

Overview of TIDY’s Software Products

This overview is designed to help customers and third parties understand how TIDY works, which parties control transactions, and the business status of service providers. This guide is particularly for those looking to understand matters of liability or employment.

This guide will go over in detail:

- TIDY provides software tools to help property managers manage the cleaning and maintenance of their properties and service pros manage their businesses.
- TIDY exerts no control over jobs between property managers and pros. Those parties retain power over and liability for their jobs.
- Service Providers are bonafide independent businesses or are added directly by a property manager as an employee or contractor.

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TIDY Software Overview

TIDY has software to help 2 main groups of customers:

1. Service professionals like plumbers, electricians, pool cleaners, home cleaners, window washers, lawn & garden professionals, junk removal specialists, handymen, carpet cleaners, and any custom service type.
2. Property managers like Airbnb hosts manage the cleaning and maintenance of their properties.

For home service pros, we offer software for them to run their whole business. This includes features like tracking and managing all their customers and prospects, invoicing their clients, sending proposals, helping market to their customers, creating their own website, and more. These features are paid for by a subscription and industry-standard credit card processing fees (similar to Stripe, Square, or PayPal).

For property managers, we offer software for them to manage their property cleaning and maintenance. This includes allowing them to map their property, track the assets on their property, track the property manager's employees and vendors they work with on the property, create workflows to automate booking those vendors (including home service pros), create to-do lists and action items to share with employees, and track accounts payable for the vendors that work on their property. If they need help contacting new professionals, they can search for available pros who use the software, set their requirements, and book them directly, tracking them like any other vendor. We make most of our money from this group through subscription fees, typically \$120 per property per year.

TIDY Features for Pros - Summary

TIDY offers a suite of software tools and features to help home service pros grow and manage their business. Home service pros are typically small business owners who seek to use TIDY's software because it is cheaper than competitors like Jobber, ServiceTitan, or HousecallPro. To sign up, pros typically go to the product's website, tidy.com/pros. This page expressly states:

*“*** TIDY is for bona-fide professionals with their own business (sole proprietorships & new businesses are ok). By using the TIDY software you are a customer. TIDY does not employ home service workers. TIDY is not for you if you are a “gig worker” or looking for employment.”*

For more details, you can view tidy.com/pros.

They can browse a wide range of features on the website, including:

- The ability to send proposals and eSignatures to their prospects.
- The ability to send invoices to their customers.
- The ability to accept credit cards from their customers via a third party, Stripe. Note: we do not issue any payments directly to pros; payments flow from a pro's clients to Stripe to their account directly.
- The ability to set up online booking for their customers.
- The ability to track their clients in a CRM.
- The ability to control their team, including delegating jobs to their employees or subcontractors.

After determining that they want to sign up, here is typically how someone sets up their account.

1. First, pros agree to the Service Provider Customer Agreement or propose an alternate one.
2. Pros add the services they offer. It can be anything but includes a name, description, and prices for their services. Their rates can be hourly, fixed-rate, or more.
3. Pros enter their subcontractors or their employees.
4. Pros enter locations they wish to be bookable by clients via their website.
5. Pros enter times they want clients to be able to book them.
6. Pros enter any other booking settings they may have, including their cancellation policy, uploading their default contract with customers, enabling dispute resolution, setting up discounts for clients, allowing location tracking, and more.
7. Pros add in their existing clients to track and manage their jobs.
8. Pros delegate jobs to their employees or subcontractors.
9. Pros set up their settings about what kind of payment methods they will accept, such as cash, check, Venmo, CashApp, credit card, or other. Before they can collect payments, they must re-review the terms of use and confirm their agreement.
10. Pros send their clients invoices as they complete jobs, with a unique link for their clients to track all of the pro's proposals, invoices, and jobs. Here the client can pay for the invoice, following the settings laid out by the pro.
11. Pros use their marketing website to get new clients. They set their criteria and list anything that might help encourage clients to book.
12. Clients book from the website, choose from the pro's services, and sign up directly with that pro. When a client books a pro at the pro's price, they are booking the pro at their offered rate. TIDY does not make a portion of the proceeds.
13. Pros can create custom proposals to send their prospects, which include pricing and terms.
14. Clients can accept and eSign proposals.
15. Pros and clients set agreements directly with each other, and these can be changed anytime.
16. Pros can manage any reviews or disputes that arise and attempt to resolve them in app.
17. Pros can integrate with other lead sources and third parties to view all leads in 1 place. Examples include bark.com.

TIDY considers our three largest competitors for pros to be ServiceTitan, Jobber, and HouescallPro.

TIDY Features for Pros: Walkthrough

Now, we will go through a more detailed walkthrough, including screenshots of the pro app as it looks on the web, iOS, or Android apps.

When a pro signs up, first they typically go through our main page tidy.com/pros, where they see a description of their features and the disclaimer. Note how our software expressly is designed for bona-fide business owners, and this is repeated throughout the process.

http://tidy.com/pros Go DEC APR SEP 12 2022 2023 2024 About this capture

30 captures
25 Sep 2020 – 13 Jun 2024

GROW YOUR BUSINESS.

Today is the day to build the business of your dreams. Share your mission with the world — and blow your customers away.

START NOW

GET IT ON Google Play


Download on the App Store


* Private Clients default to you for all bookings but can change their preferences. Clients not prohibited from using the TIDY Software independently to manage other vendors or manage their properties in any way.


** Maximum potential earnings and hourly rates vary by your location, your skill, your account settings, & the amount you work.


*** TIDY is for bona-fide professionals with their own business (sole proprietorships & new businesses are ok). By using the TIDY software you are a customer. TIDY does not employ home service workers. TIDY is not for you if you are a “gig worker” or looking for employment.


By signing up you agree to [Service Provider Customer Agreement](#).

 **Create Account**

 First Name

 Last Name

 Email

 Password

Do you already have existing clients you work with?

☐ No clients yet

☒ Yes I have existing clients

What does your team look like?

☐ Just me

☐ Me + others (anyone you might work with or send jobs to)

☐ I agree to the [Service Provider Customer Agreement](#), which includes agreeing to individual arbitration.*

Create Account

*If you would like an alternate agreement, contact sales@tidy.com instead of agreeing to these terms.

Then, pros land on a sign-up page, where they fill out some basic information, including what their team looks like, what their existing clients look like, and agree to the Service Provider Customer Agreement. It also includes instructions on how to message us about an alternate agreement, which we support.

Complete all these steps to get the maximum number
Clients at the times, locations, and rates you want.

0/10 Completed

☐ **Add Account Info**

So Clients know who you are.



☐ **Confirm Email**

To ensure your email is correct.



☐ **Confirm Phone**

For Client communication and notifications.



☐ **Set Max Drive Time**

So Clients know what your work area is.



☐ **Make Yourself Bookable**

So Clients can book you instantly.



☐ **Learn About Getting New Clients**

Learn about how Clients can find and book you
via your listing and public website.



☐ **Review & Confirm Terms**

Re-review the terms again to be sure you agree
and understand.

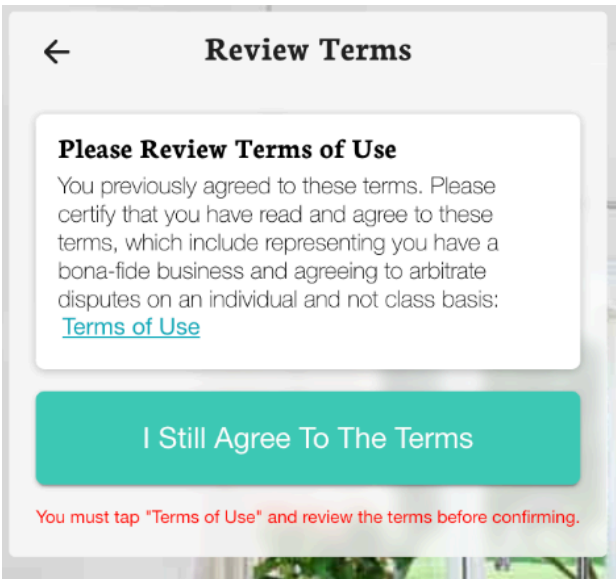


☐ **Certify Equipment**

Confirm you have equipment so you can get
Clients who require this confirmation.



Pros then have to complete a series of onboarding steps, depending on the features they are using. If they are looking to get new clients with their public website, collect payments, and some other features they must complete more steps.



Before being able to use any feature that involves payments (such as payment processing) or marketing, they must expressly go through a step to review the terms. Notably, this emphasizes dispute resolution AND that they have a bona-fide business, which is the heart of the agreement. Users **MUST** tap “Terms of Use”, taking them to the page with the terms, in order to press “I Still Agree To The Terms”. If they do not, then they get an error that states “You must tap “Terms of Use” and review the terms before confirming”.



Certify Equipment

Already Have a Web Presence?

If you are on Yelp or Google Places, you can provide that URL to validate yourself instead of a photo. [Get Instant Certification](#)

Confirm Supplies

Confirm that you have the supplies and materials necessary to provide the services listed on my profile. For example, for cleaning this includes a vacuum and mop.

☐ I Have Supplies

Equipment Profile Photo

Take a photo of your equipment. Clients may see it so make it look good!

Take Photo

To help prove they are an independent business, they can take photos of their professional business equipment. Since the intent is to ensure they are a bona-fide business, they can also submit an existing yelp or google places link to avoid equipment.

←

Active in Community

This Certification helps clients feel more comfortable booking you, someone who takes pride in their public image and has a true business. This may be required by some clients.

☐

TIDY Client App

▶

☐

TIDY Homekeeper App

▶

☐

Google Places

▶

☐

Your own Yelp page

▶

☐

Your own Facebook Page

▶

☐

Your own Twitter

▶

☐

Your own Instagram

▶

☐

Your own webpage

▶

☐

Your consumer affairs page

▶

☐

Your own Angies List profile

▶

The pro may also have to complete further validation of public presence by providing public links or collecting reviews from existing customers.

←

Your own Yelp page

Steps to Complete:

1) Post on your Yelp page promoting your business in a positive light.

2) Confirm the text of your post.

3) We verify its there.

Aa

Post Text

Confirm

←

Receive Payments

Complete steps to set how you want to get paid by your clients:

0/2 Completed

☐

Confirm Payment Settings

You can allow clients to pay your invoices with cash, check, through credit card via TIDY, or any other method.

▶

☐

Choose Payout Type

If opting to use TIDY's payment processing system, TIDY pays out payments collected from your clients once a week. You can get paid out via direct deposit, credit card or check.

▶

←

Add Payment Option

Add a new option for Clients to pay invoices.

ⓘ Payment Option*

Venmo

PayPal

Cash App

Zelle

☒ Preferred payment option

Add Payment Option

For payments, they can set what payment methods they want to offer clients. If opting to allow clients to use TIDY's payment rails (e.g. credit card) then they can select a payout method including check, ACH/direct deposit, and credit card (if they have a merchant account elsewhere).

TIDY's goal is to support any payment option the pro may want to collect payments from customers. Pros can add as many options as they like. Clients can choose from these options when receiving an invoice.

←

Services

What types of services do you offer?

☐ Regular Cleaning

☐ Pool Cleaning

☐ Carpet Cleaning

☐ Window Washing

☐ Lawn & Garden Care

☐ Junk Removal

☒ Pest Control

☐ Pressure Washing

☐ Tree Trimming

☐ Inspection

☐ Pressure Washing

☐ Tree Trimming

☐ Inspection

☐ Handyman

☐ Trash Service

☐ Laundry Service

☐ Locksmith

☐ Painting

☐ Grill Maintenance

☐ Biohazard Cleaning


☐ Plumbing


☐ Appliance Repair

Don't see what you offer? [Request Type](#)

Save

Pros then typically set up the categories of services that they offer.


 **Add Service**


 **Pest Control**

Service Type

Pest Control

Don't see the type? [Request Type](#)

 Service Name


 Service Description


☒ Allow Clients to book on my website

Billing Type

Billing Type

Flat Rate


 Flat Rate


 Block Off My Schedule For


[Advanced Settings](#)


Add Service


Pros then add the specific services themselves, including name, description, whether these should be listed on their website, and the billing types (for example flat rate, hourly, free, or “price later” if it is unknown).


 **Add Client**


 First Name *

 Last Name *

 Email

 Phone Number

 Address

 Unit / Suite

Zipcode

By adding I accept the terms ([Service Provider Customer Agreement](#))

Add Client

Pros then add the specific services themselves, including name, description, whether these should be listed on their website, and the billing types (for example flat rate, hourly, free, or “price later” if it is unknown).

←

Teams

Send jobs to your team members or join other teams to get jobs from them! [Learn More](#)

My Team

Bob's Amazing Plumbers [Edit](#)

We unclog, unplug, and get it done.

Members

None.

Invite Team Member

Teams I Am On

None.

Set Up Team Payments

Next, pros add team members. They have the option to limit that person (if they are an employee). They must confirm they are taking responsibility for the person, whether they are an employee or contractor.

←

Invite Team Member

This asks someone to join your team, so you can send them to your jobs.

Email

First Name

☐ Limit their permissions (optional)

If you want to prevent this user from adding or managing clients, instead just let them only accept and view jobs you assign, tap here. This is good if they are your employees. Note: if they already have a TIDY account this will not limit them.

I understand I'm responsible for jobs I delegate to

☐ team members, including insurance, safety, compliance, legal, and employment obligations.

I still agree to the [Terms of Use](#), and that my team

☐ members are employees/subcontractors are subject to these terms.

Invite Team Member

Bookable Hours

February, 2024 ▶

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	1	2
3	4	5	6	7	8	9

Pause All Bookable Hours

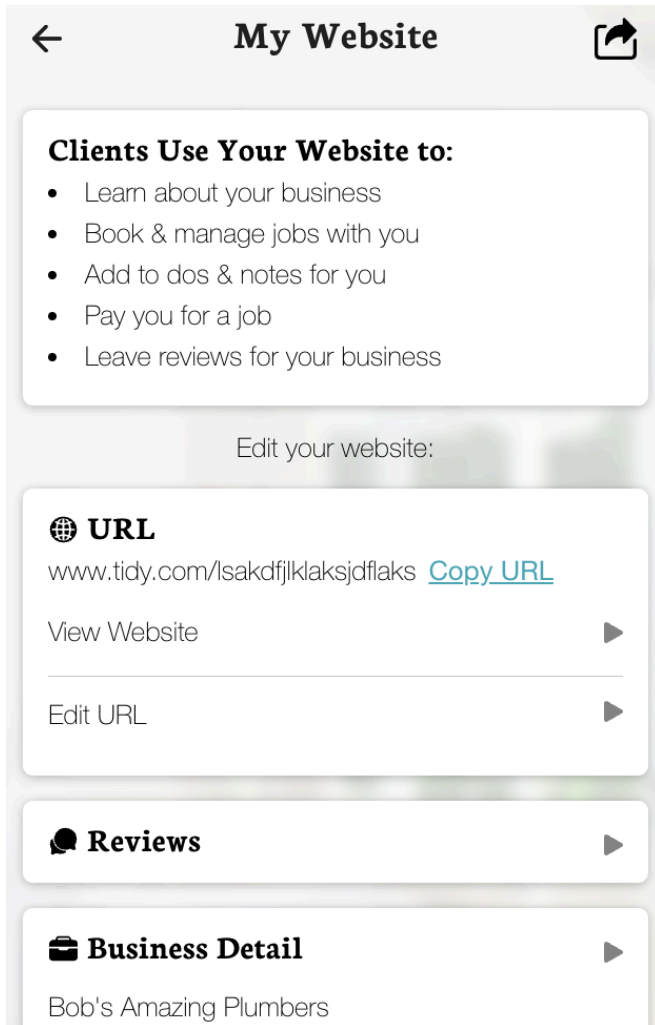
Bookable Hours Change History

New Bookable Hours: Fridays 3/1 and all future Fridays - 8:00AM, 8:30AM, 9:00AM, 9:30AM, 10:00AM, 10:30AM, 11:00AM, 11:30AM, 12:00PM, 12:30PM, 1:00PM, 1:30PM, 2:00PM, 2:30PM, 3:00PM, 3:30PM, 4:00PM, 4:30PM

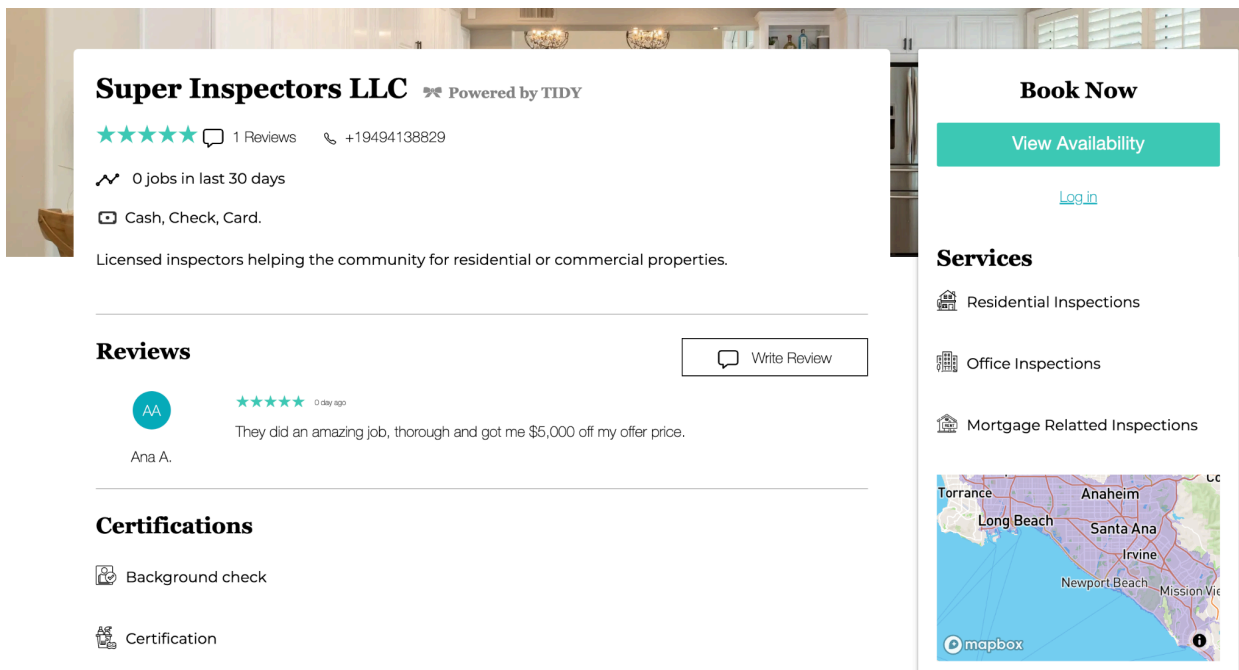
Pros can set the hours they want clients to be able to see their schedule (like OpenTable) and book with them. They also set the locations they want to serve.

Locations Served

Block New Zipcode



They set up their public website to coordinate with clients and get new business. With no hosting or setup, just some simple questions and answers, they get their own webpage with booking options. The pages follow a template approach they customize. They get a pretty tidy.com url that allows them to share this anywhere publicly and have clients book them directly on their schedule following their settings.



Send Proposal to

New Client ▾

First Name

Last Name

Email

Phone Number

Address

Unit / Suite

Zipcode

Service Detail

Service Type

Pest Control ▾

Service Description

Pros will take care of a variety of pest issues including rats, mosquitos, cockroaches, adn more. We arrange it & contact you to confirm pricing and scheduling before finalizing.

Service Price

\$0.00

Pros can start sending proposals to their clients and tracking things. Proposals act a bit like an eSigned contract with a client and can include any information they like.

←

Confirm Proposal

Charlie will receive an email with a link to this proposal.
[Copy URL](#)

Proposal From

Lsakdfjlk Laksjdflaks
lkjalksf@mailinator.com
(949) 413-8829

To: Charlie

Sent 2/23/24

Valid At: All Addresses

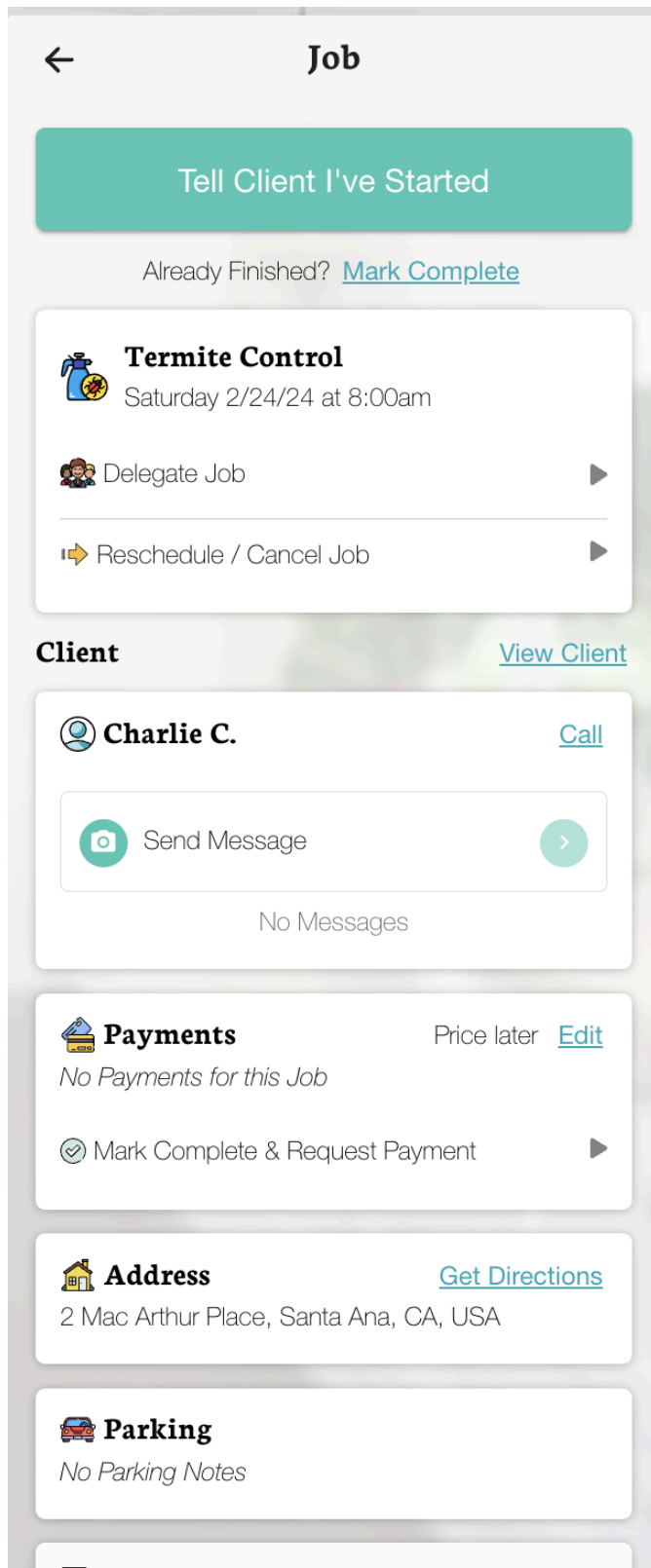
Service	Cost
Pest Control Pros will take care of a variety of pest issues including rats, mosquitos, cockroaches, adn more. We arrange it & contact you to confirm pricing and scheduling before finalizing.	\$500

We are proud to offer this option for 30 days:

Lsakdfjlk

Laksjdflaks

Send Proposal



For each job, pros can send updates, update status, delegate the job to their team members, send messages, request payments, see client preferences, and more.

What did the job cost?

 Job Price

\$100.00

Invoice From

Lsakdfjlk Laksjdf laks

lkjalksf@mailinator.com

(949) 413-8829

To: Charlie C.

Sent 2/23/24

Service

Owed

Termite Control

\$100.00

2/24 8:00am at 2 Mac Arthur Place, Santa Ana,
Ca, Usa

Job Duration: 1 hour

Total

\$100

We thank you for your business!

Lsakdfjlk
Laksjdf laks

Invoice Notes

Public note ▼



Add Note




No Invoice Notes


Send Invoice

After jobs, Pros can send invoices to clients, specifying the job they did and their rates. Clients can then pay the invoice using the payment methods authorized by the pro.

Viewing & Exporting Agreements

When in the account, pros can see a menu option for “Agreement Management”. Here they can see the terms, when they first agreed, and last agreed to the terms. This page is one page where people can request a different agreement, which we support. This date for “first agreed” is the first time in our database that they agreed to our terms and the “last confirmed” is the last time they clicked a box or took action to affirm their agreement with the terms. If someone requests an export, we generate a pdf copy of the agreement they agreed to, affixing metadata from the signature to the agreement.

 **More**


 **Reports**

Mileage Tracking ▶

Tax Center ▶

Accounting ▶


Equipment Tracking ▶


 **Marketing**

Email Marketing ▶

Postcard Marketing ▶

Local Service Ads ▶


 **Agreement Management** ▶

 **Help**

Documentation ▶

Contact Support ▶

My Account ▶

 **Agreement & Terms**

Agreements With TIDY

You have opted to not use a custom agreement, and are currently subject to the terms available at <https://www.tidy.com/legal/service-provider>. To request a pdf copy of this agreement, please contact us. To request a custom agreement, contact legal@tidy.com at this time. [View Agreement](#)

First Agreed:
2023-04-21T09:44:05.467 PDT

Last Confirmed:
2023-07-12T11:08:39.772 PDT

Agreements with Clients

Manage your agreements with clients here. Start by uploading a contract, then you can assign it to your clients, jobs, and more. [Learn More](#)

These are some key features, but the TIDY website walks through these features and more.



Menu ▾ LOG IN

GET STARTED

Software to get you more clients & save time.

Want more clients? Over 10,000 service professionals use TIDY as a great way to automate admin work and get new clients where they want, when they want, at the rates they want. **Sign up to see how many clients you can get, 100% free.**

GET STARTED



"I struggled to find clients until TIDY helped me earn \$200 more per day. It was easy. Now I feel more professional with real software to help me." - Mia

100% Custom to Your Industry.

Don't mess around with a solution that doesn't fit your business. Use TIDY for the following businesses:



SIGN UP FOR FREE

Top Features



1

Get Clients from TIDY

Set the times and services you offer, and clients from our network can book directly on your schedule.

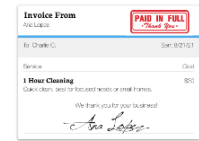
[Learn More](#)

2

Invoicing Software

Send your clients invoices that list what they owe and how they can pay you. Pick from Venmo, Zelle, cash, credit card, & more.

[Learn More](#)

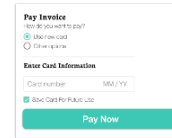


3

Accept Credit Cards

Credit cards are the preferred way for most clients to pay. Accept credit cards. The first \$100 each month is free!

[Learn More](#)



4

Send Beautiful Proposals

If someone isn't ready to commit immediately, send them a beautiful proposal with free eSignature option, so they are more likely to accept.

[Learn More](#)



5

Online Booking

Allow clients to book you on your website, or a personalized client link you can copy and send to them.

[Learn More](#)



6

Manage Scheduling

Manage all jobs for you, or your team, in 1 place. This makes it easy to know what is going on and avoid issues.

[Learn More](#)



7

Client Manager (CRM)

Track all of your clients, so you can filter people by different stages and follow up. Great for looking for people who haven't booked in a while, or who never finished.

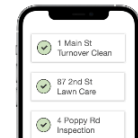
[Learn More](#)



8

Marketing Help

We have 4 strategies proven to help home service businesses grow. They involve Google Ads, Facebook Ads, social media posting, and email newsletters. We will help you run these playbooks to grow your business.



Clients From TIDY

Play with Sound



TIDY Private Guarantee

We want to make your loyal Clients more loyal. We don't send ads to your private clients and protect your data with bank-level security.



Trusted by Thousands

Over 100,000 happy customers and always improving. [See reviews](#)

Crafted To Help You:

Earn More

Get Clients from TIDY when you want, let your customers book you online, and collect payments.

Save Time

Send reminders, collect payments from customers, let clients download invoices and reschedule themselves, and more.

Keep Organized

Track all your clients in one spot to avoid double bookings. Track teammates, equipment, jobs, and more.

Save Money

Smart drive time optimization limits how much you drive. Track mileage and equipment usage to write off on taxes. Never pay more than you have to.

Delight Clients

Let them clients see maps of you coming to them, track what they want done in their home, and let them do things in their online portal.

Stay Safe

Stay physically safe in home with safety features. Avoid violating government regulations with huge fees with our compliance features.

TRY OUT FEATURES - FREE



"This app is well thought out and was super easy to get started on. I was able to get my clients on it the same day."

Jessica M.



"Within 1 week I had several new clients, right on my schedule at the rates I picked. It's really Hard to beat that."

Janet L.

The Lowest Pricing

Free

\$0

Up to 20 jobs/month.

Use TIDY free for most features up to 20 jobs per month.

GET STARTED

Paid

\$20

1st User / month

+ \$5 per additional user / month

TIDY is the lowest cost tool for most to run a home service business. Save 50% by paying annually.

TALK TO AN EXPERT

BILL YEARLY

BILL MONTHLY

TIDY pays for itself fast. Many pros earn \$1,000 or more in 30 days!

Included Features

All features are included in all plans except phone system and credit card processing, including:

Feature	Price
<div><div>✓</div><div>Get a professional website Let customers view you online.</div></div>	Included
<div><div>✓</div><div>Accept bookings online Set your availability and let clients book on your schedule without needing you to do work.</div></div>	Included
<div><div>✓</div><div>Automated appointment reminders</div></div>	Included
<div><div>✓</div><div>Easily collect tips & reimbursements</div></div>	Included
<div><div>✓</div><div>Charge for no-shows or late cancellations</div></div>	Included
<div><div>✓</div><div>Track mileage & savings</div></div>	Included
<div><div>✓</div><div>Send quotes with automatic follow ups Win more business</div></div>	Included
<div><div>✓</div><div>Invoice clients with automatic follow ups Get paid faster</div></div>	Included
<div><div>✓</div><div>Optimize your schedule Track one time & recurring appointments and availability. Optimize your drive time.</div></div>	Included
<div><div>✓</div><div>Delegate jobs to team members Track & control your team.</div></div>	Included
<div><div>✓</div><div>Client History View a full history of your clients, communication, & jobs.</div></div>	Included
<div><div>✓</div><div>Client and Job CRM Manage clients and jobs online for your team.</div></div>	Included
<div><div>✓</div><div>Business Reports Track earnings & growth trends.</div></div>	Included
<div><div>✓</div><div>Bid on Clients from TIDY when/where you want them. You pick your price.</div></div>	Included
<div><div>✓</div><div>Accept credit cards and get paid direct to your bank. 2.9% + \$0.30 per transaction.</div></div>	Paid
<div><div>✓</div><div>The best phone system for home service pros. (in beta) \$0.02/phone minute, \$0.02/text & \$20/mo min.</div></div>	Paid



"I've thoroughly enjoyed my experience with Tidy. The clients are always kind and professional.. Having years of experience cleaning homes it brings me joy to brighten someone's living space. It's been a great experience!"

Rita M.

FAQs

Is the free plan really free?

Yes, many people pay us nothing. We don't even collect a credit card for almost anything. The paid subscription is for those that track >10 jobs per month. Paid features are for collecting credit cards. It's very common to use us with only your own private clients and pay us nothing, although a nice review is always nice if you want to give us something. 🙏

Can I cancel anytime?

Yes, you can cancel anytime.

GROW YOUR BUSINESS.

Today is the day to build the business of your dreams. Share your mission with the world — and blow your customers away.

START NOW



- * Private Clients default to you for all bookings but can change their preferences. Clients not prohibited from using the TIDY Software independently to manage other vendors or manage their properties in any way.
- ** Maximum potential earnings and hourly rates vary by your location, your skill, your account settings, & the amount you work.
- *** TIDY is for bona-fide professionals with their own business (sole proprietorships & new businesses are ok). By using the TIDY software you are a customer. TIDY does not employ home service workers. TIDY is not for you if you are a "gig worker" or looking for employment.

By signing up you agree to [Service Provider Customer Agreement](#).

About TIDY

[Pro Reviews of TIDY](#)

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[Help & Documentation](#)

Features

[Get Free Clients](#)

[Schedule](#)

[Proposals](#)

[Invoices](#)

[Credit Card Processing](#)

[Online Booking](#)

[Client Manager \(CRM\)](#)

[Automated Marketing](#)

[Review Management](#)

Industries

[House Cleaning Software](#)

[Lawn Care Software](#)

[Pool Service Software](#)

[Carpet Cleaning Software](#)

[Window Washing Software](#)

[Pest Control Software](#)

[Inspection Software](#)

[Appliance Repair Software](#)

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TIDY Features for Property Managers: Summary

TIDY also helps property managers manage multiple vendors or employee of the property manager (collectively “pros”). Property managers can be people with a single property they own/rent, or people with many properties. TIDY can generally help property managers more when their situation is complex (e.g. vacation rentals, multiple properties, etc), and are our primary customer focus. Property managers can:

1. Add property details for all their properties.
2. Track their assets.
3. Map their properties.
4. Set and track maintenance requirements for those properties.
5. Monitor and track maintenance projects, work orders, and issues.
6. Create and assign jobs to their pros.
7. Add and manage all of their pros, including setting rates, autopay limits, and more.
8. Generate a digital To-Do list to share with any of their providers.
9. Integrate with Airbnb and other platforms to sync job schedules.
10. Track that their vendors comply with their requirements, which can include insurance, background checks, identification, or other requirements.
11. Create workflows to automate various processes.
12. Track accounts payable to their tracked vendors.
13. The property manager has several options to send job requests to pros. They can:
 - a. Assign jobs to pros,
 - b. Send requests to their list of pros,
 - c. Send requests to individual pros,
 - d. Browse pros in their area,
 - e. Find a new pro using a strategy they select.

We are particularly useful to Airbnb hosts, for whom managing all this is really hard, and we make it easy. In return for these features, TIDY generally charges a subscription fee.

To learn more about how TIDY works, we generally advise customers look at our documentation or terms. Our goal is to provide a platform for people to do what they want, not define any specific approach. This is why we deliberately do not take an approach “like Uber” (which is strongly opinionated and controlling) but rather more build tools more “like Shopify” (which helps provide flexible tools to build the store they want).

These features may be most concisely viewed online on our pricing page tidy.com/pricing.

Pricing for TIDY

BILL YEARLY BILL MONTHLY

Free

Great for people with 1 property/unit.

\$0 / unit / mo

Free plan features:

- Manage unlimited pros/jobs
- Amazing operations software
- Book cleaning/maintenance anywhere

[START NOW](#)

TIDY+

Great for long-term rental managers.

\$3 / unit / mo

Everything in Free, plus:

- More users and properties
- Save using our ops team
- Basic integrations & automations

[Start Free Trial or TALK TO AN EXPERT](#)

Standard

Great for short-term rental (STR) managers.

\$10 / unit / mo

Everything in Basic, plus:

- All software features
- Powerful automations
- Limited use of our human concierge

[Start Free Trial or TALK TO AN EXPERT](#)

Advanced

For the most advanced property managers.

\$20 / unit / mo

Everything in Team, plus:

- Unlimited automations
- Unlimited human concierge
- 24/7/365 emergency job requests

[TALK TO AN EXPERT](#)

Compare Plans & Features

Usage	Free	Basic	Standard	Advanced
Propeties/Units	1	Unlimited	Unlimited	Unlimited
Pros	Unlimited	Unlimited	Unlimited	Unlimited
Users	1	2	20	Unlimited
Automated Tasks per Unit per Year	5	20	Unlimited	Unlimited
Concierge Tasks per Unit per Year	0	5	60	Unlimited

Software Features	Free	Basic	Standard	Advanced
Instantly Book Cleaning & Maintenance Pros	✓	✓	✓	✓
Send Job Requests to Your List of Pros	✓	✓	✓	✓
Digital Checklists	✓	✓	✓	✓
Automated Backups for Your Pros	✓	✓	✓	✓
Remote Inspections	✓	✓	✓	✓
Integrate with Booking Channels & PMS Tools	✓	✓	✓	✓
No App Required! Easily Share Job Links with Pros	✓	✓	✓	✓
Mobile Apps for You and Pros	✓	✓	✓	✓
Pay & Manage Service Pros	✓	✓	✓	✓
Shared Inbox / Messaging	-	✓	✓	✓
Asset Tracking & Preventative Maintenance	-	✓	✓	✓
Inventory Management	-	✓	✓	✓
Automate Unit Access	-	-	✓	✓
Video Intros	-	-	✓	✓
Remote Inspection Video	-	-	✓	✓
Advanced Billing Rules	-	-	✓	✓
Full API Access	-	-	✓	✓
Compliance Tracking (COIs...)	-	-	-	✓
Advanced User Permissions	-	-	-	✓
SSO	-	-	-	✓

Integrations	Free	Basic	Standard	Advanced
Property Management Systems (PMS)	✓	✓	✓	✓
Booking Channels (Airbnb...)	✓	✓	✓	✓
Smartlock Devices per unit	-	-	-	Unlimited
Integrate with Smart Thermostats & Noise Alerts	-	-	-	✓
Accounting (Quickbooks, Sage, PMS) Integration	-	-	-	✓

AI / Automation Features	Free	Basic	Standard	Advanced
Flexible Automations to Automate Tasks	5 / unit / yr	20 / unit / yr	Unlimited	Unlimited
AI-Predicted Job Acceptance Probability	-	-	✓	✓
AI-Predicted Cancellation Probability	-	-	-	✓
AI-Predicted Preventative Maintenance	-	-	-	✓
AI-Scans of your Property	-	-	-	✓
Smart Standbys with Your Pros	-	-	-	✓

Payments	Free	Basic	Standard	Advanced
Send Payments to Pros (Credit Card)	3.9%	3.5%	3.0%	2.9%
Send Payments to Pros (ACH Debit) (BETA)	1.5%	1.4%	1.3%	1.2%
Send Payments to Pros (ACH/Wire In)	1.0%	0.9%	0.8%	0.7%

Human Support & Service	Free	Basic	Standard	Advanced
Concierge Team for Software Support	✓	✓	✓	✓
Concierge Tasks for Automation per Unit per Year	-	5 / unit / yr	60 / unit / yr	Unlimited
Dedicated Account Manager	-	-	✓	✓
Quarterly Data-Science Review	-	-	-	✓
Full Automation	-	-	-	✓

Enterprise customer? Need something custom?

TALK TO SALES

FAQs

What pros can you instantly book?

You can instantly book any pro who you add to your account or who uses TIDY to manage their business. All pros you book are either ones you added or independent businesses using the TIDY software (note: we never work with "gig economy" workers).

What is pricing like for jobs you book?

You can add jobs with your pros at any price you like. However pros must agree to the price. If sending a request, we will try to give you AI suggestions on the probability of acceptance, but those are just based on averages. If you ever have pricing questions, talk to our concierge for help with set up.

What is an automated task?

An automated task is an automatically triggered event you have set up in your account in the "Automations" section. For example, automatically sending a job request when a customer has booked a reservation at a property is 1 automated task. Automated tasks can be used across properties. So if your plan allows 10 automated tasks per unit per year, and you have 10 units, then you get 100 automated tasks per year. You can use those across 1 property or all properties. So instead of upgrading a plan, it may make sense to add another property.

What is a concierge task?

A "Concierge Task" is something done by our human team, done manually or as a part of an automation. It must be remote and typically take less than 10 minutes. Examples include:

- Manual confirmation calls. Our concierge can call and confirm a pro is doing a job. 1 call would be 1 Concierge Task.
- Reviewing Before & After photos. 1 review would be 1 Concierge Task.
- Manually update data in your PMS. If you want something updated that can't be done programmatically, have the concierge do it! 1 set of updates would be 1 Concierge Task.

Are tasks per unit or flexible to be used across all units?

Your tasks are flexible, meaning if you have 10 units and your plan gets you 60 tasks per year, then you would be able to use 600 tasks across all properties/units. In this example, if one unit uses 500 tasks, and the remaining units use 100, then you are still at your 600 limit, no problem.

What happens if you go over the number of automated tasks?

Your first 90 days, we give you unlimited tasks so you can figure out what is best for you. After that, if you go over, we will let them go through and notify you. If you consistently go over after warnings, we will upgrade your plan. Our goal is for no surprise bills!

What happens if you go over the number of concierge tasks?

We will let you know that you are out of tasks for the month. Talk to sales if you need more flexibility than is in your current plan.

What is available in the US vs other countries?

All features are generally available to all countries except for payments or using our ops team to find pros.

How do payment processing fees work?

Payment processing fees apply when you pay an invoice from a pro by ACH or Credit Card. You do not need to use our payment system, and can pay pros any way you like. You are only assessed a fee for payments when they use our ACH/Credit Card system.

TIDY can create **\$3,000** in value per property, per year.

The more features you use, the more you save.



We can save 1 hour per turnover in coordination. Est. value: **\$1,300/property/yr.**



We can save 20 hours per year in maintenance planning. Est. value: **\$800/property/yr.**



Preventing 1 no-show a year would save a booking. Est. value: **\$500/property/yr.**



Saving 1 negative review per year that hurts your business. Est. value: **\$300/property/yr.**



Compliance tracking typically takes 3 hrs per vendor. Est. value: **\$120/property/yr.**



Included home manager software like Upkept. Est. value: **\$60/property/yr.**



Our suggestions are expected to save 1 repair a year. Est. value: **\$240/property/yr.**

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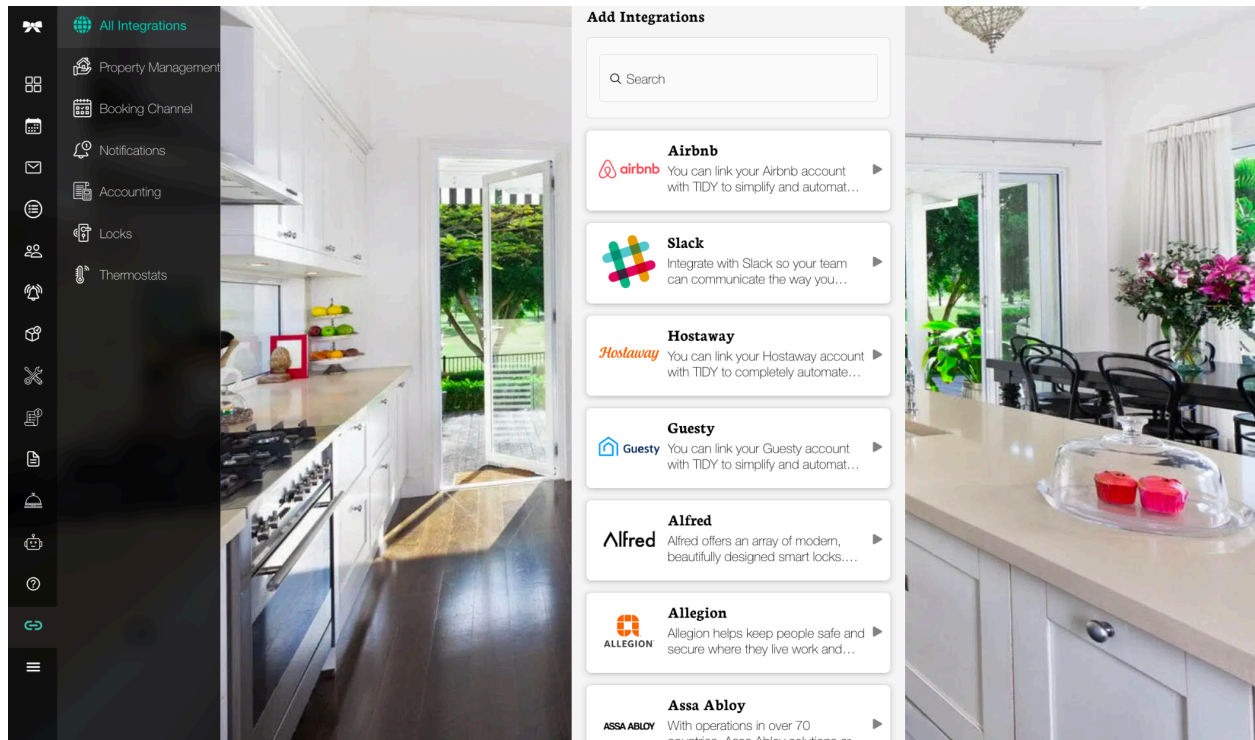
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Managing cleaning and maintenance is incredibly complex, requiring a large number of features. We continue to build features for property management customers as requested to satisfy their needs.

TIDY features for Property Managers: Walkthrough

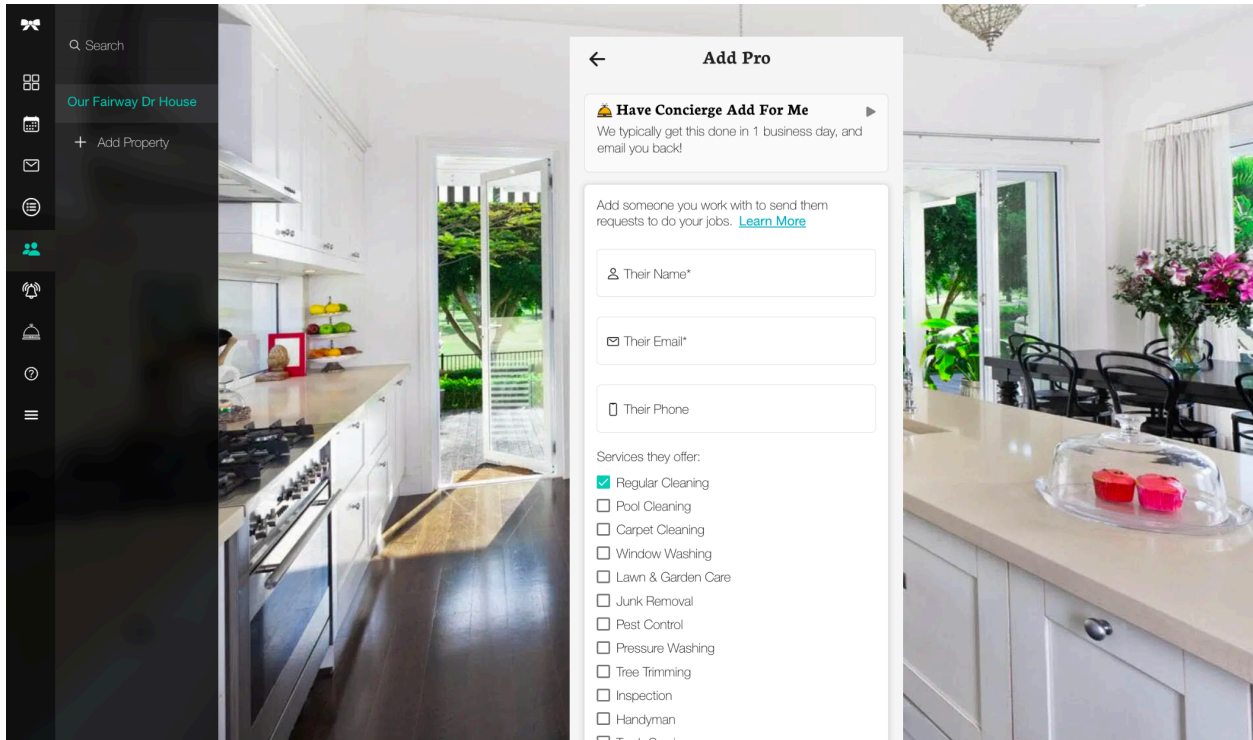
To help visualize how TIDY works and how Property Managers control and set up their cleaning and maintenance programs, we will walk through a series of website and app screenshots of common property management workflows. Typically most property managers will use the software in the following way.

Property managers typically connect a data source.



Once this data source is in, TIDY pulls in a list of properties and guest/tenant information from the source to populate the application. Property information helps managers stay in sync with other platforms (most customers have some other tool to help them with guest/tenant management). Guest/tenant information such as check-in/check-out or move-in/move-out is helpful to create automated workflows to send job requests to your pros. For example, customers turning over a property after a lease expiration will typically want to automate a series of jobs to complete the process, typically something like: inspection, followed by handyman, painting, any miscellaneous specialty repair, carpet cleaning, and regular cleaning.

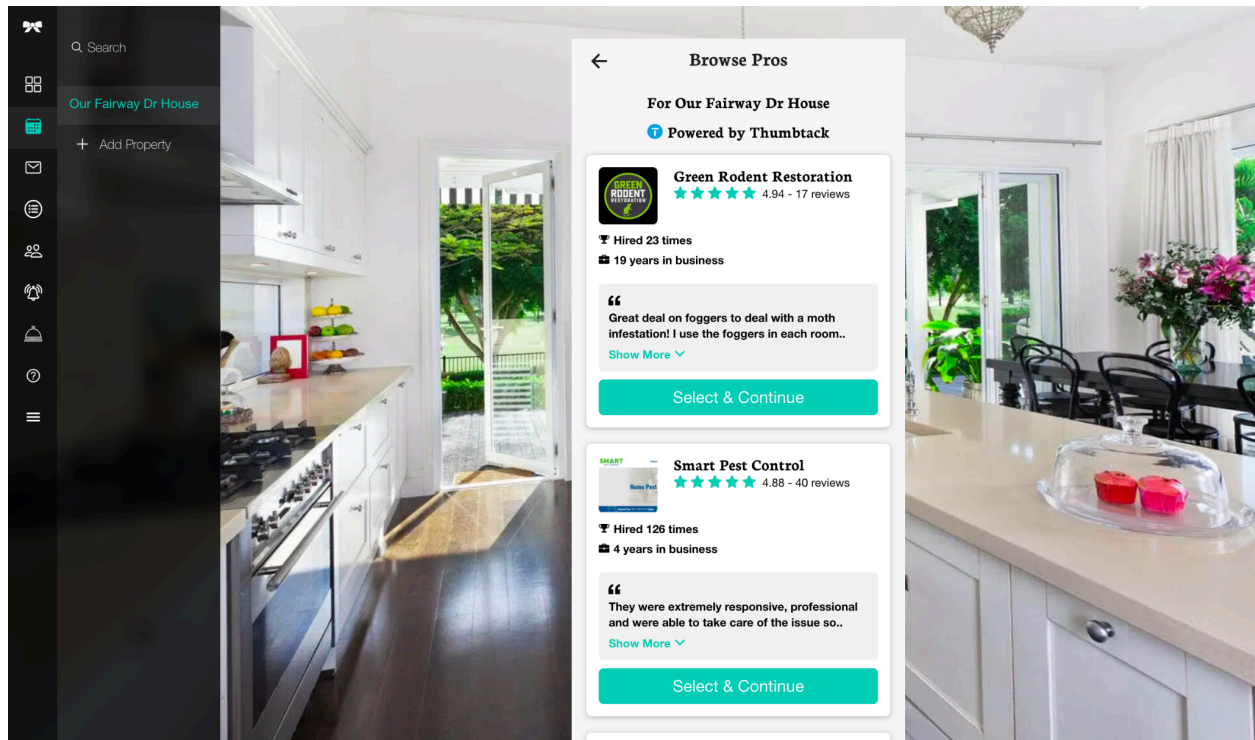
Next, property managers will typically add in all the pros they work with for cleaning and maintenance tasks.



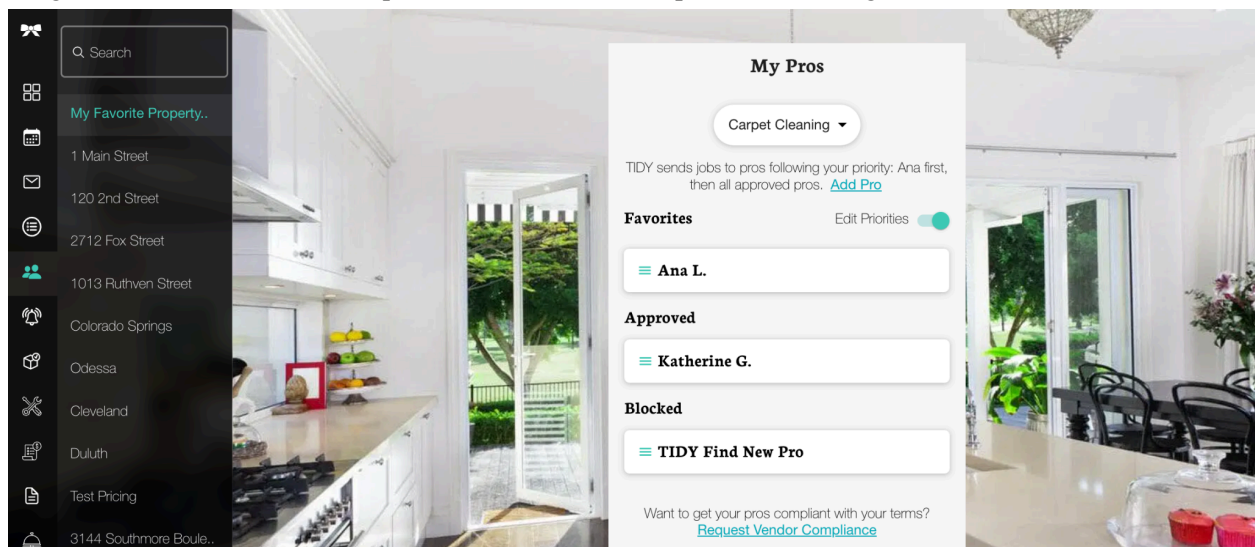
My Pros Q Search + Add Pro Find New Pro Settings				
Name	Properties	Services	Last Job	Next Job
Guam3 Three	My Favorite Property	Pool Cleaning, Biohazard Cleaning, Handyman		
Ana Lopez	1 Main Street, 120 2nd Street, My Favorite Property + 7 more	Handyman, Cleaning, Inspection, Carpet Cleaning		
Rodrigo Lopez	1 Main Street, My Favorite Property, 555 California Street	Painting		
Martha Washington	120 2nd Street, My Favorite Property	Cleaning, Pool Cleaning	2/10/24 9:30pm	3/9/24 9:30pm
Guam10 Ten	My Favorite Property	Pool Cleaning		
Angelina	My Favorite Property	Cleaning		
Test Prod Test	1 Main Street, My Favorite Property	Inspection, Cleaning, Trash Service		
Paula Fiuzza	1 Main Street, 3144 Southmore Boulevard, Miami	Cleaning		
Shalonda Priester	1013 Ruthven Street	Plumbing		
Beatriz	Odessa	Handyman		

We generally recommend that they add pros for all services they might want or need ever, even if they don't think so right now. If they don't want to work with a given pro again, we recommend adding them and marking them as blocked from future work. This way, the whole team can be aware of that pro's status as blocked.

If they need pros, they can browse what is available through pros on TIDY or third-party tools such as Thumbtack.



Then for each property, they can specify the order in which pros should get job requests. When ordering things, this indicates how the requests should flow to the pros, like an eSignature.



Property managers can also edit in a grid view across all their properties and pros exactly what they want the default rate to be for them, the autopay limit for invoices received by the pro for a property/job, and what the job should be called for them. This is useful because sometimes it is hard for clients to match what pros call jobs to how they think of jobs. For example, a “move out inspection” for a client might

match what Ana calls “Ana’s Standard Inspection” and what Bob calls “Turnover Inspection”. Each party can adjust the name to minimize confusion.

Q Search

My Favorite Property

1 Main Street

120 2nd Street

2712 Fox Street

1013 Ruthven Street

Colorado Springs

Odessa

Cleveland

Duluth

Test Pricing

← Pro Settings

Select Field(s) to Edit

Edit Service Name

Edit Default Rate

Edit Autopay Limit

Save

<input type="checkbox"/>	Pro	Property	Service Name	Default Rate	Autopay Limit
<input type="checkbox"/>	Alex	My Favorite Property	This is a Handyman Service	\$0	\$100
<input type="checkbox"/>	Ana Lopez	1 Main Street	Handyman	\$0	\$100
<input type="checkbox"/>	Ana Lopez	1 Main Street	Handyman Services	\$0	\$100
<input type="checkbox"/>	Ana Lopez	555 California Street	Handyman	\$0	\$100
<input type="checkbox"/>	Ana Lopez	555 California Street	Handyman Services	\$0	\$100
<input type="checkbox"/>	Ana Lopez	555 California Street	4 hour cleaning	\$90	\$100
<input type="checkbox"/>	Ana Lopez	555 California Street	2 person team cleanings	\$140	\$100
<input type="checkbox"/>	Ana Lopez	555 California Street	1 hour cleaning	\$34	\$100

Property managers can specify any specific compliance requirements they may have. For example, if a client wants to ensure a pro has general liability or workman’s comp insurance, they can set that up. Then, before pros can work with the client, they must upload the requisite proof. If clients then wish to offer exceptions, they can.

Properties

Account Settings

Job History

Users

Teams

Billing History

Automatic Booking

Accounting

Vendor Compliance

Payment Options

Developers

Documentation

Cancellation

Your Branding

Logout

Vendor Compliance

Add your coverage requirements

Certs/COIs/ACORD 25s. We also help you manage other vendor requirements (W9s, Attestations, and other contracts).

We automatically check coverage

We automatically notify vendors of your requirements, collect proof, and alert you of any issues.

It's free

It is just one of the ways we help you manage your property cleaning and maintenance.

Requirements

What type of requirements do you want to implement?

☐ Insurance

☐ Training/Certification

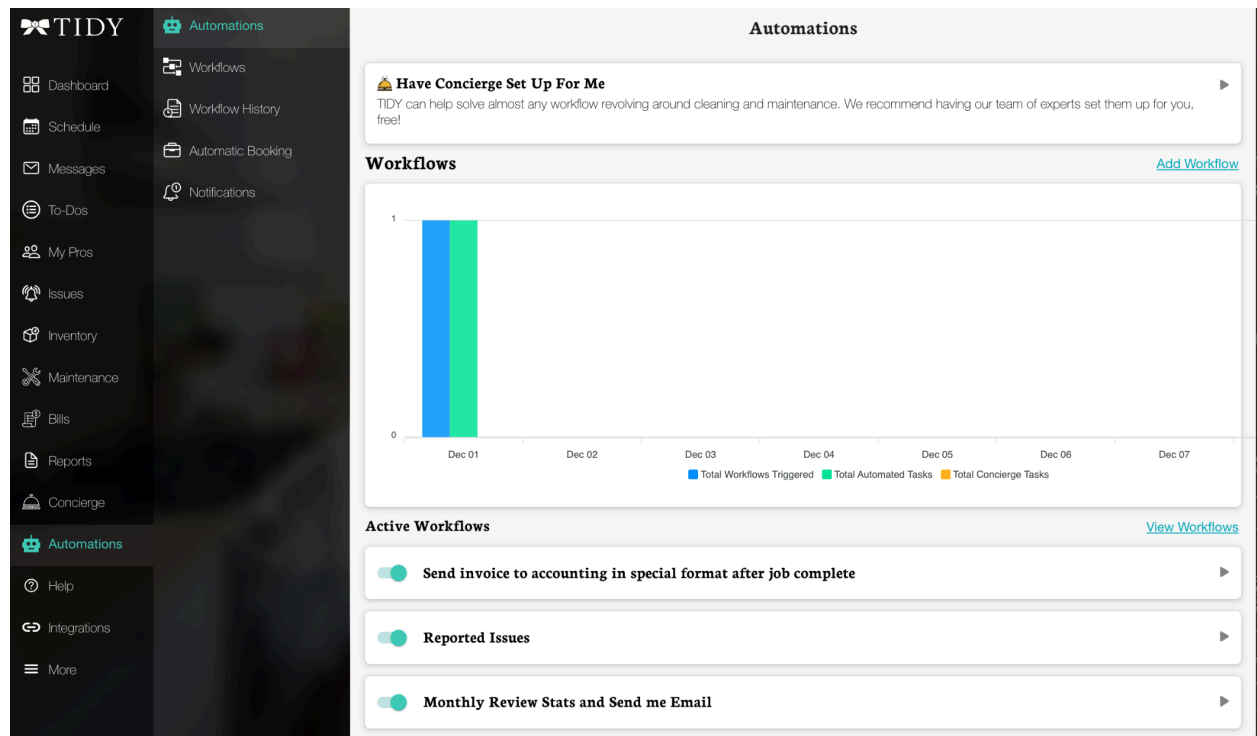
☐ Background check

☐ Document signing (e.g. NDA)

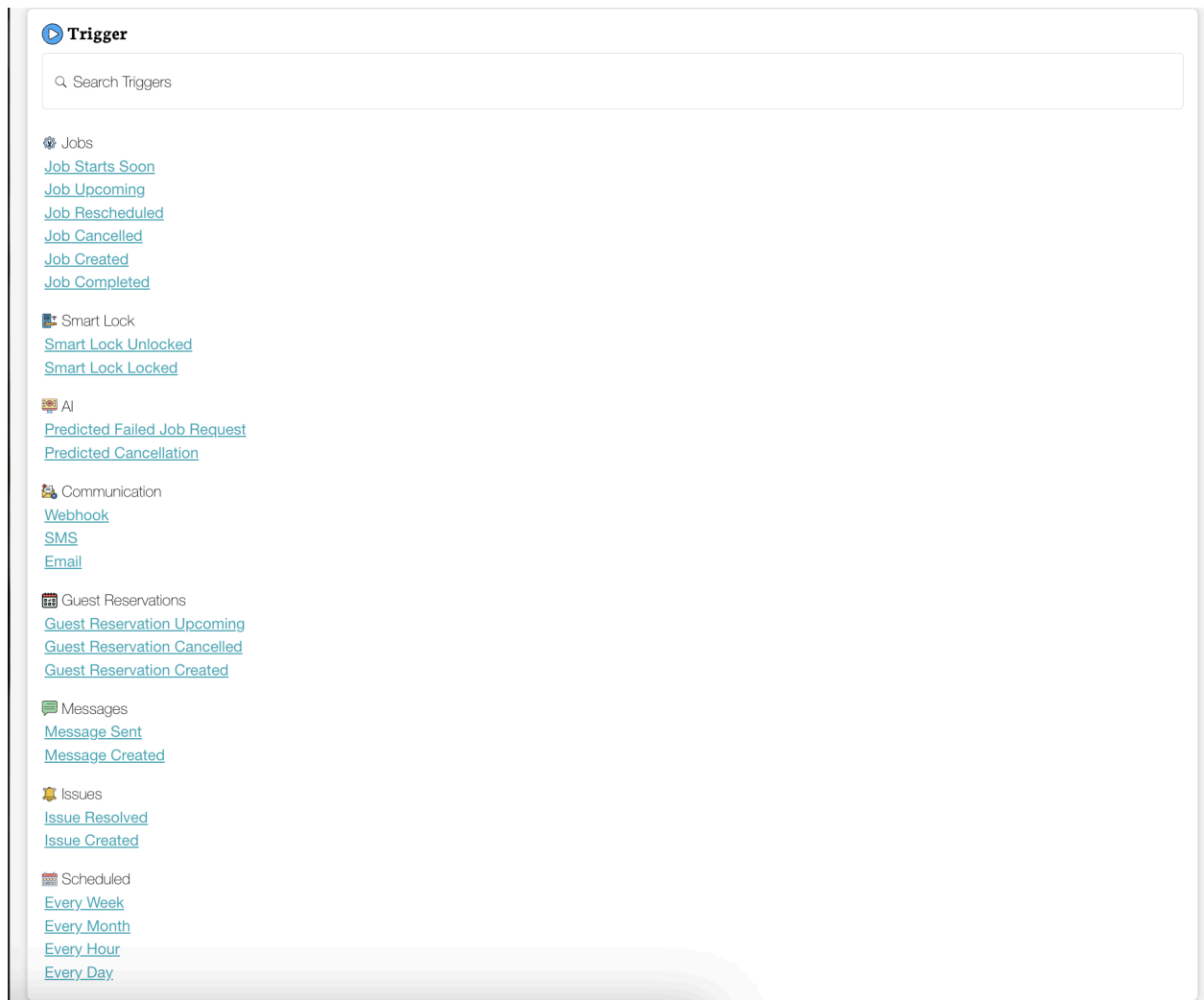
☐ Licenses

Enable Requirements

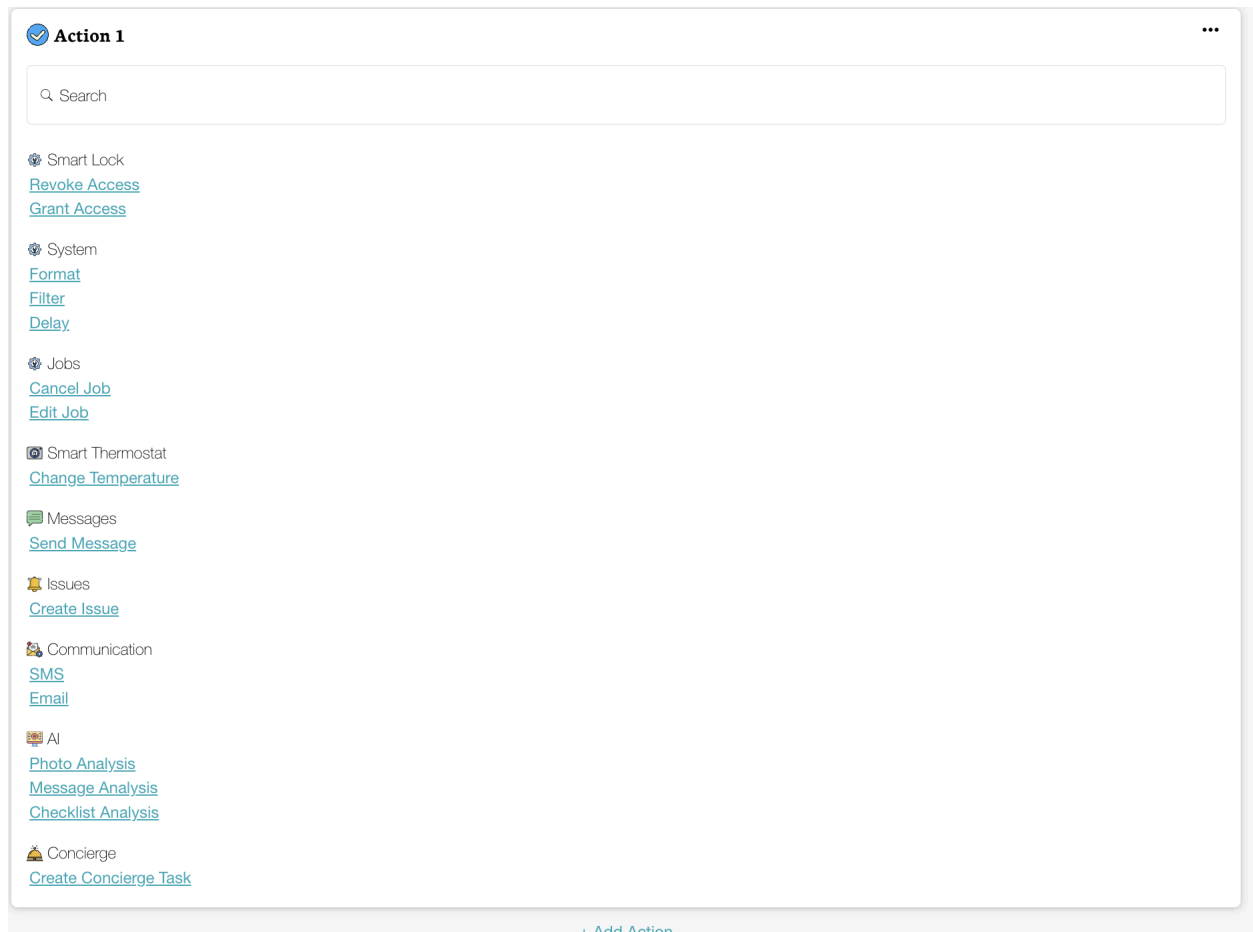
They set up automation to run jobs the way they want, using triggers and actions to specify rules on the job, or between the jobs.



Workflows are key to our value proposition; almost every customer uses workflows. Many are very unique. These are set up by first establishing a triggering event,





and this triggering event creates an action of some kind.



By using workflows, property managers can exercise precise control over what kinds of things they want to have happen.

Here is an example of a common kind of workflow. In this example, a workflow is triggered when a job is triggered on a specific property “Bedford” for the job category of “Junk Removal”. In this case, the action created is actually a “Concierge Task”. In this case, it's a request to contact their pro bob when the job is created, perhaps because they only accept jobs via phone. Concierge Tasks are flexible as they go to our team of humans. They can be any task that (a) relates to cleaning and maintenance (b) is done remotely (c) takes less than 5 min on average, and (d) is very well defined by the property manager. This example could be more clear about what should happen if they say no, don't pick up, etc.

 **Trigger**

 Job Created

This triggers when a job request is created.

Trigger Filters

These can narrow when a trigger fires.

Property Filter:

☐ Trigger on all properties

☒ Trigger only on some properties

Properties

Bedford


Category Filter:


☐ Trigger on all categories

☒ Trigger only on some categories

Categories

Junk Removal

 **Action 1**

 Create Concierge Task

Subject

Contact my pro Bob

Task Description

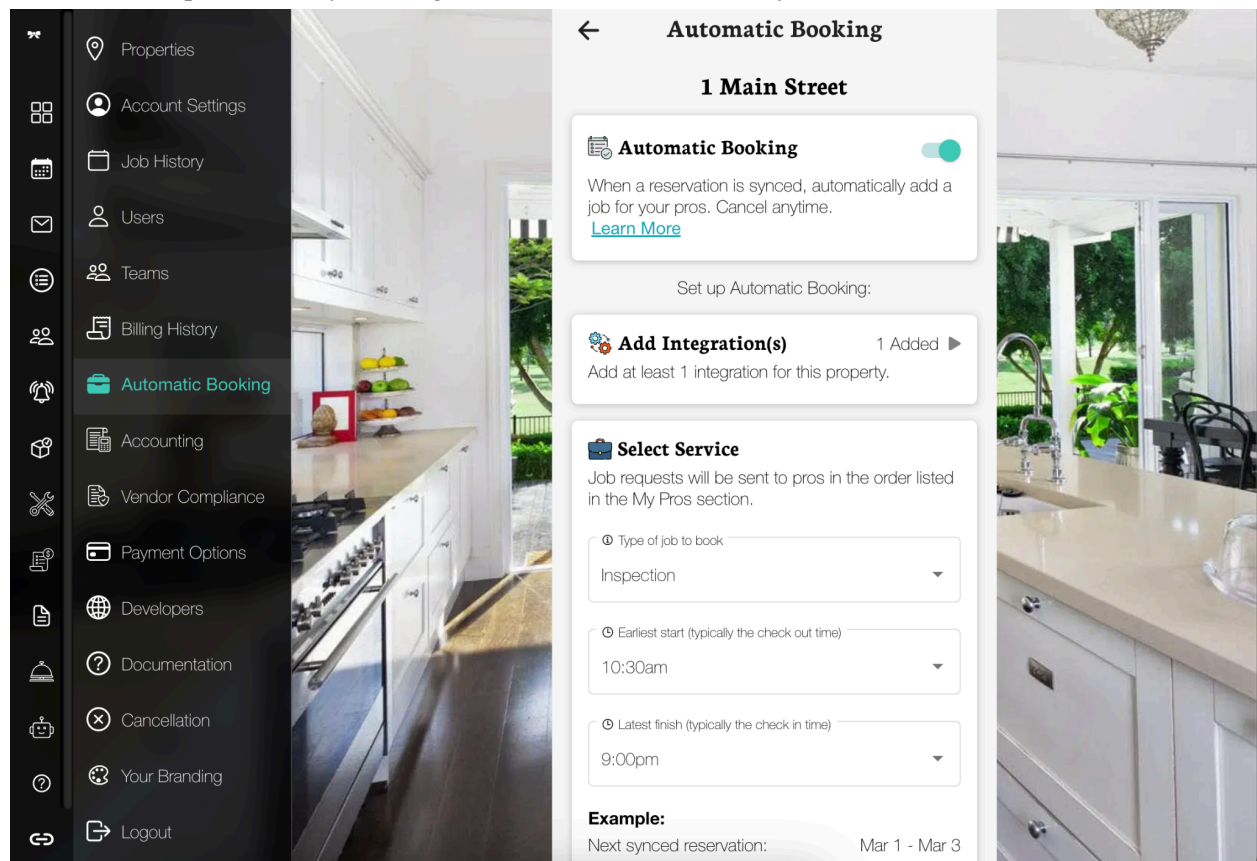
Contact my pro Bob Smith (I added him to my account), and ask him to do my junk removal job on at our agreed upon \$400 rate and our standard contract. Here is job info:

Job Current Start Date

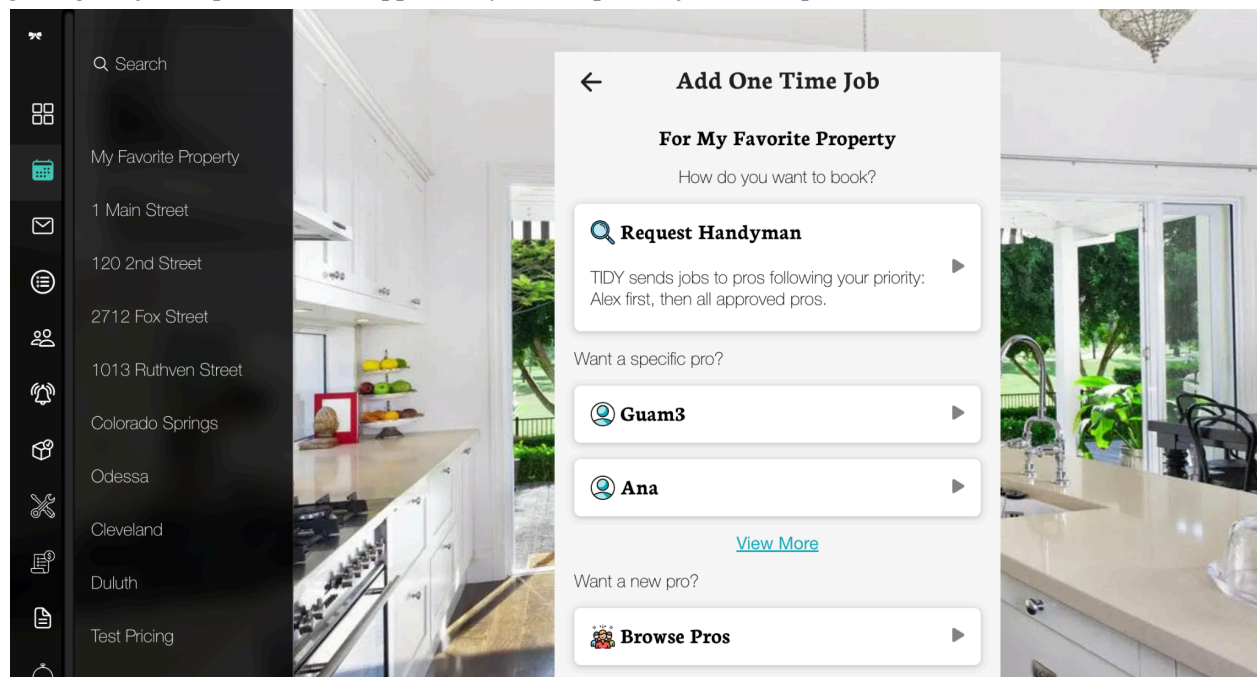
Address ID

Add outputs from the Job Created trigger ▼

Additionally, the client may want to set up automatic booking requests, which allows them to initiate various requests automatically based on rules. For example, a short-term rental customer may want to schedule an inspection every time a guest checks out automatically.



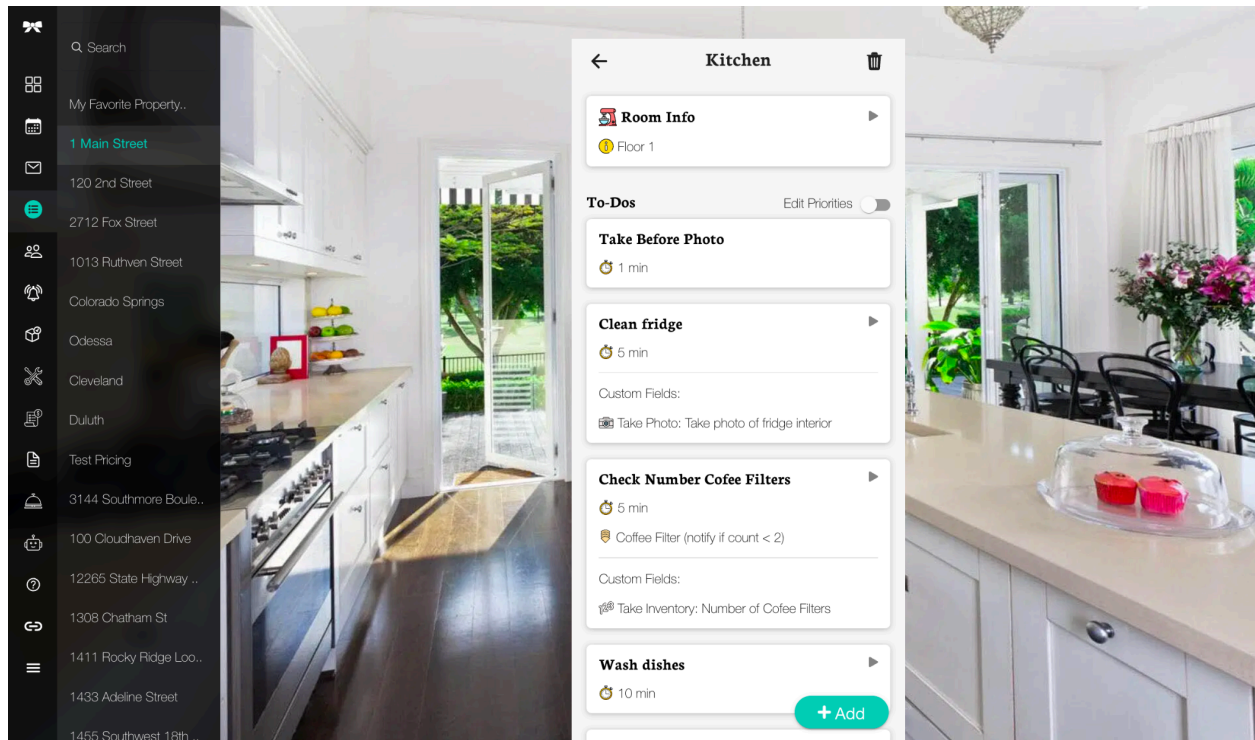
Property managers can also manually make job requests, sending them either to a specific pro or to their list of pros in the order specified in the “My Pros” section. This acts a bit like an eSignature, with the pros getting the job request and the opportunity to accept or reject the request.



Requests made by property managers appear on their schedule so they can track everything across all categories, including tracking: which jobs are still not accepted by their pros, which pros have accepted jobs, when guests/tenant actions are occurring, and other key pieces of information they may want to know.

	Schedule <input type="text" value="Search"/>	Filter	Book Job(s)
	◀ Feb 24 - Mar 2 ▶		
	Properties	Saturday ▲ February 24	Sunday February 25
	My Favorite Property Next Check In: None Next Job: Feb 26		John Smith 3:00pm Sched
	1 Main Street Next Check In: None Next Job: Feb 26		Plumbing Issue R.. Feb 26 8:00am - Feb 27 10:00am
	120 2nd Street Next Check In: None Next Job: None		

Property managers can create digital to-do lists that are extremely detailed and powerful in what can be requested. Customers can ask the pro to take inventory, take before/after photos, or give them instructions with photos or videos on how to access things or find things. Ultimately, this list is a guide for the pro to use, combined with their professional judgment, and every client has unique lists. They can create lists for each property and job type, and managing the lists is a critical value we provide. The data from these lists can then be recorded and audited over time. For example, reviewing inspections you may want to see how various reported issues have changed over time.



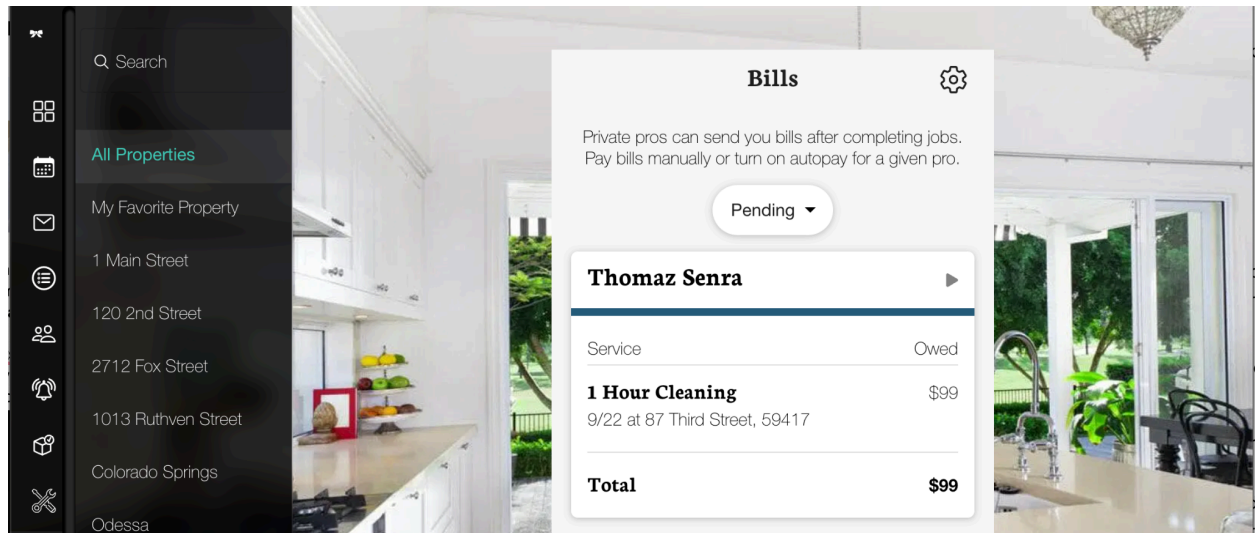
Specifically, when pros fill out data on the quantity of any item, this can be used for property managers to do inventory tracking. Inspectors most often use this, but sometimes its done by other service types as well as a part of their digital to-do lists.

Property	Item	Current #	Min #
My Favorite Property in Fountain Valley	Oven	1	1
My Favorite Property in Fountain Valley	Refrigerator	1	1
My Favorite Property in Fountain Valley	Plate	14	12
120 2nd Street	Plate	14	10
My Favorite Property in Fountain Valley	Soft Toilet Paper	10	5
1 Main Street	Coffee Filter	4	2
1 Main Street	Dishwasher Detergent	5	2
My Favorite Property in Fountain Valley	Garbage Bag	5	5
My Favorite Property in Fountain Valley	Plate	12	12

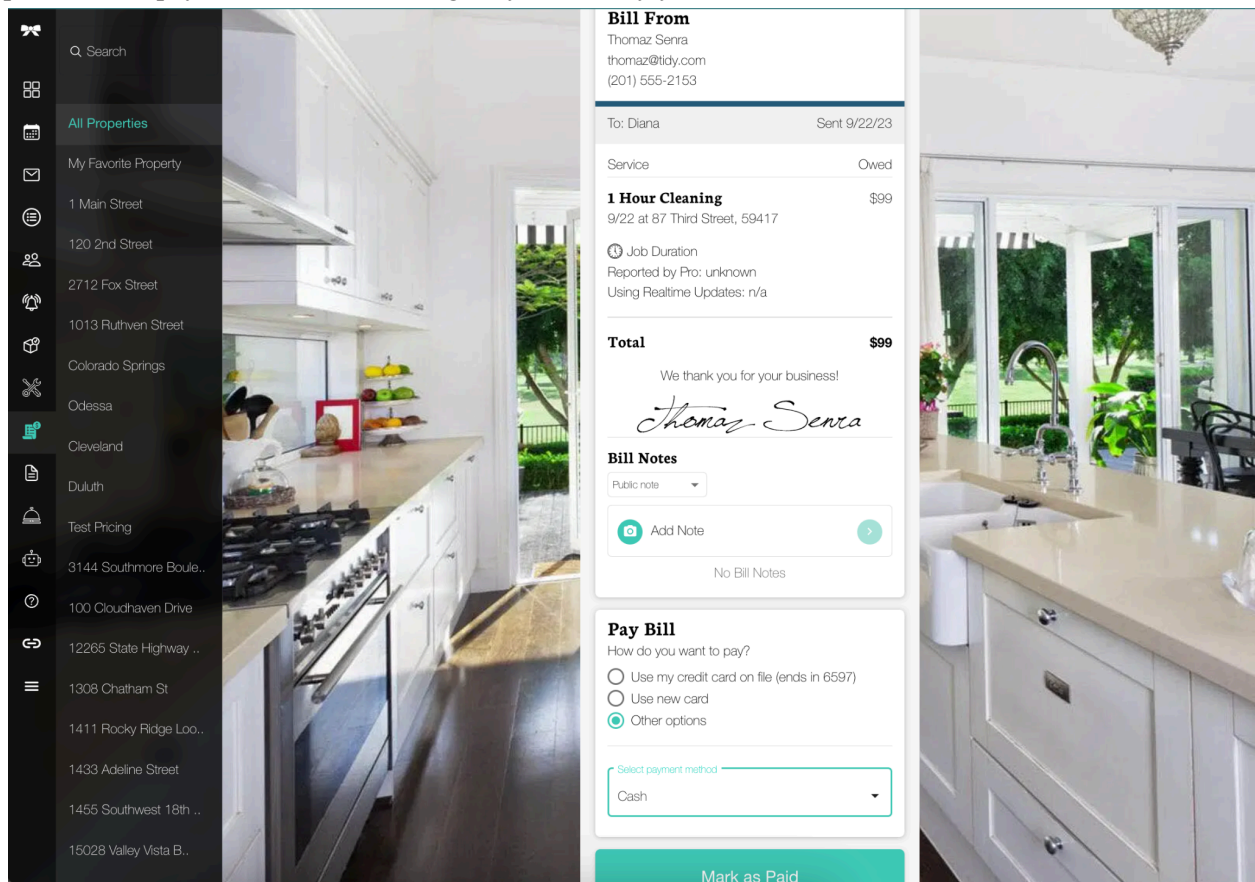
Property managers can track issues on the TIDY issue board. This board is useful for tracking things like emergency maintenance requests from guests/tenants, converting them to work orders, and tracking their statuses. Typically, customers use “Reported” to mean, “someone told us about the issue”. They can then approve it, which typically means it's ready to be scheduled. Then, when it's scheduled it is listed as “In Progress” and associated with jobs. When all jobs associated with an issue/work order are complete, typically, it's updated to “Done”.

Reported (1)	Approved (2)	In Progress (1)	Done (1)
Low Inventory 1 days ago 2584 Fairway Drive	Damage 0.02 hours ago 1 Makefield Road	Pest Report 0.01 hours ago 1 Makefield Road	Utility Issue 0.01 hours ago 1 Makefield Road
	Other 0.00 hours ago 1 Makefield Road		

The Bills section is where property managers can see invoices come in from pros. They can track their statuses of what is pending or paid.



Invoices/bills can include a description of the task, the job duration using any relevant updates, as reported by the pro, notes, and reimbursement requests. The bill itself allows customers to select from the available payment options provided by the pro, and complete the payment online or mark that it has been paid. Not all payment forms can be digitally tracked by you can track it.



Property managers can review an overview of each property from the properties page. From that page, property managers can add assets to track.

Properties

Account Settings

Job History

Users

Teams

Billing History

Automatic Booking

Accounting

Vendor Compliance

Payment Options

Developers

Documentation

Cancellation

Your Branding

Logout

← Property Details for

My Favorite Property ▾

Scheduled Jobs

▶

Next: Tue 3/5 at 8:00am

Past Jobs

▶

Pro	Service	Date
Katherine	Plumbing	2/13 8:00am
Martha	Cleaning	2/10 9:30pm
Katherine	Tree Trimming	2/6 8:00am

Logged Issues

1 unresolved ▶

Bills

▶

Pro	Service	Date	Owed
Thomaz S.	1 Hour Cleaning	9/21/2023	\$99

Pros

Pro	Service
Guam3 T.	Pool Cleaning, Biohazard Cleaning, Handyman, Cleaning
Ana L.	Handyman, Cleaning, Handyman, Cleaning, Inspection, Handyman.,
Rodrigo L.	Cleaning, Cleaning, Cleaning

To-Do Lists

▶

christestlist2

christestlist

asfasdfdf

Next Scheduled Maintenances

Access Notes

[Edit](#)


How to park: Free parking in guest parking. You can park in front of the house right next to my garden

How to get in: No access notes added.

How to close up: Leave the key under the doormat again.

Property Map

Exterior ▾



Rooms

[Edit Rooms](#)

>

Pool

▼

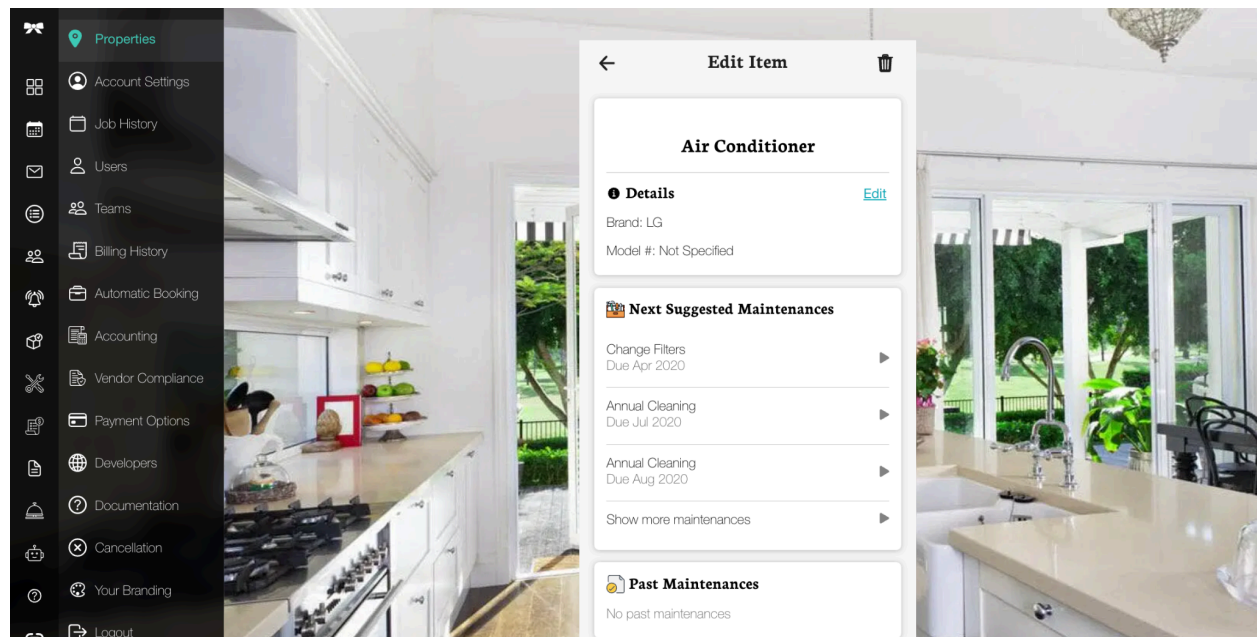
Home Office

Air Conditioner ▶

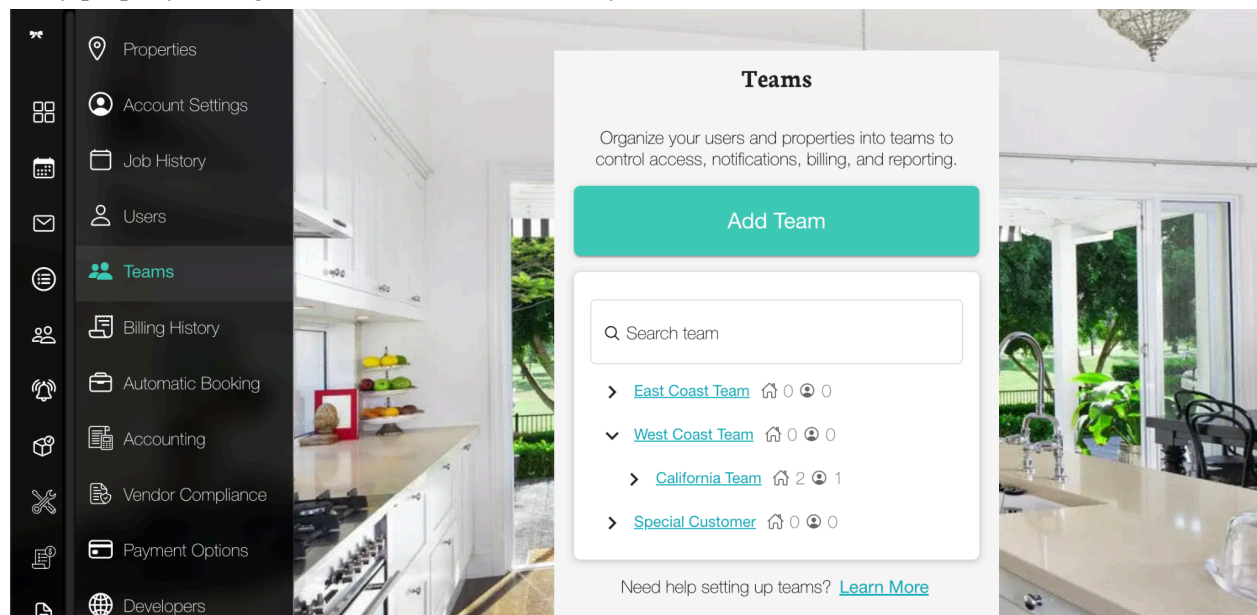
Smoke/CO Detector ▶

Coffee Filter ▶

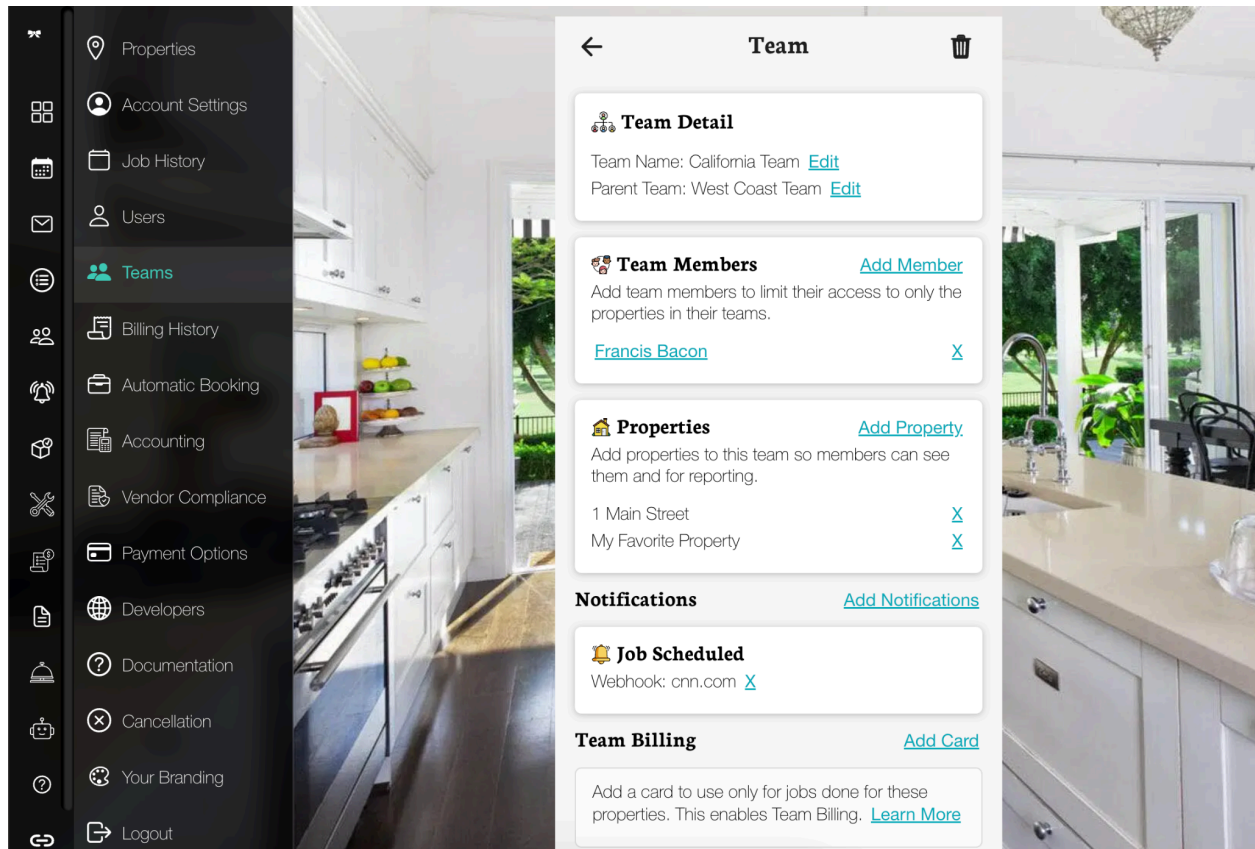
Each asset can have maintenance schedules that pop up and are controlled by the client to specify what should be done and when. You can track maintenance over time.



Many property managers work with teams internally as well as with their customers.



Teams are a bit like a “permission group”, meaning you can add people to only view activity at a limited subset of properties. Billing rules and notifications can be set up separately for the properties in a team. Most commonly, this is used by property managers who want to grant their owners limited access to their account, to only see their property status and not all properties.



Every aspect is ultimately under the control of the customer, from vendor selection, compliance, job allocation, task management, rate/contract management, and more.

How Jobs are Created Between Property Managers & Pros

Pros and Property Managers create jobs to work together. For example, a pro can log a job done for one of their clients or vice versa. Since TIDY's goal is to become the dominant way both home service pros and property managers manage their jobs, then TIDY has to support a huge range of use cases between the parties. The table below lists the ways that pros or property managers can create jobs with each other:

Job Creation Method
Property managers assign pros directly to jobs in their system.
Pros create jobs and assign them to property managers directly in their system.
Pros send a proposal to a property manager, who can accept.
Property managers create a job and send a request to their list of pros for someone following their workflow to accept the job. Optionally, they can set a max price to request bids from new pros in a process called "Find New Pros".
Property managers send requests to an individual pro to accept.

Property managers can book a service from the pro's website at that pro's listed rate for the service if the pro's settings allow it.
Property managers via third-party integrations can request quotes from pros.
Property managers can browse pros in their area and then book them via their website.
Property managers can browse pros in their area and then book them via 3rd party websites.

In every case, the pro and the property manager control completely the assignment and scheduling. TIDY is simply the software tool they use. In fact, TIDY is expressly disallowed from assigning or reassigning jobs per the Service Provider Customer Agreement and Property Managers Customer Agreement.

By volume, the most popular methods are the property manager booking the pro via the pro's website, the pro receiving a request from a property manager and then accepting, or a property manager assigning them to a job.

How does the process work for property managers to find new pros?

In the vast majority of cases, pros and property managers have an existing relationship, and they are using the TIDY software to communicate and track things. However, in some cases needs additional help, and then they have 3 ways to get help:

- Property managers can browse pros in their area to find their website, then book them via their website, OR
- Property managers can use a connected tool like Thimbtack, OR
- Send a request out to pros using the TIDY software and collect bids in the process called "Find New Pros".

In the first two cases, the property manager picks the pro that works best for them, views their listed pricing, and books them. It's relatively simple and similar to booking a restaurant at Opentable.

In the third case, when sending a job request, here is how it works:

- The property manager sets a total target price for getting the job done, and a strategy/algorithm that they want to employ with their pros. Options include "Send to All Eligible", "Send in Order of Positive Review Percentage" and others at their control. All options for decision-making are under the complete control of the two parties using objective measures. TIDY does not apply any of its own input.
- Pros set up their requirements to screen out requests they don't want. For example they can screen by time, location, service type, what needs to be done, and more. Pros are quite discerning, with less than 4% of all requests clearing a pro's filters.
- Pros view jobs to bid on them. On average, less than 20% of job requests that match a pro's filters are bid on by the pro.
- They bid by their rate, and clients also see their reviews and other objective scores.
- If a pro bids at or below the property manager's target price, they typically win the job on a first come, first serve basis, subject to the property manager's approval.

- If multiple pros bid quickly, it goes to an auction with the winner determined by the client's selected strategy. They can choose to either allow the higher quality one to win, or the lower price one.
- If there is no pro who bids at or below the property manager's target price, then the job is never filled for the property manager.
- Once a pro has a job, they can delegate it to subcontractors or employees.

This process is outlined in the property manager documentation is at help.tidy.com, the pro documentation at help.tidy.com/pros and in their software. Because each property manager and pro have unique preferences, the process for finding new pros is deliberately designed to be under the complete control of these two parties.

TIDY is contractually barred from assigning.

TIDY expressly disallowed from assigning jobs. In section 6.1.d. of the Service Provider Customer Agreement, it states "TIDY shall not have the right to take away any Service Provider's Client at any time. Only Clients or Service Providers can determine pairings." In 4.b of the same, it states further restrictions on TIDY's actions such as "TIDY shall be prohibited from showing to your Clients other Service Providers who may be able to complete the same service type, unless at your Client's specific request." These contractual limitations are not hard for TIDY to comply with, as they match it's business model.

TIDY does not gain financially from any kind of control over pros or property managers, so does not get involved in "assignment". Attempting to do things against the will of property managers or pros would be a bad thing. So that is why we do not have a software function for TIDY to assign jobs, and we don't get involved in pairings, we leave that to the property managers or the pros.

Summary: Service Work is Done Solely by Pros on Behalf of Their Property Managers

In summary, TIDY helps each party manage their administrative tasks. For the vast majority of pros and property manager uses, TIDY does not get any economic benefit for most ways the parties use the software. This is both in contract by all parties, who all agree this is the case, as well as in practice. TIDY provides no material benefit to the service work itself.

No Control

As TIDY is designed to attract genuine professionals only, we do not attempt to exert any control over the services provided and leave those matters to clients and pros themselves.

TIDY Has No Business Interest In Controlling Pros

TIDY's goal is to get a large portion of property managers and service providers to use our tools to get things done. Across these wide ranges of businesses, things are always done very differently. No two property managers or service providers do things the same way.

If TIDY were to attempt to exert control and form some kind of opinion about how things should be done, it would actively prevent us from serving the majority of the market. There is no apparent advantage for us to be involved at all.

To get parties to trust us to run their businesses, TIDY takes the extra step to contractually bar ourselves from controlling things in each party's agreement. Since we don't control things nor take an interest in controlling things anyway, this is designed to make both property managers and service pros comfortable that we will never control things. TIDY is actively assuming contractual risk, allowing parties to litigate if they ever feel we control transactions.

Pros Exert Control

In practice, TIDY does not exercise any control over any jobs. In the software, pros can:

- Specify the services they provide, with almost no limit and completely customizable in the "Services" section.
- Delegate jobs to subcontractors or employees at will. In the app, you can find the ability to manage a team in the "Teams" section, and the ability to delegate jobs. TIDY is
- Use any equipment.
- Control their own schedule. The app allows pros complete control of their schedule, in the "Schedule" section.
- Control where they work. The app lets them easily set service areas and specify where they want to work.
- Select the clients they wish to work with. Pros can send clients proposals, manage agreements with clients, assign clients, block clients, and more. Sections with these features include "Clients" and "Proposals".
- Set their own pay rates. Pros set the rates for their services in the "Services" section. This adjusts their default rates. But they can change their rates for specific clients on a specific proposal both contractually (in section 6.2) and in practice.
- Set their own contract terms. They are able to upload a contract for use with any proposal.
- Set their own payment methods.
- And other features as shown in the previous section.

Section 3 of the Service Provider Customer Agreement codifies TIDY's contractual relationship and clearly ensures that both parties agree TIDY is unable to control pros:

- Section 3.a clearly states what control pros have: *"TIDY shall not control or have any right to control the manner or means by which Service Provider performs its Services, including but not limited to the time and place Service Provider performs the Services, the types of Services offered, the Jobs Service Provider selects, the rates the Service Provider charges, the tools and materials used by Service Provider to complete the Jobs, the helpers, assistants, subcontractors or other*

personnel used by Service Provider in completing Jobs, or the manner in which Service Provider completes the Jobs. TIDY will not and has no right to, under any circumstances, inspect Service Provider's work for quality purposes."

- Section 3.b. indicates: *"Service Provider is not obligated to personally perform the Services."*
- Section 3.d. States: *"TIDY shall have no ability to assign jobs to Service Provider; this right is exclusively reserved for Clients or Service Providers. You can control your assignment strategies via the software by customizing your settings."*
- Section 4.d states: *"Each Service Provider, as a separate entity from TIDY, is solely responsible for all customer service issues relating to such Service Provide and the Clients of their Services, including without limitation, issues related to Services, pricing, order fulfillment, returns, refunds, rebates, or warranties."*
- Section 5 clearly states that TIDY is not involved in contracting terms between the parties: *"Client and Service Provider have complete discretion both with regard to whether to enter into a Service Contract with each other and with regard to the terms of any Service Contract"*.
- Section 6.2. states the pro has the right to set pricing anytime.
- Section 4.4 states the pro has the right to cancel jobs at any time.

The powerful features available to pros and the contractual arrangements between the parties make it clear: Pros retain complete control over jobs, except as limited by their property managers.

Property Managers Also Control

Obviously, pros don't retain exclusive control. Property managers also control jobs by specifying:

- Which pros they want to use. They can add pros, specify the order they want to work with people, set up rules for automated search, and more.
- What services they want to accept from a pro.
- What they want to pay for services.
- When they want jobs done.
- Where the work is done.
- How they want jobs done. How jobs are done is ultimately a form of negotiation between property managers and pros. Property managers can create detailed to-do lists, and pros can follow them or use their professional judgment.

In addition to the control they have in the app, Property Managers must sign the Property Managers Customer Agreement or similar agreement. Their control is contractually codified there, with highlights including:

- From section 1: *"TIDY does not take part in any interaction between Service Providers and Property Managers. TIDY does not have control over the quality, timing, legality, failure to provide, or any other aspect whatsoever of any Services provided by any Service Provider; including any Service Request sent via TIDY, nor of the integrity, responsibility or any of the actions or omissions whatsoever of any Property Managers or Service Providers. TIDY does not have control over the quality, timing or legality of Services delivered by Service Providers. TIDY makes no representations about the suitability, reliability, timeliness, or accuracy of the services requested and provided by Property Managers or Service Providers identified through the Service*

whether in public, private, or offline interactions.

At no time does TIDY provide any in home service offered by Service Providers, TIDY solely provides software for use by Property Managers and Service Providers. For example, TIDY does not offer cleaning, window washing, carpet cleaning, lawn care, HVAC services, or other physical, in-home services."

- From section 2a: *"Property Managers book and manage Service Providers directly. Each Service Provider has represented and warranted that they are an independently established business entity and no Service Provider has been engaged by TIDY to perform services on TIDY's behalf."*
- From section 2c: *"Property Managers are responsible for determining their proper status with respect to Service Providers, including whether they are employees of the Property Manager or not. Under no circumstances shall any Service Provider shall be considered an employee of TIDY."*
- From section 2d: *"TIDY shall have no ability to assign jobs to Service Provider, this right is exclusively reserved for Property Managers or Service Providers."*
- From section 2.1: *"TIDY provides software to manage independent Service Providers. TIDY is not the employer of any of these Service Providers. You acknowledge that we do not supervise, direct, or control a Service Provider's work or any Services performed in any manner. Service Providers provides services to you as a separate business entity, and is not an employee, joint venture, partner, agent, or franchisee of TIDY for any purpose whatsoever."*

The powerful features available to pros and the contractual arrangements between the parties make it clear: Pros retain complete control over jobs, except as limited by their pros.

Insurance, Damage, or Theft Coverage

In addition, if reviewing this guide to understand TIDY's liability in any matter, such as theft or damage of property, it should be clear: TIDY is not involved in any job, and should not be found liable (unless some coverage is had in another agreement).

In fact, the Property Managers Customer Agreement expressly and repeatedly disclaims any such coverage:

- From section 15: *"You can purchase additional protection on jobs for things that TIDY does not cover: like theft, damage, money back guarantee, and other protections. These are not included by default, and subject to a separate agreement and quoting."*
- From section 16: *"It is the sole responsibility of the User to ensure that both You and Service Provider have adequate insurance to protect yourself and the Service Provider, this may include commercial and general liability insurance, workers' compensation insurance (or, if permitted by law, occupational accident insurance), unemployment insurance, liability insurance, and other forms of insurance as necessary to protect yourself and the Service Provider."*
- From section 16.1: *"TIDY does not cover damage of any kind to your property...If damage occurs, ultimately you will need to pursue the party responsible directly."*

Property managers expressly assume liability for the employment status, insurance, damage, theft, and other matters relating to jobs they manage with the TIDY software. Pros are similarly required to have any insurance and license as required by law, and TIDY offers no coverage to them.

Pro's Business Status

TIDY cannot be used by everyone. Pro accounts are restricted to being used only by specific user types.

What kind of pros can use TIDY:

1. **Independent Bonafide Businesses** - If a pro is not added deliberately by a property manager OR they wish to look at bids from new property managers they haven't worked with, they must be an independent bonafide business.
2. **Employees added by a Property Manager** - Property owners can add their own employees and manage them with TIDY. These pros cannot use features intended for business owners until they certify themselves as an independent business.
3. **Contractors added by a Property Manager** - Property owners can add their own contractors and manage them with TIDY. Similarly, they can't use features intended for business owners until they complete the necessary steps.
4. **Never "Gig" workers** - TIDY expressly does not allow or work with "gig workers".

How does TIDY define an "independent bonafide business"?

TIDY defines pros with an independent bonafide business in this way:

- They have an independent business operation (unrelated to the TIDY software) that exists when using the software.
- They take the usual steps a business generally takes to establish and promote that independent business.
- They have any relevant licensing, insurance, or other requirements as their local law requires.
- They market and offer to provide the services of their business to customers, unrelated to their use of the TIDY software.

How does TIDY validate that a pro has a true business?

If a property manager is adding their own contractor or employee, TIDY does not require any kind of validation. Property managers adding service providers to their accounts should take care to follow any applicable legal guidelines.

If a pro is signing up to use the software independently, they must take 3 significant steps to represent and prove that they have an independent business.

1. **Confirm They Are a Business.** They must confirm clearly and repeatedly many times that they are a bonafide independent business. In the pro walkthrough, a pro going through the process to

sign up must see the requirement they are their own business no fewer than 3 times, and many more on average. This requirement is made clear on TIDY's marketing pages, sign-up process, and in the features themselves. In their Service Provider Customer Agreement (or similar agreement), they must agree that they are an independent business.

Highlights from the agreement include:

- a. From section 1a: *"TIDY is the creator of software that allows you to manage your business...only intended to be used by businesses seeking to grow or manage their business."*
- b. From section 1b: *"Service Provider understands, agrees, and intends that Service Provider will provide the Services directly to Clients strictly as an independently-owned and operated business enterprise, and not as an employee, worker, agent, joint venturer, partner or franchisee of TIDY for any purpose. TIDY does not provide the Services described in this Agreement or employ individuals to perform said Services. TIDY is not a "Hiring Entity" for the Services described in this Agreement. TIDY's role is limited to offering the software to manage your business. TIDY also offers software services and tools to other customers, including other businesses who may compete with you and customers using TIDY to manage jobs with businesses like yourself. Service Provider must be formed as a sole proprietor, partnership, limited liability company, limited liability partnership, or corporation. You cannot use TIDY as an individual worker or "gig" worker. You perform all Services under your name, not TIDY's, and your own contract of your choosing."*
- c. From section 1d in bold: ***"TIDY is only intended to be used by Service Providers who are running an existing business and who are marketing their Services beyond their use of the TIDY software. If this does not describe you, do not use the software."***
- d. From Section 13a: *"Service Provider is an independently established business entity and has not been engaged by TIDY to perform services on TIDY's behalf. Rather, Service Provider has entered into this Agreement for the purpose of using the TIDY Software to manage their business. In other words, Service Provider is a customer of TIDY."*

Their agreement is clear both contractually and by their actions in the app itself.

2. **Specific Representations and Warranties.** They must expressly agree to a series of representations and warranties in the Service Provider Customer Agreement (or similar agreement). These representations are clear, and include these key representations in section 14:
 - a. *"Service Provider represents and warrants that they are a bona fide, independently established business entity formed as a sole proprietorship, partnership, limited liability company, limited liability partnership, or corporation; and"*
 - b. *"Service Provider represents that they customarily provide services of the same nature as the ones publicly listed via the TIDY Software; and"*
 - c. *"Service Provider is actively marketing their Services outside of their use of the TIDY Software."*
3. **Proof of marketing and business.** As shown in the TIDY for Pros walkthrough, they must provide proof of marketing (advertisements or third-party websites) or independent customers

(e.g. reviews from third parties). They may also provide pictures of their professional equipment. They must always provide at least 1 proof of external marketing and 1 other proof of business (either marketing or equipment), for a minimum of 2 proofs.

4. **Third Party Proof.** In addition, for pros that choose to use connected payment processing services, they must do so through Stripe, a Payment Service Provider. During this process, they must provide their business information including KYC. This includes at a minimum, business type and industry. But it can also include information such as business website and other information as seen fit by Stripe to confirm the business. See more:

<https://stripe.com/legal/connect-account>

<https://support.stripe.com/questions/verifying-your-business-address>

TIDY's goal here is not to exclude genuine business owners (including new businesses) but rather to make it impossible to sign up and use TIDY without committing fraud. It can be very difficult to catch all kinds of fraud, so if property managers wish to implement additional checks, we do support a range of custom certifications they can take to further ensure pros are genuine business owners. TIDY is unable to represent and warrant that pros are genuine businesses, only that we took the described steps.

Why does TIDY not work with gig workers?

TIDY is simply not in the business of working with gig workers, by which we mean people without an "independent bonafide business". The reasons are the following:

1. No apparent demand. We have not received requests from property managers for this. For many categories of jobs people use TIDY for, there is no legal ability to offer these services as a gig worker, for example, plumbing, tree trimming, and electrical work.
2. We currently tell property managers that we don't work with gig workers (with the caveats listed above). This builds confidence by all parties. Pros who make false representations severely negatively hurt TIDY reputationally and contractually.

The only exception is that if a property manager adds a contractor or employee to use on their property, we don't prevent this in any way. But these users are restricted to working only with that property manager.

Typical Agreements Between Pros and TIDY

Unless your pro has a separate signed agreement between themselves and TIDY, they are likely bound to the agreement then listed on the website at the time (Service Provider Customer Agreement).

Our agreements are bound by the following principles:

1. They are clear, transparent, and require no log in to view. They are always visible at tidy.com/terms.

2. Pros have multiple ways to opt out. They can offer a custom agreement, or even opt out of arbitration.
3. Repeated confirmations of signature, to make sure we go far and beyond what is typically done to ensure someone agrees to the terms. We require of them:
 - a. Affirmatively marking a checkbox that they agree to the terms when signing up.
 - b. Later, before finishing the setup, they must go through another time confirming they agree to the terms (including individual arbitration). At this time they must view the page with the terms.
 - c. When users take certain actions, such as adding employees or customers, they confirm their agreement to the terms.

When a customer agrees to the terms, we employ a rigorous and secure process to record and maintain this critical information:

- Database Technology: We utilize a high-performance, enterprise-grade PostgreSQL database, known for its reliability, data integrity, and ACID (Atomicity, Consistency, Isolation, Durability) compliance.
- Data Structure: Agreement data is stored in a dedicated "Agreements" table, designed with a normalized schema to ensure data consistency and minimize redundancy.
- Timestamp Precision: Each agreement event is recorded with microsecond precision timestamps, using the database's built-in timestamp with time zone data type, ensuring accurate chronological ordering and time zone awareness.
- Unique Identifiers: Every agreement record is assigned a unique UUID (Universally Unique Identifier), ensuring each record can be distinctly identified and traced.
- Data Encryption: All sensitive data is encrypted at rest using AES-256 encryption, and in transit using TLS 1.3 protocols.
- Access Controls: Database access is strictly controlled through role-based access control (RBAC) and multi-factor authentication (MFA) for administrative users.

This state-of-the-art process aligns with and often exceeds industry best practices. It is comparable to methodologies employed by:

- SignNow, the 4th largest eSignature service globally (founded by TIDY's founders)
- Fortune 500 financial institutions
- The Los Angeles Superior Court System (lacourt.org)
- The California Department of Health Care Services (coveredca.com)
- Leading cloud service providers like Amazon Web Services and Google Cloud Platform

Our implementation of these enterprise-grade security measures ensures the highest level of data integrity, confidentiality, and non-repudiation for all agreement records.

Dispute Resolution

For disputes between property managers and pros, each party can dispute with the other party in the app, communicating back and forth towards a resolution. This is similar to other credit card dispute processes. If you cannot find a resolution, you may need to seek other dispute resolution methods. We do not limit your ability to take action to resolve disputes.

In the event of any dispute with TIDY, unless you have a custom contract that says differently, you have agreed to individual arbitration with Fairclaims. Both property managers and service pros have similar clauses in their agreements that govern the nature of dispute resolution.

The process outlined with Fairclaims is fair to all parties and highly advantageous to service providers or property managers. Fairclaims allows you to file legal grievances against TIDY at very low cost, without the need for expensive attorneys. While we hope never to have such a disagreement, this forum should allow you to file a legal claim more easily and have it heard. It assists in any case in which TIDY might also file a claim against you. For example, should a service provider commit fraud and not have a bonafide business, submitting false documents, TIDY is legally and contractually entitled to damages. Should TIDY file the claim in its corporate home of Delaware, you might need to incur significant legal costs for hiring representation there as well as travel. With Fairclaims, it is online and the dispute resolution process itself is low cost.

In order to bind all the parties (including TIDY) to this method of dispute resolution, parties have agreed *“If either party initiates an action in violation of this mutual arbitration provision, and a court or arbitrator determines that such an action is barred by this agreement, then the party who initiated the violating action shall be liable to pay the other party’s costs (including attorney fees) to remedy that violating action, unless such damages are prohibited by law.”* You should expect TIDY to enforce this.

If a property manager or service provider wishes to have a separate dispute resolution method and custom contract, this must be arranged in advance of any issue in a separate contract. We always consider other agreements and are happy to work with you. However, we do think it's always in the benefit of both parties to lower the cost of dispute resolution.

Summary

We hope this guide is helpful to any party trying to assess various legal matters, including liability of parties or employment-related concerns.

For example, property managers or pros may have the following questions, which are clearly answered in this guide:

- Should a job issue occur, such as damage or theft, is TIDY liable? **No.**
- Are property managers responsible for employment laws for pros? **Yes.**
- Is TIDY ever an employer? **No.**
- Can pros use TIDY if they are not a business? **No** (unless added directly by a property manager).

- Does TIDY control transactions? **No.**
- Is TIDY in the business of property management, plumbing, electrical, cleaning, HVAC, inspections, tree removal, lawn care, handyman, pool cleaning, appliance repair, junk removal, trash removal, or other property-related services? **No.**
- How should disputes be resolved with TIDY? **Individual arbitration in Fairclaims as agreed.**

Both property managers and pros should operate under these assumptions, and if they do not work for their businesses they should contact TIDY prior to using our software tools.

TIDY's software tools are used by many different types of customers, on plans ranging from the free plan to recurring subscription plans. TIDY has the most advanced facility management software for single family properties and has one of the easiest-to-use field management software platforms for home service businesses to use. TIDY takes many steps to ensure each customer retains complete control over their experience and takes no part in the services themselves. Both property managers and pros contractually and in practice work directly together using the software.