.

CLIENT	Avery Sample	NDIS NUMBER	-
STATUS	Draft	FUNDING MANAGEMENT	Plan Managed
PRICING ZONE	National	START DATE	01/11/2026
END DATE	30/10/2027	TOTAL LINE ITEM COST	\$0.00

2 NOTES Draft for the 2026-27 plan year.

The confirmation message (1) and the updated notes in the profile (2).

What happens next

The profile shows your changes straight away. The change is recorded in the client's **History** tab as **Service agreement updated**. The entry names the agreement and who made the change, not which field changed.

Add or review the agreement's line items below the profile. See Add line items.

If you changed **Status** to **Active**, the agreement is now the client's active agreement and the previous one is marked **Expired**. BondiByte uses the client's **Active** agreement when it adds billing to shifts and prepares invoices.

Important notes

Important: An agreement with a signed copy, or a completed E-signature, is read-only. The edit icon is greyed out when a signed copy is attached, and a save is refused once an E-signature is complete. Create a new agreement for the next set of changes.



Good practice

- Keep **Status** as **Draft** while you are still preparing the agreement. Choose **Active** only when the agreement should start being used for billing, because it also marks the client's previous active agreement **Expired**.
- Set the correct **Start date** and **End date** before you add line items. Each line takes its dates from the agreement when you add it, so lines you saved earlier keep their weeks and cost if you change the agreement's dates afterwards.
- Use **Notes** to say why you changed something, such as the plan review that led to a new end date. The **History** tab records only that the agreement was updated, not what changed or why.
- Check the pricing zone before you add line items. Changing the pricing zone affects new line items only, and existing agreed rates stay as they are. See [Choose a pricing zone](#).

Troubleshooting

I cannot see the edit icon.

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

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

The edit icon is greyed out.

Why it happens: The agreement has a signed copy and is read-only. Pointing at the icon shows **Signed agreements are read-only**, and a banner on the page says **This service agreement has a signed copy and is now read-only**.

What to do: Create a new agreement for the changes you need.

A message says **This service agreement has been signed and is read-only**.

Why it happens: The agreement has a signed copy or a completed E-signature, so BondiByte refuses the change.

What to do: Create a new agreement for the changes you need, for example for the next plan period.

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, then choose **Save changes** again.

The agreement has disappeared from the **Agreement Records** list after I saved.

Why it happens: You set **Status** to **Expired** or **Cancelled**, which deactivates the agreement. The list shows active agreements only by default.

What to do: In the list, change **Active only** to **Include inactive** to see it again.

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. Last reviewed 2 October 2026.