The Institute of Certified Bookkeepers

18th June 2024

Institute of Certified Bookkeepers Software Review

Helen Buck
Accounting On Us

Fergus

About Me

I have been a self-employed bookkeeper for nearly 20 years. I am a Fellow of the ICB and have a varied client base from someone with a side hustle to a £3.5m turnover Company and it includes several 'trades'.

With the variety of clients I have I was asked if I would have a look at Fergus to see if it was something I would be happy to recommend to not only my clients but also the ICB.

Company Background

Fergus www.fergus.com is the brainchild of Dan Pollard, a veteran Tradie. He dreamed it up a few years ago, while he was knee deep in the trenches of running his own trades business. After going bust once and burning out once, Dan figured out that a trades business needs proper systems in place to keep it running – without running its owner into the ground.

In his search for great systems he developed Fergus, and it was so good he was able to grow his business from 4 employees to 24 in less than 4 years. In fact, he even worked himself out of a job.

They have made it their mission to build truly successful trade and service businesses that can stand up on their own, without the owner's operational involvement. How are they achieving this? By giving businesses the right tools at the right time to get the job done without wasting any time.

Fergus is the operational backbone of trades businesses, taking care of the day-to-day and providing complete clarity and control. They are giving business owners and managers the time and insight they need for the business to grow and succeed.

This software is aimed at the following but any trade/business that uses labour and materials would benefit from this software.

- Electricians
- Plumbers
- Builders
- HVAC
- Roofers
- Field Services

The Product

Fergus is designed to be a simple way of keeping all the balls in the air for a busy trades person who generally dislike the 'paperwork' side of their business.

From the initial contact with Fergus I soon realised that everyone was passionate about this software and they could not do enough to answer any questions and point me in the right direction. It has the feel of a family/small company in the way that they treat their customer and the product is far superior and very well thought out and you can tell that someone has designed it to tackle their own issues whilst a tradesperson and always keeps the customer at the front of their mind

I was set up with an account by Fergus and had a online demonstration of the software which I understand is offered to all new customers and was really useful. I remember using the word 'wow' quite alot.

©ICB 2024

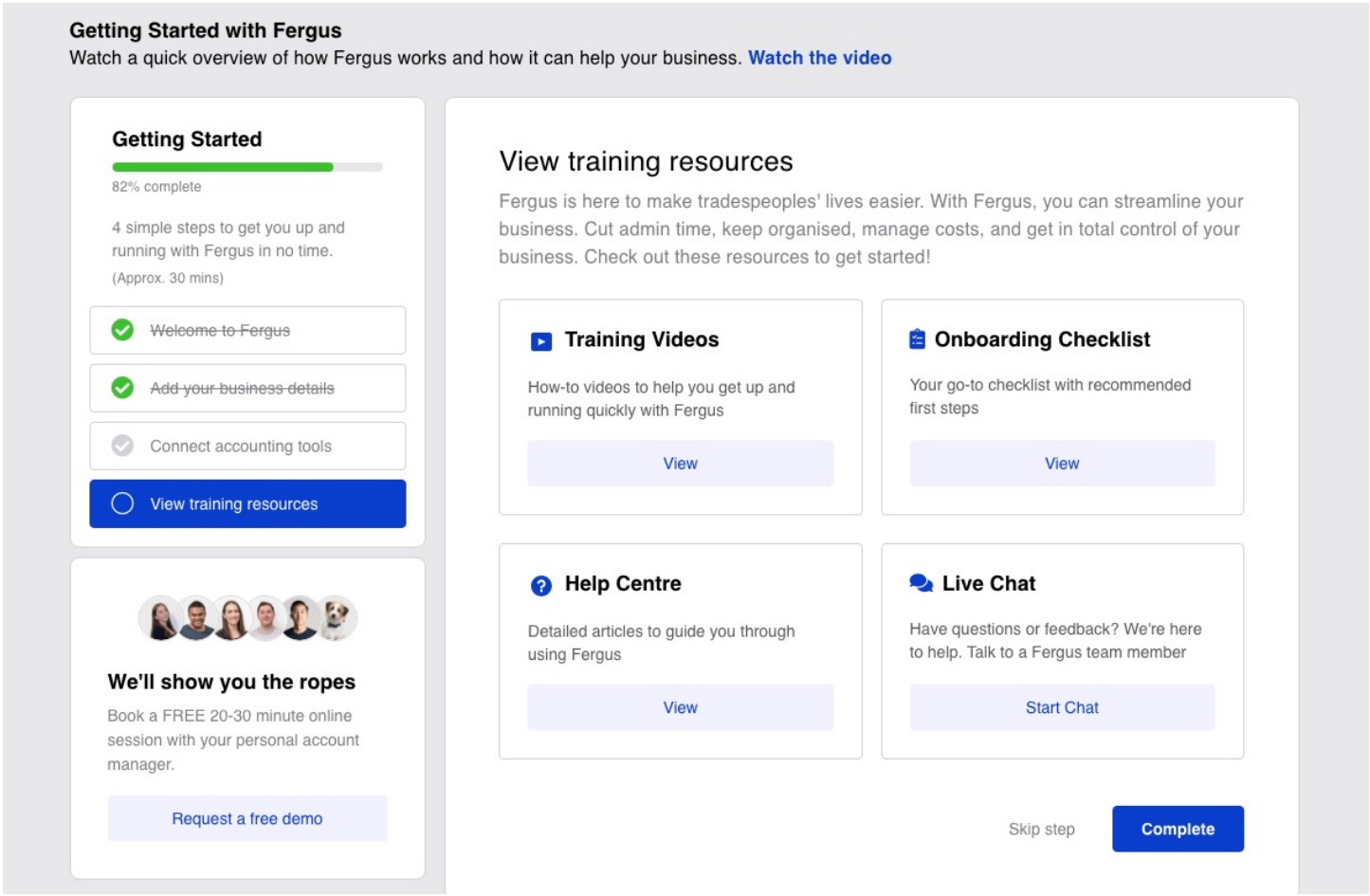
From the log in page I liked the look of the software, it was clear to see the status of any job and what needed to be completed. That way the tradesperson can deal with what is the most urgent and instantly see what is happening in the business.

Fergus works on a very simple traffic light system and visually its very clean and easy to understand even if viewing on a phone.

The first thing you need to do is set up your profile, this is just completing your information, logo, bank details etc as this will be used in your quotes and invoicing.

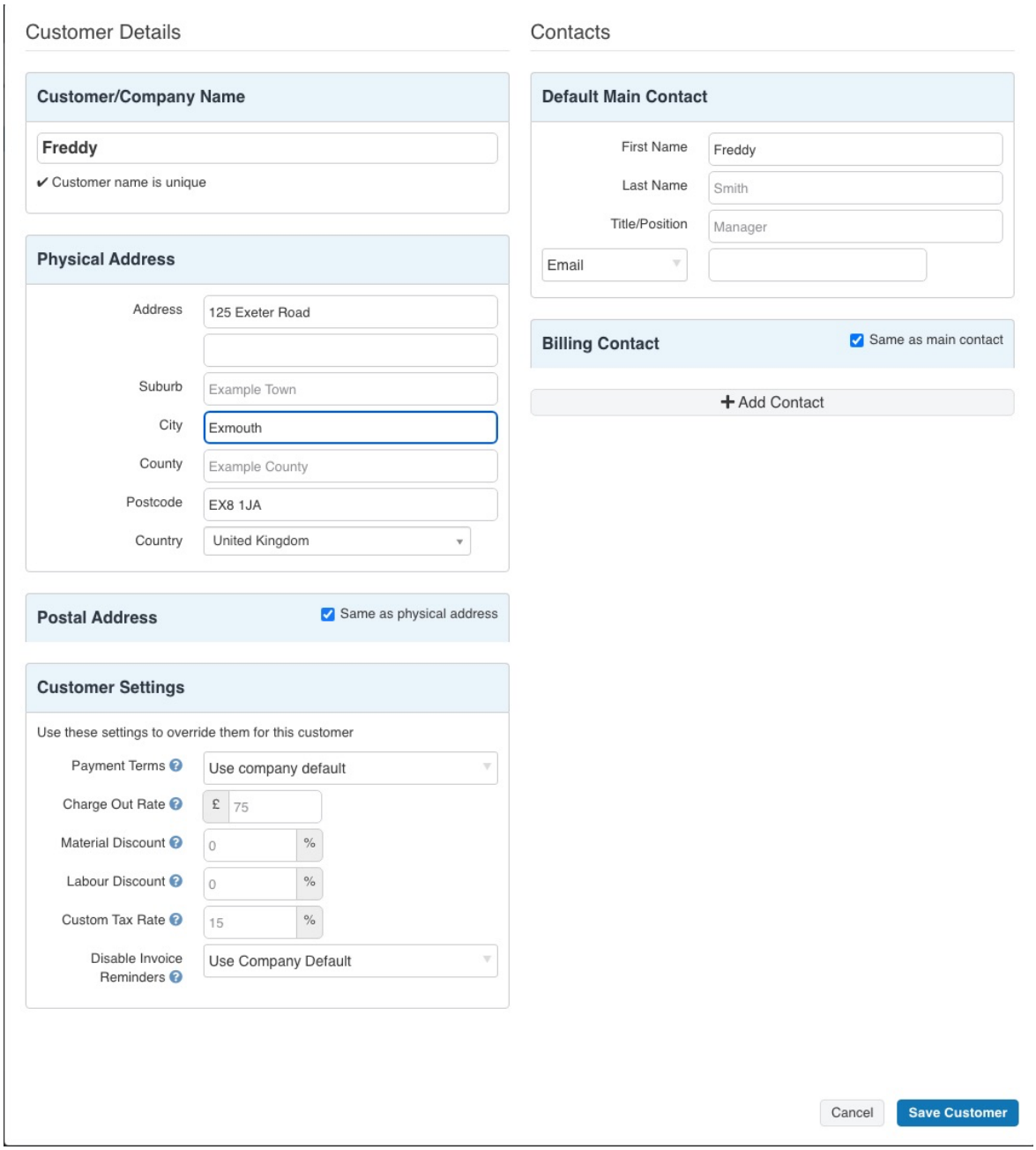
There are also some very clear and easy to understand training videos, onboarding checklists, there is also a help centre and live chat.

Once that is done it starts getting interesting.



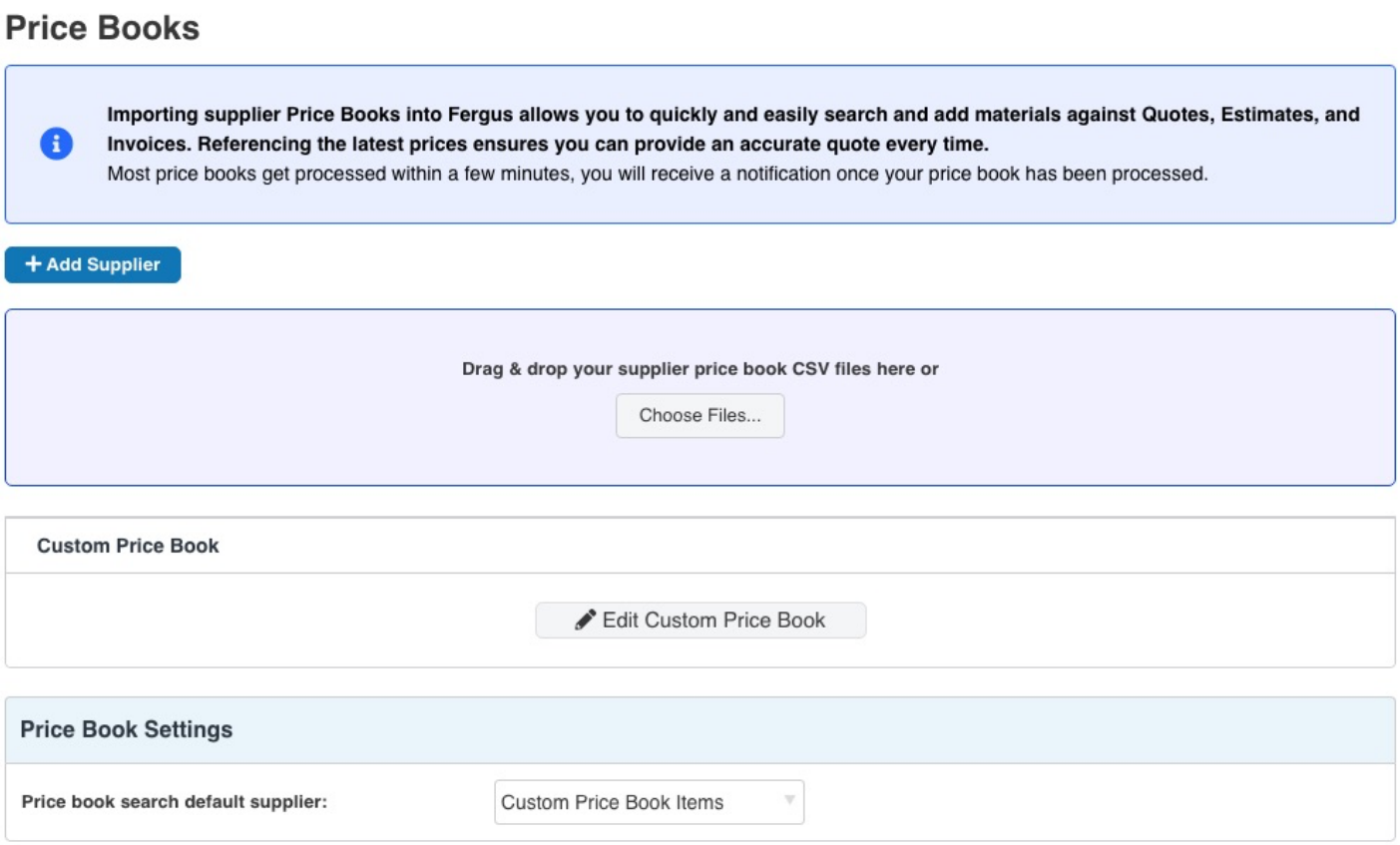
©ICB 2024

Setting up your customer is quick and simple, along with the normal name and address you can set charge out rates on this screen so the software can be adapted to suit individual customers.



Once you have set up your customer you are ready to send a Quote or Estimate, the customer record will eventually hold all of your documents and additional information, think of it as the customers filing cabinet.

You can Import supplier Price Books into Fergus which allows you to quickly and easily search and add materials against Quotes, Estimates, and Invoices. Referencing the latest prices ensures you can provide an accurate quote every time. Most price books get processed within a few minutes, you will receive a notification once your price book has been processed



Quotes or Estimates are easy to complete and you can have as much or as little information included as you like. When working on the quote/estimate you can set charge out rates and mark ups.

ICB Reviewer - Partner Test Account
[redacted]

Pens and Pencils Stationers
[redacted]
Exmouth
Devon, [redacted]

Site Address
[redacted]
Exmouth
[redacted]

Job Number: FERG-1
VAT Number: n/a
Quote Date: 29th May 2024
Valid Until: 28th Jul 2024

Quote | Move 5 Downlights & Dimmer Switch

Thank you for the opportunity to price the work on your property.

Our mission is to make every customer a repeat customer. Customer service is everything to us and we have the systems in place so that we deliver on our promises.

We have provided you with our best value price based on the information we have, we are always open to a conversation on our quoted amount, please call or email the office if you have any queries about this price.

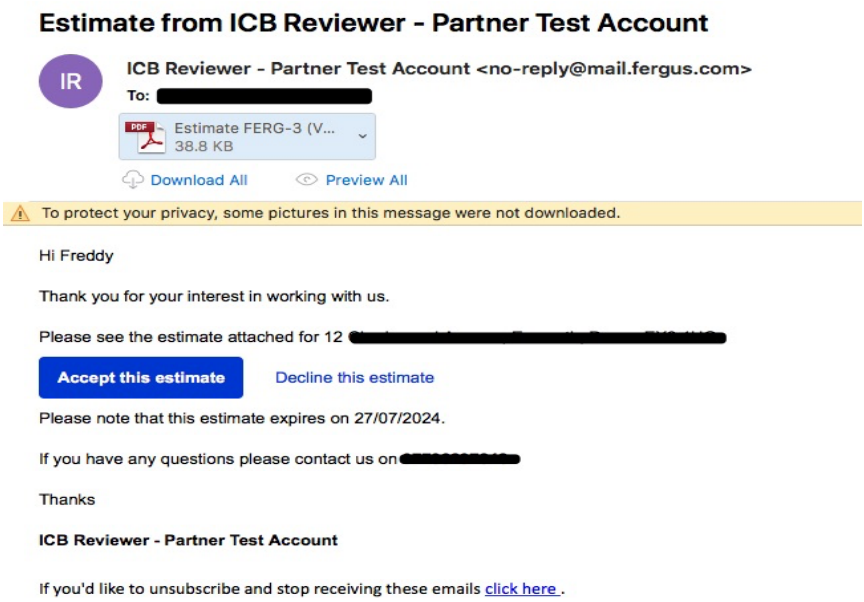
Name	Quantity	Price	Total
Labour - ½ day			
Labour to move and supply 5 downlights and add a dimmer switch			
Downlights Downlights	5.00	£75.00	£375.00
Cable Wiring Cable x 1m	9.00	£4.00	£36.00
Day Rate Day Rate	0.75	£250.00	£187.50
Dimmer Switch	1.00	£60.00	£60.00
			£658.50

Subtotal	£658.50
VAT Amount	£131.70
Total	**£790.20**

Materials supplied by us have a manufacturer guarantee of not less than one year.

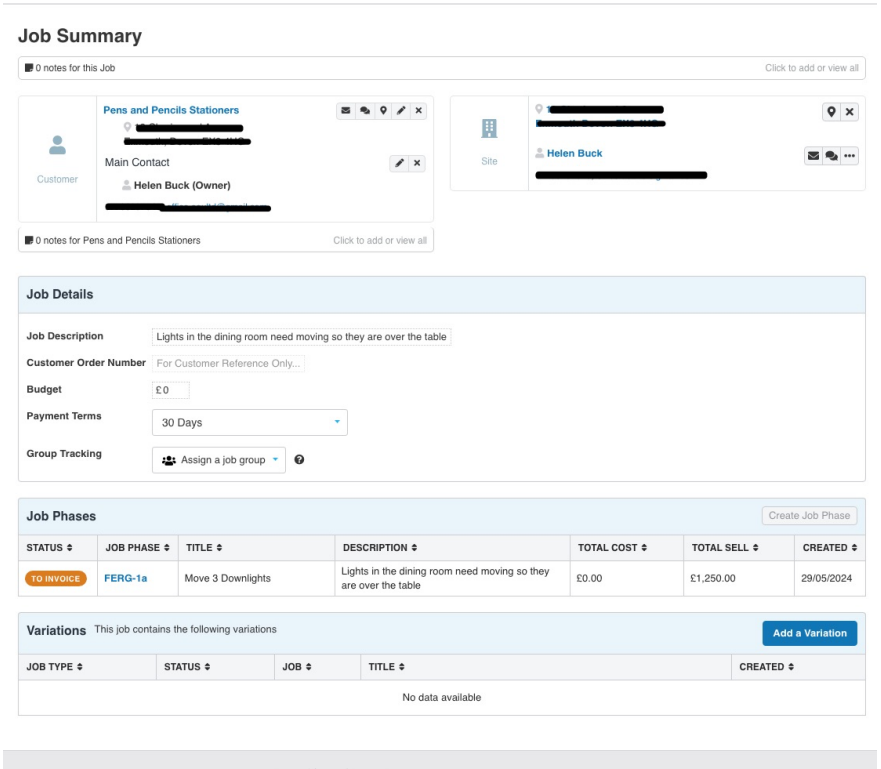
We look forward to working with you on your project. Please let us know if you have questions or comments.

Once you have finished the quote you can email it directly to your customer for their approval or comment.

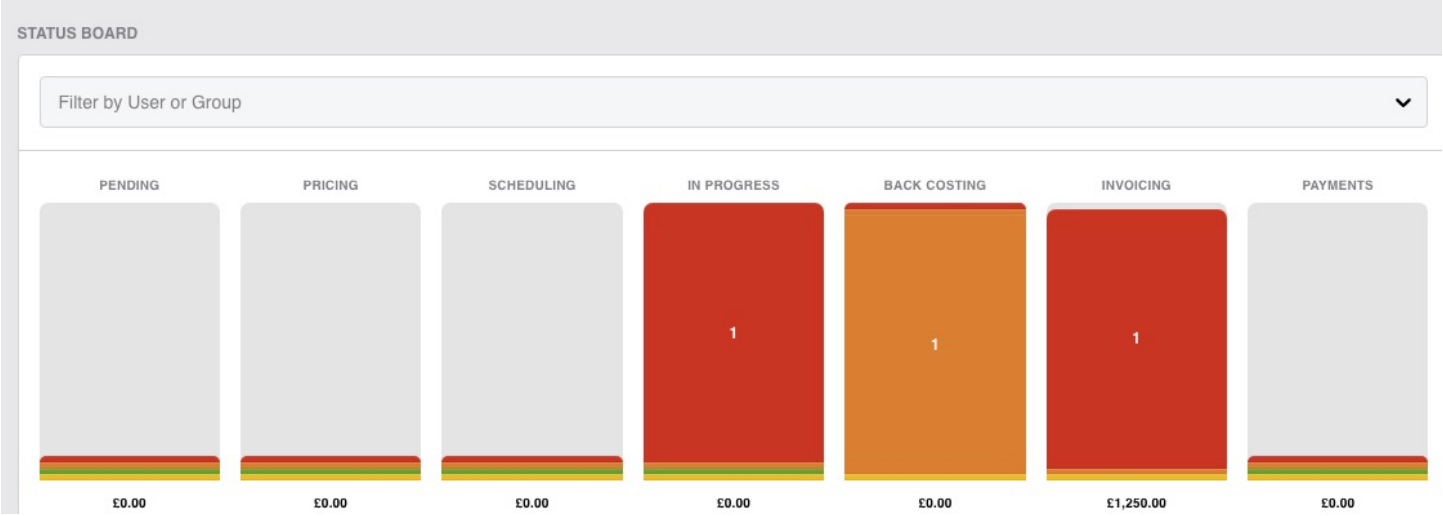


From within the email they can either accept or decline your quote, once they have responded you will get a notification and the job will move to the next stage for you to work on, you are also able to add in variations.

This will then create your job summary

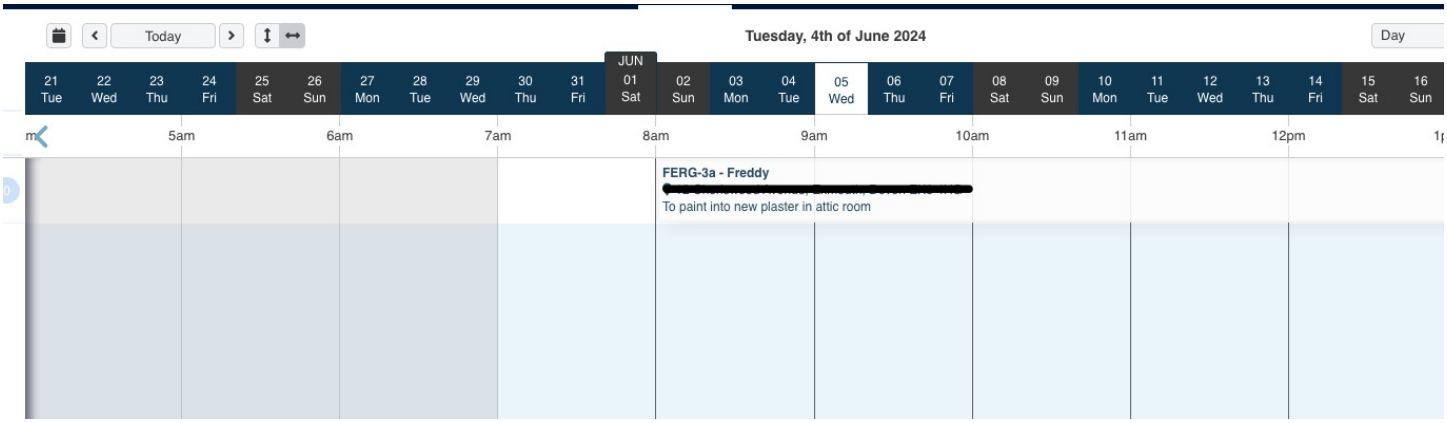


You can keep an eye on the progress of jobs at anytime from the home page and the status board



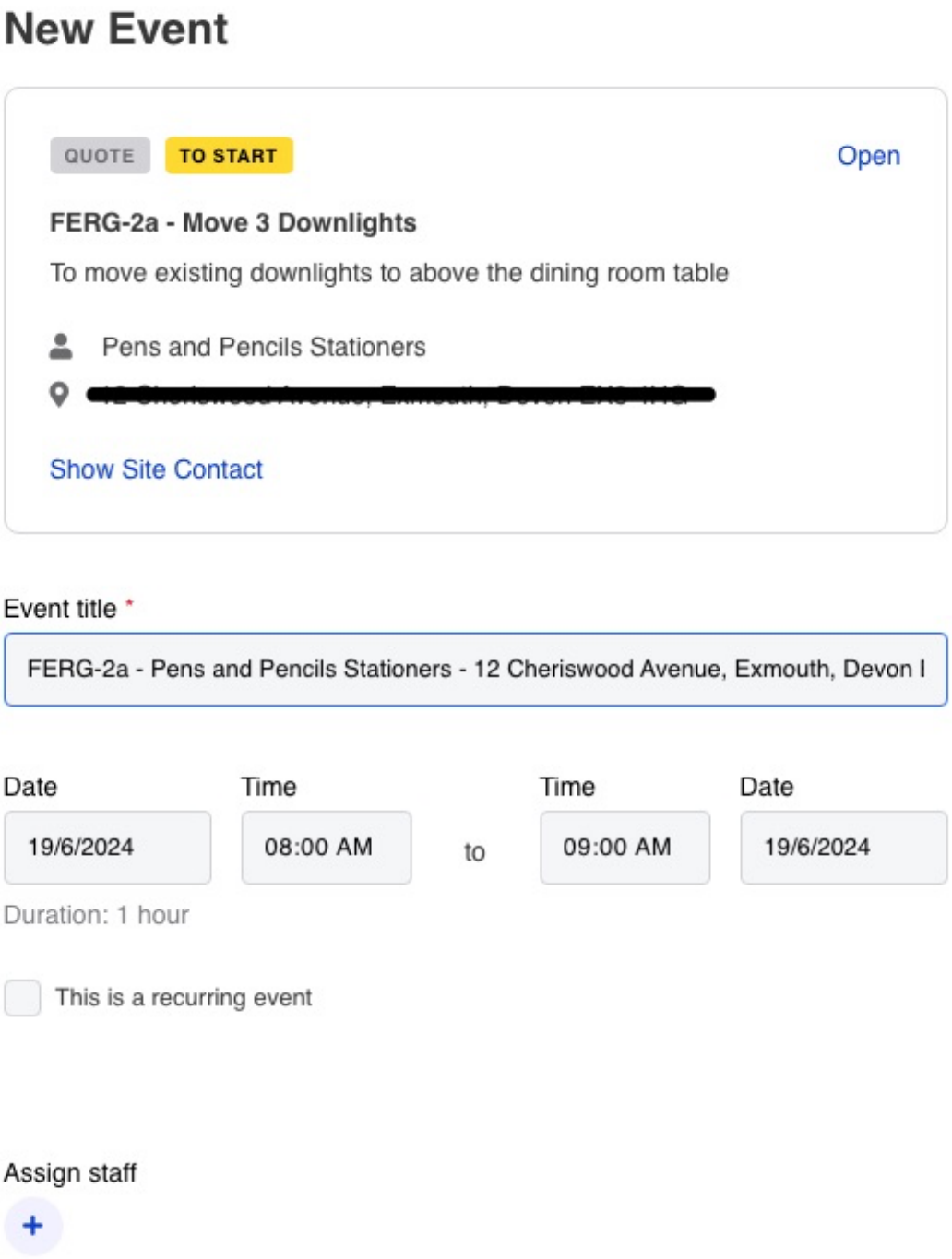
Each section works on the traffic light system, once the quote/estimate as been accepted its moved to the scheduling section and will be red until it is 'booked in'

The calendar is simple to use and its easy to book in work and move them around if necessary should things change or overrun



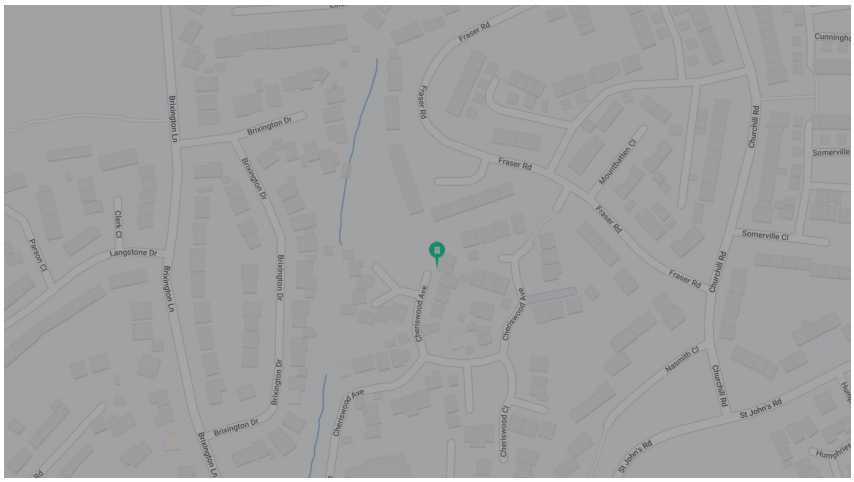
©ICB 2024

From the ‘booking in’ screen you can allocate staff, show site information



©ICB 2024

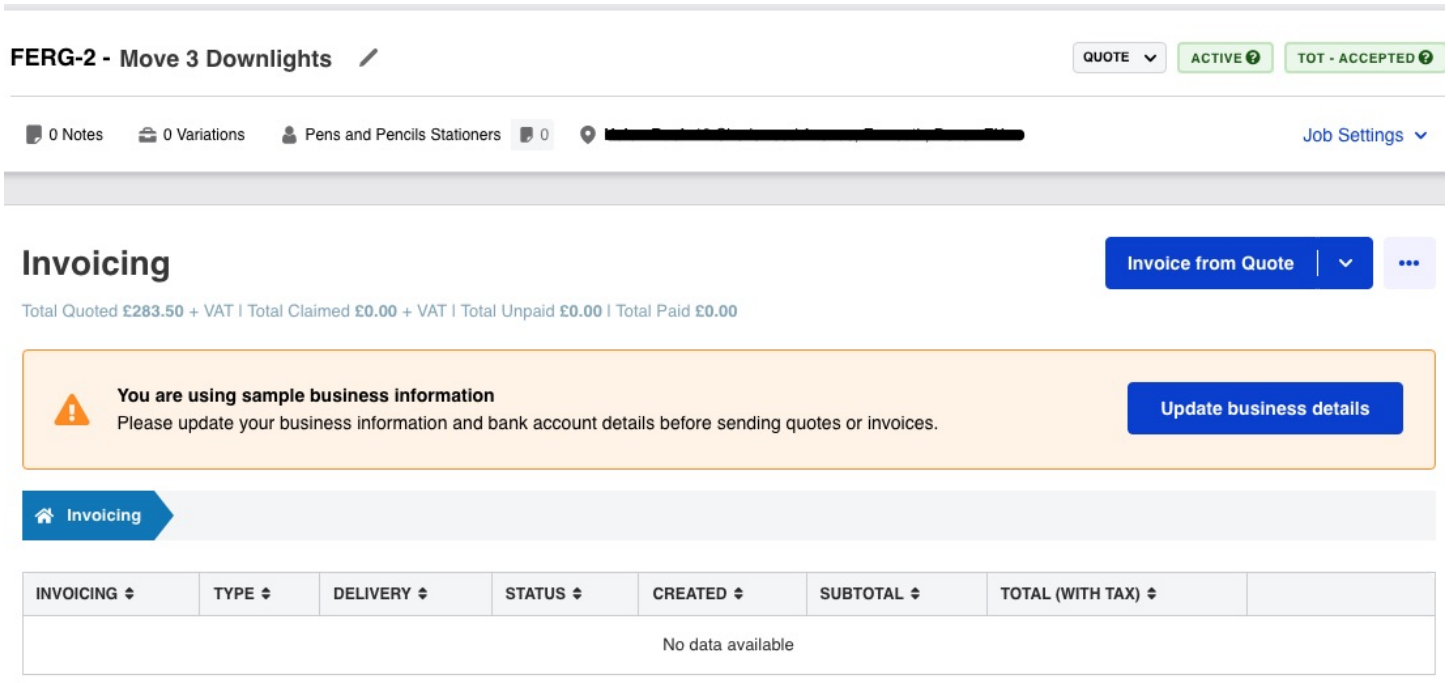
Once the work is booked in the trade will receive comprehensive instructions including a map link which shows them precisely where the job is so no driving around trying to find the addresses. It also allows you to keep track of your workforce in real time



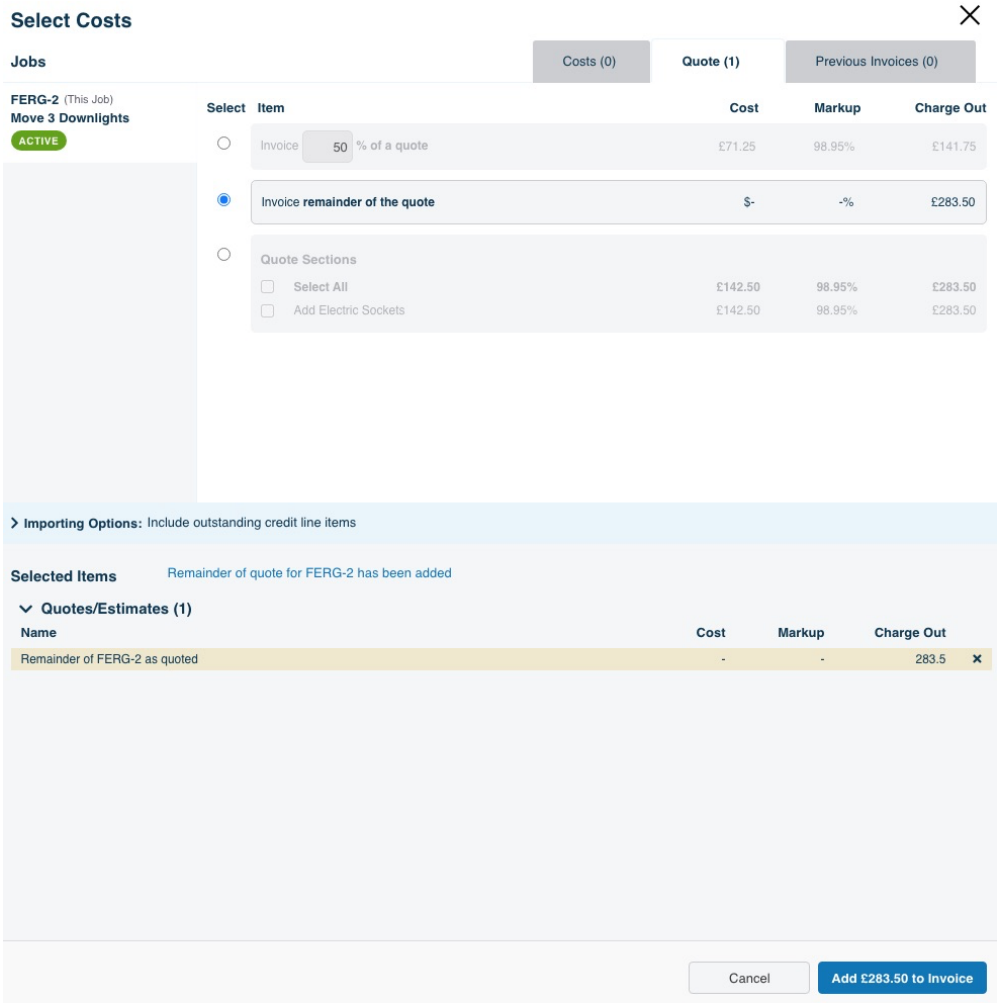
Once the job has been completed, the customer can electronically sign off the work and the trades person can upload photos as evidence of work completed.

This is particularly useful if you use subcontractors and also to have on record should the customer come back to you at a later date with queries

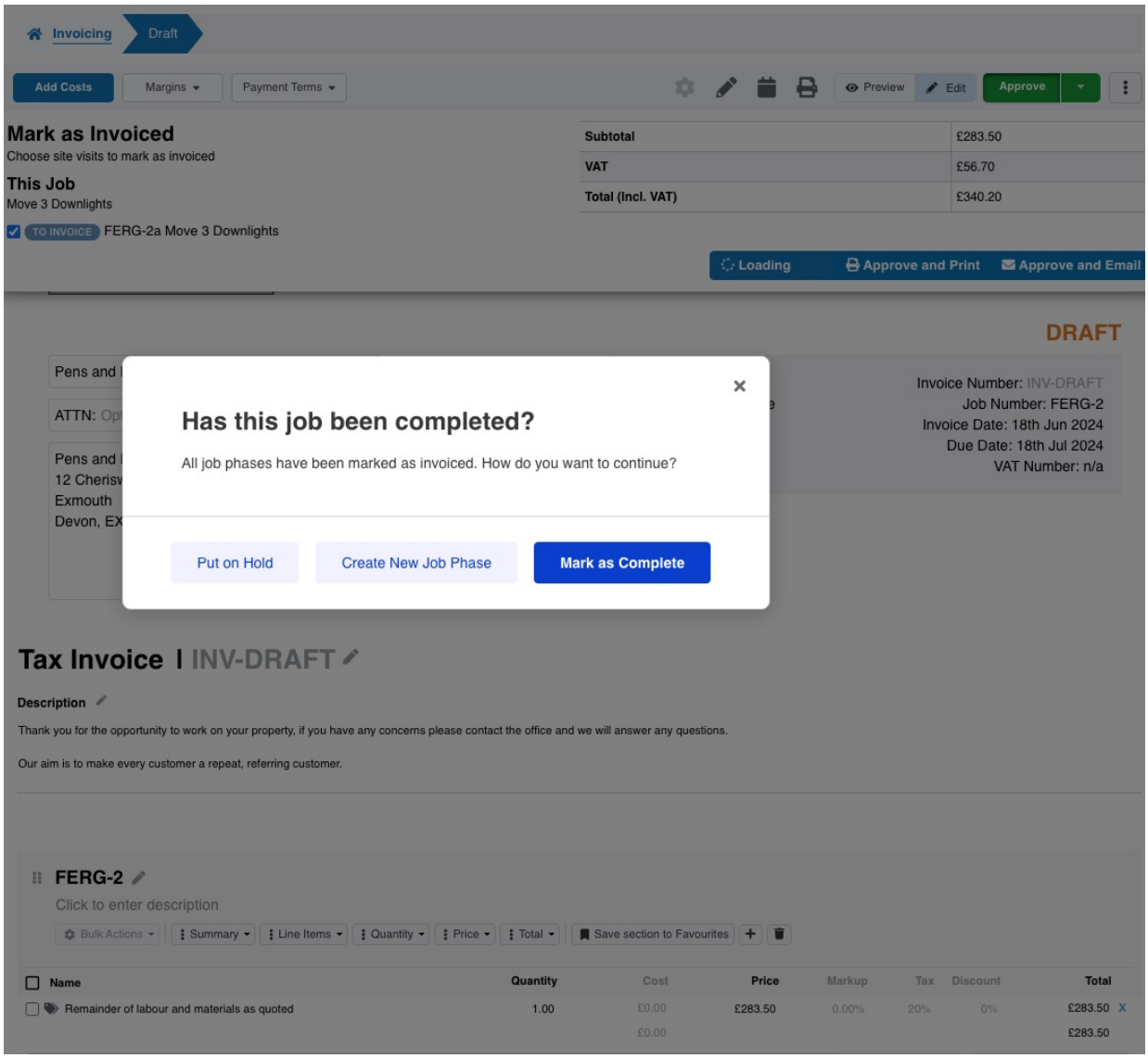
Once the work is completed you update the records to ‘ready to invoice’. You can at this stage check all your pricing and budget etc. You can invoice from quote so there is no duplicate inputting of data.



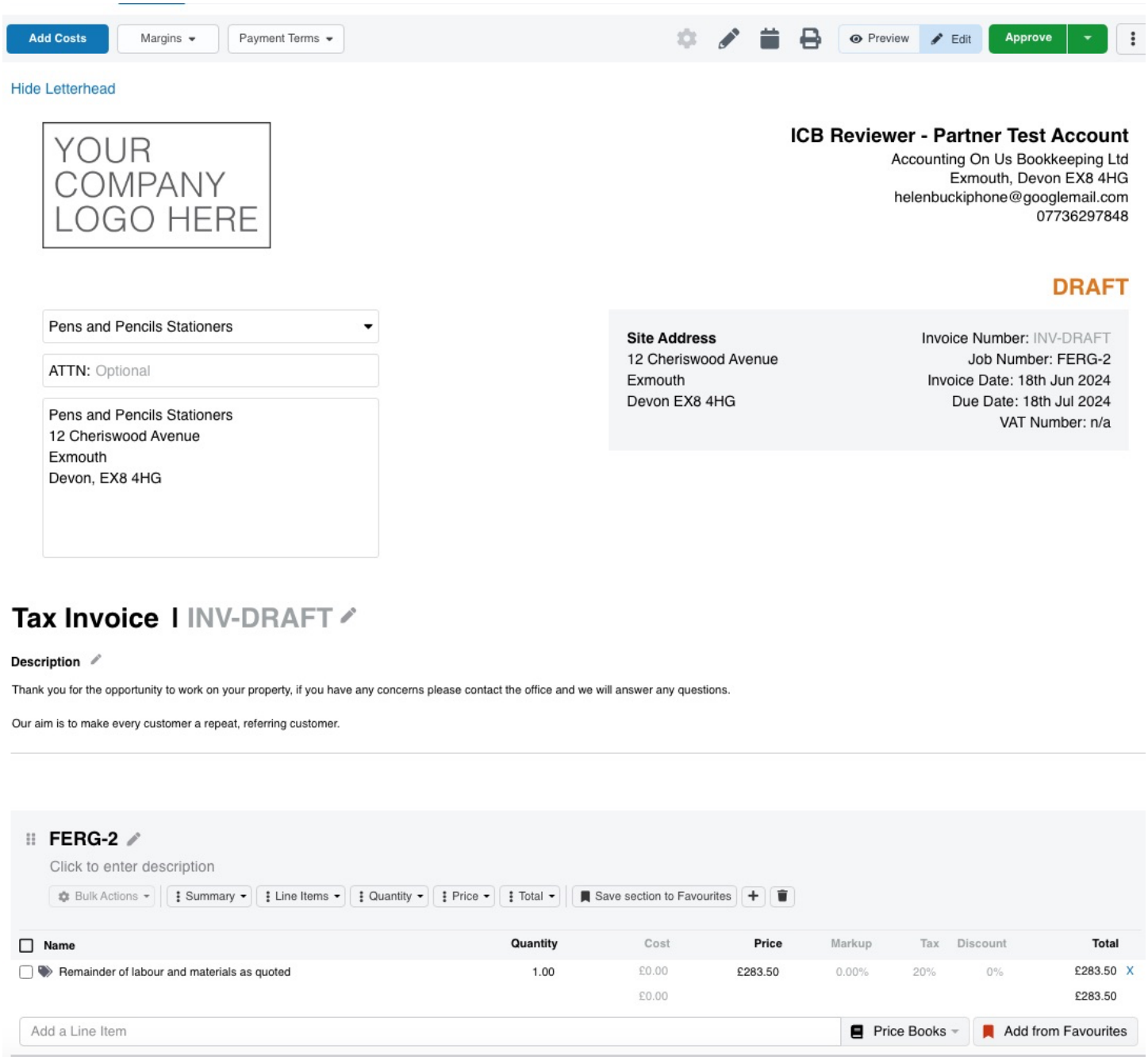
When invoicing from the quote you have the option to invoice a percentage or in full and also to just invoice a selected section



Once you click 'add to invoice' your invoice is created in draft format and will not be sent until approved. As you approve it you can either print or email directly to the customer and then mark the status of the job ie complete

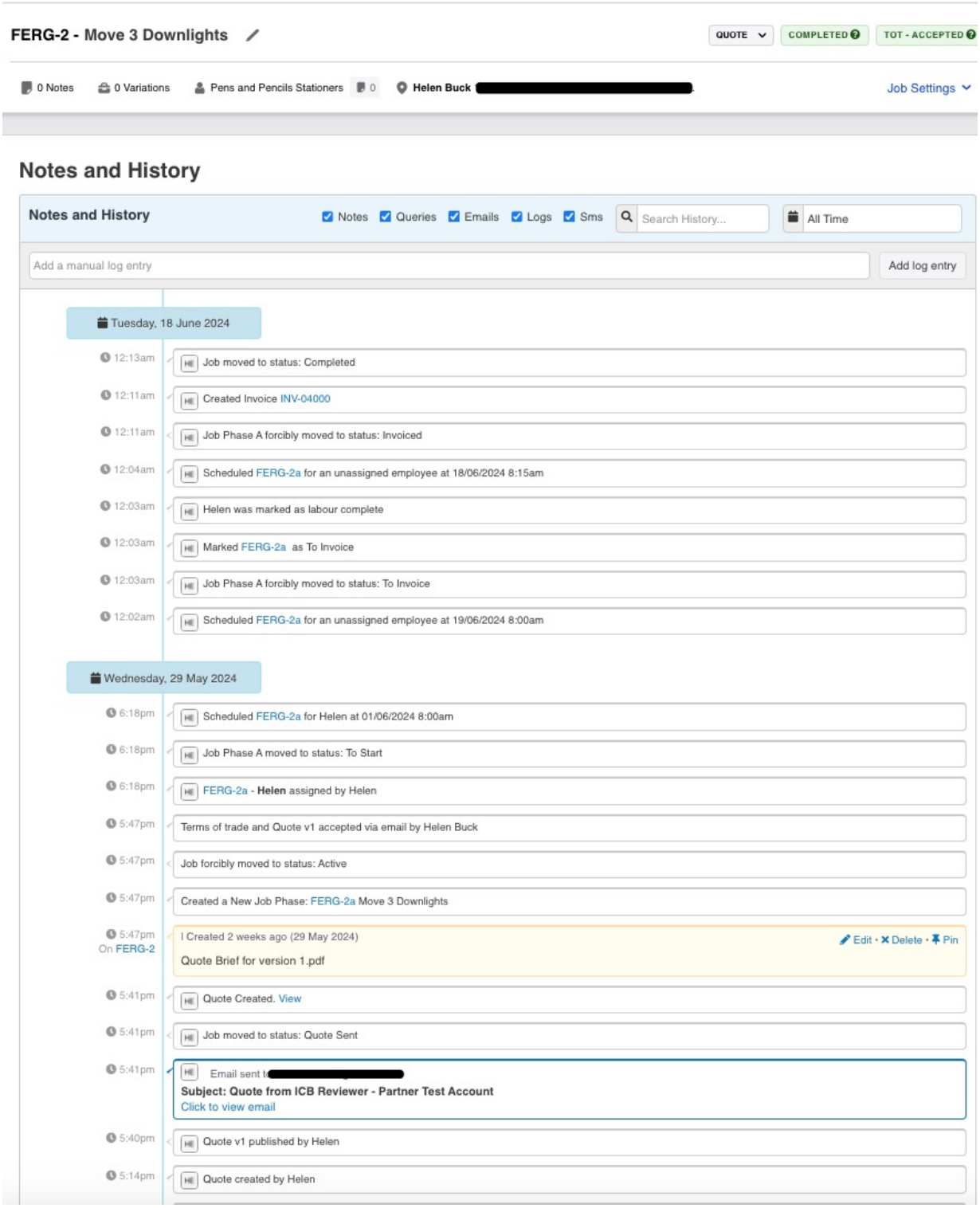

Invoicing
Draft
Add Costs
Margins
Payment Terms
Preview
Edit
Approve
Mark as Invoiced
Choose site visits to mark as invoiced
This Job
Move 3 Downlights
TO INVOICE
FERG-2a Move 3 Downlights
Subtotal
£283.50
VAT
£56.70
Total (Incl. VAT)
£340.20
Loading
Approve and Print
Approve and Email
DRAFT
Has this job been completed?
All job phases have been marked as invoiced. How do you want to continue?
Put on Hold
Create New Job Phase
Mark as Complete
Invoice Number: INV-DRAFT
Job Number: FERG-2
Invoice Date: 18th Jun 2024
Due Date: 18th Jul 2024
VAT Number: n/a
Tax Invoice | INV-DRAFT
Description
Thank you for the opportunity to work on your property, if you have any concerns please contact the office and we will answer any questions.
Our aim is to make every customer a repeat, referring customer.
FERG-2
Click to enter description
Bulk Actions
Summary
Line Items
Quantity
Price
Total
Save section to Favourites
Name
Quantity
Cost
Price
Markup
Tax
Discount
Total
Remainder of labour and materials as quoted
1.00
£0.00
£283.50
0.00%
20%
0%
£283.50
£0.00
£283.50

©ICB 2024



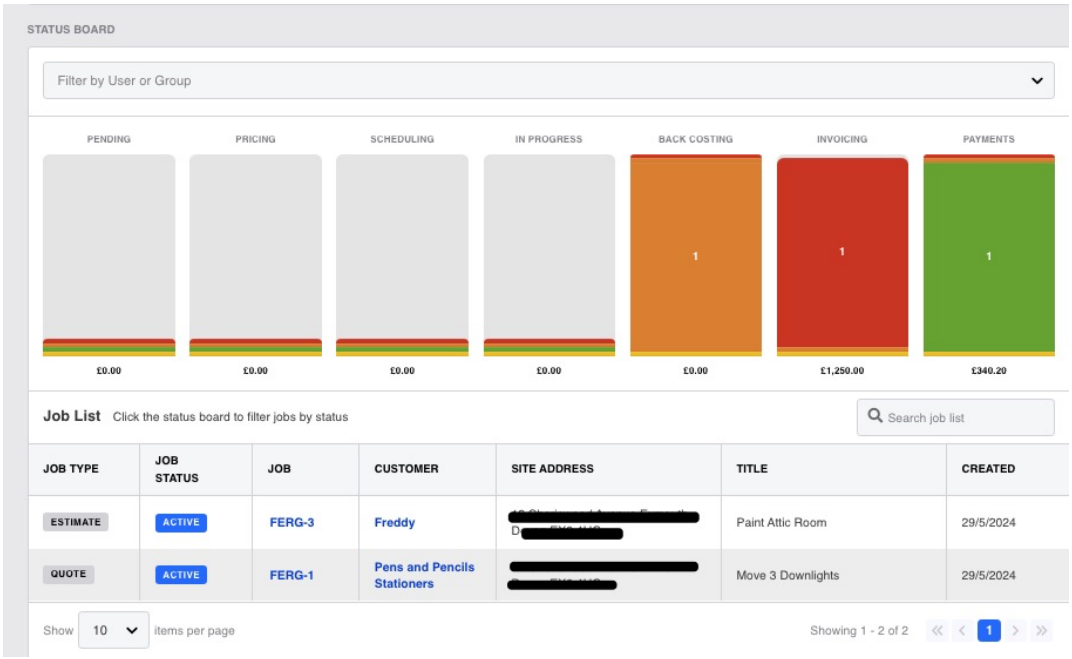
The customer can then make payment via invoice link which is quick and great for cashflow

There is a comprehensive paper trail on the custom record showing all activity. You can drill down into the blue areas which is an easy way to investigate any issues.

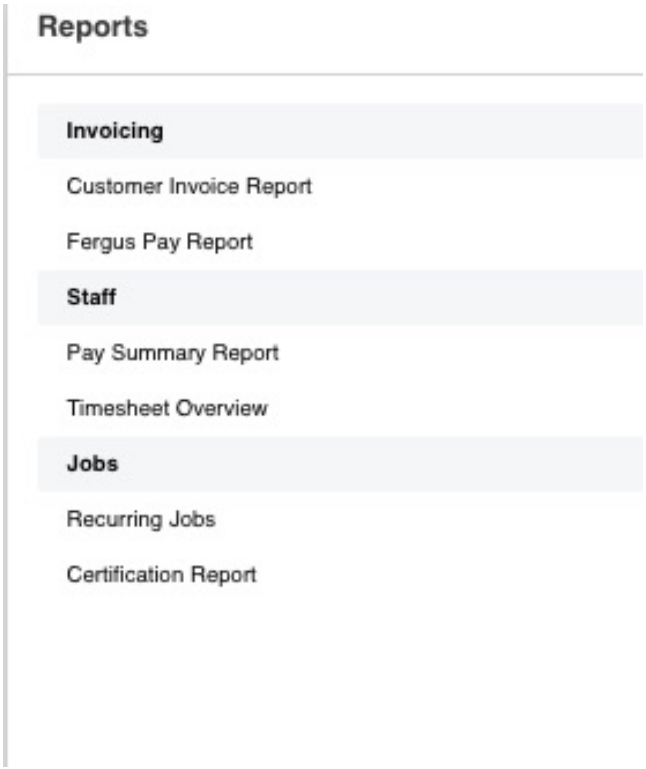


©ICB 2024

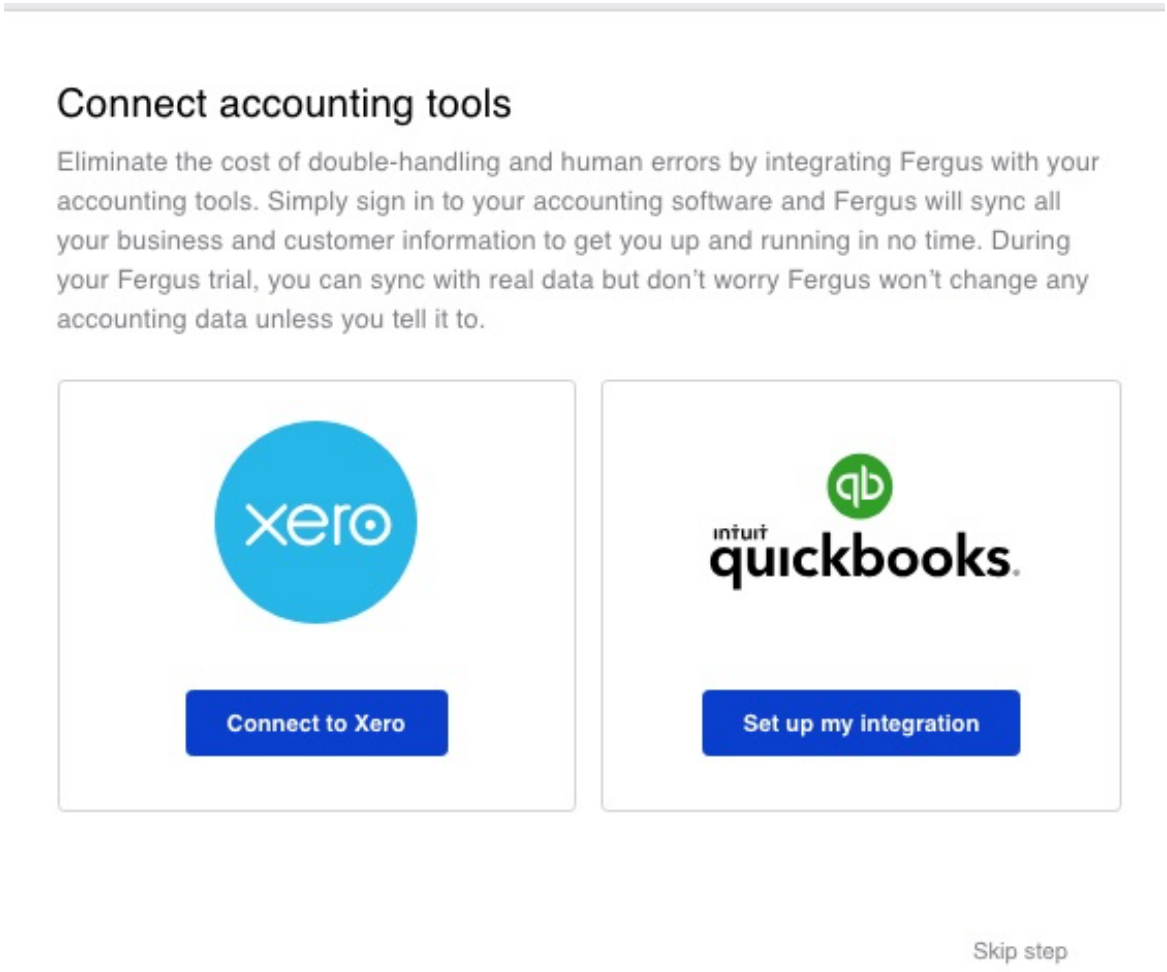
You can now see that this customer job has moved to the final section on the status board.



In addition to all the above you can run various reports to be able to follow the finances of the business



Another great addition is the integration to accounting software which really is a must nowadays.



Key Benefits

This software should allow our clients to be much more on top of their paperwork. It follows a process and each section needs to be completed. This should, in turn, provide us with much better data to work with and save us having to chase for paperwork.

The whole onboarding process was so easy, the one to one demonstration was pitched just right, it will give our clients the confidence to use the software. Once they see how this software can change the way they work and cut down on their 'admin' days they will wonder how they managed before.

Also the training videos are just right in length and get straight to the point and the customer service is great

Strengths

All customer records in one place

Pricing a job is easy without having to trawl through pricelists

Terms of Business completed electronically

Map link to show trades where the property is – saving time and stress

Certification can be sent directly from the software

Customer job sign off

Being able to track your workforce

Supplier invoices can be stored within the software

Integration with Accounting Software

Mobile app to allow you to input up to date information

A complete record for every customer/job

Photos as evidence of work completed and to what standard

Comprehensive amount of information held on each customer/job including supplier invoices

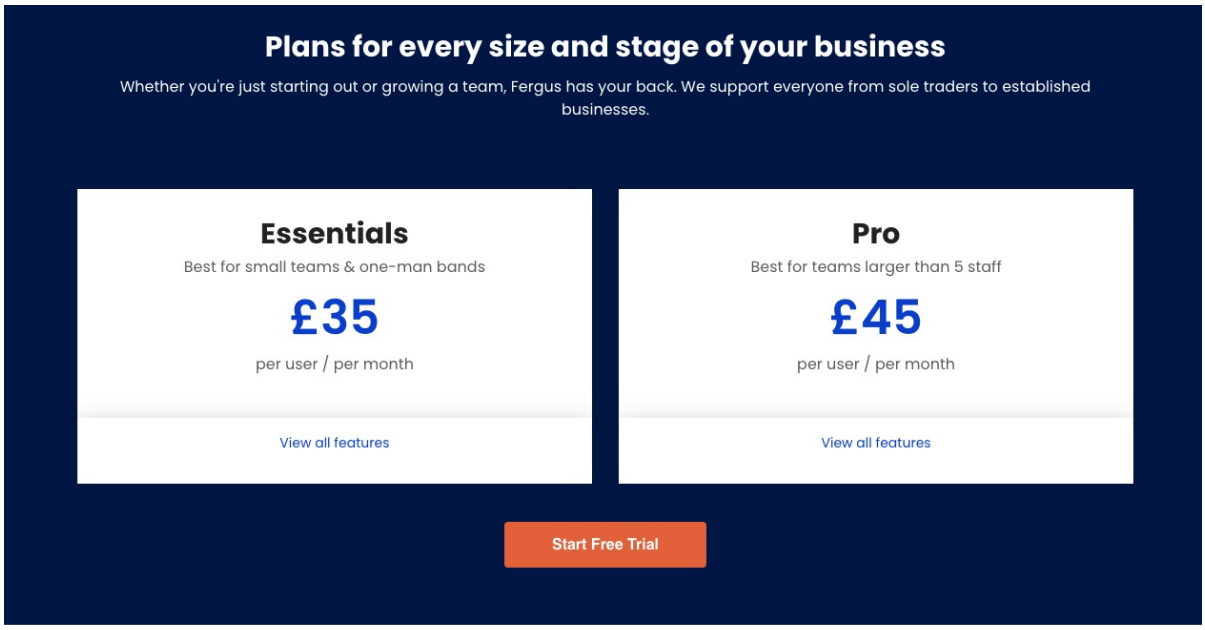
Customer support is exceptional

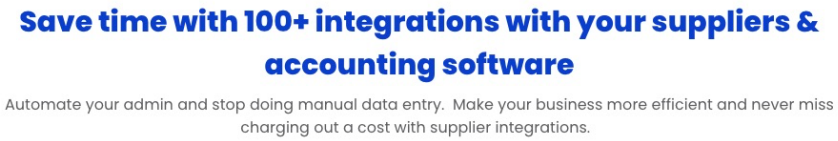
Customer invoice payment with one click

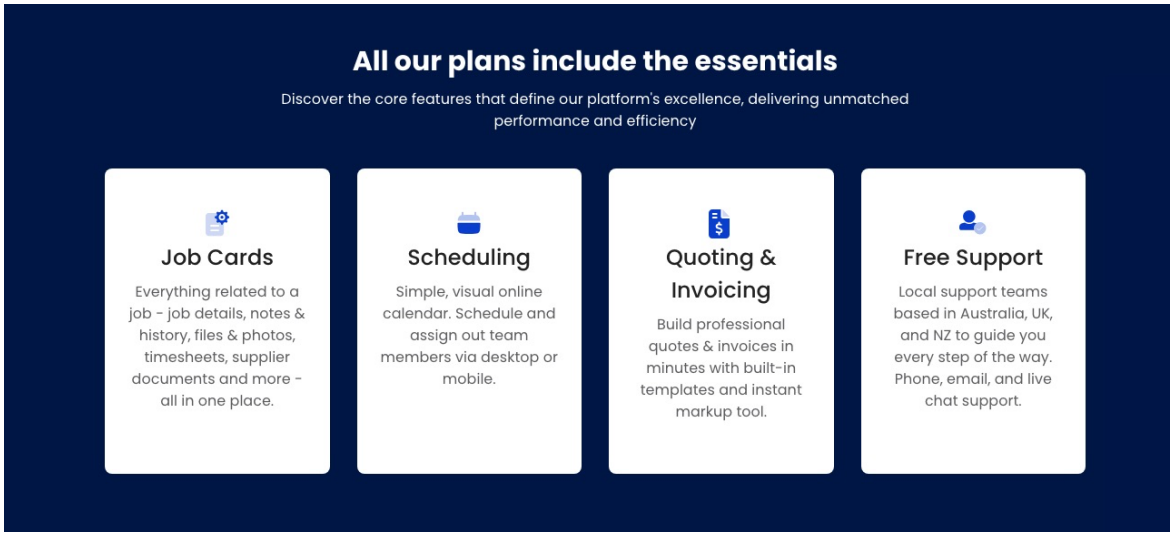
©ICB 2024

Value for Money

In my opinion this software will pay for itself from the first use, it is on a per user basis and there is a free trial

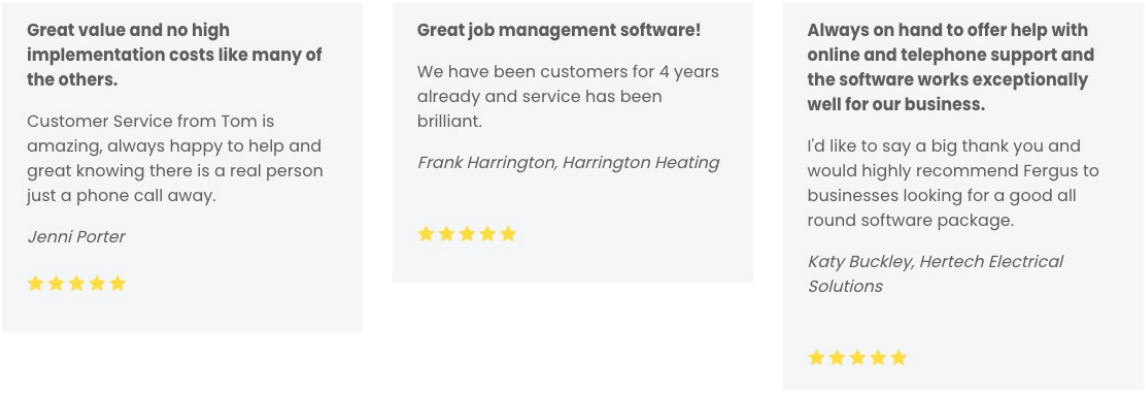






	Essentials	Pro
Monthly Price	£35 per user / per month *Free for apprentices OPTION: £1.50 per contractor/daily	£45 per user / per month *Free for apprentices OPTION: £1.50 per contractor/daily
Job Management		
Quoting & Estimating	✓	✓
Mobile App	✓	✓
Pricebooks	✓	✓
Job Cards	✓	✓
GPS Tracking	✓	✓
Timesheets	✓	✓
Calendar	✓	✓
Certificates	✓	✓
Materials	✓	✓
Supplier Integrations	Manually uploaded	Automated
Recurring Events	✓	✓
Moving Items	✓	✓
Checklists	✓	✓
Forms	×	✓
Communications		
Files & Photos	✓	✓
Customer email alerts	✓	✓
Noticeboard	✓	✓
Notes & History	✓	✓
Tasks	×	✓
Cashflow		
Invoicing	✓	✓
Payments	✓	✓
Purchase Orders	×	✓
Tiered Pricing	×	✓
Payroll Export	✓	✓
Health & Safety		
Hazards	×	✓
SWMS	×	✓
Reporting		
Job Reporting	✓	✓
Business Reporting	×	✓
Integrations & Add-ons		
Xero & QuickBooks	Automatic sync	Automatic sync
Credit card payments	1.6% + £0.20 per transaction	1.6% + £0.20 per transaction
Sign-Off	£25 for 1-9 staff, £50 for 10+ staff	£25 for 1-9 staff, £50 for 10+ staff
SMS alerts & reminders	£8 per 100 texts	£8 per 100 texts
Training	✓	✓
Support	Email & Chat Support	Phone, Email & Chat Support

Testimonials



Summary of Review

This doesn't happen very often, but I am actually very impressed with this software. It definitely is the solution to a lot of problems faced by trades in one piece of software. The trades usually would rather get on with the job and earn money rather than face paperwork, but this software makes it a quick and painless procedure and will help keep them compliant.

It also helps them appear to be professional in front of the customer

The greatest recommendation I can make is that I have already recommended this to some of my clients as a potential way forward for them. It will also make the life of the bookkeeper easier and there is a paper trail and a drill down facility.

The mobile app is useful but you also have the desktop version.

This software has the whole process from start to finish in one package – well done Fergus

Disclaimer

The Institute of Certified Bookkeepers having reviewed Fergus software package and cannot be held responsible in any way for the actions of the company or their software. This review is merely an unbiased overview of the software package. Any enquiries should be directed to Fergus