



The Institute of Certified Bookkeepers

Institute of Certified Bookkeepers Software Review

Helen Buck
Accounting On Us



18th June 2024

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.

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.

Getting Started with Fergus

Watch a quick overview of how Fergus works and how it can help your business. [Watch the video](#)

Getting Started

82% complete

4 simple steps to get you up and running with Fergus in no time.
(Approx. 30 mins)

✓

Welcome to Fergus


✓

Add your business details

✓

Connect accounting tools

View training resources



We'll show you the ropes

Book a FREE 20-30 minute online session with your personal account manager.

Request a free demo

View training resources

Fergus is here to make tradespeople's lives easier. With Fergus, you can streamline your business. Cut admin time, keep organised, manage costs, and get in total control of your business. Check out these resources to get started!

Training Videos

How-to videos to help you get up and running quickly with Fergus

View

Onboarding Checklist

Your go-to checklist with recommended first steps

View

Help Centre

Detailed articles to guide you through using Fergus

View

Live Chat

Have questions or feedback? We're here to help. Talk to a Fergus team member

Start Chat

Skip step

Complete

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.

Customer Details

Customer/Company Name

Freddy

✓ Customer name is unique

Physical Address

Address

125 Exeter Road

Suburb

Example Town

City

Exmouth

County

Example County

Postcode

EX8 1JA

Country

United Kingdom

Postal Address

☒ Same as physical address

Customer Settings

Use these settings to override them for this customer

Payment Terms

Use company default

Charge Out Rate

£ 75

Material Discount

0

%

Labour Discount

0

%

Custom Tax Rate

15

%

Disable Invoice Reminders

Use Company Default

Contacts

Default Main Contact

First Name

Freddy

Last Name

Smith

Title/Position

Manager

Email

Billing Contact

☒ Same as main contact

+ Add Contact


Cancel

Save Customer

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

Price Books



Importing supplier Price Books into Fergus 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.

+ Add Supplier

Drag & drop your supplier price book CSV files here or

Choose Files...

Custom Price Book

 Edit Custom Price Book

Price Book Settings

Price book search default supplier:

Custom Price Book Items

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.

Pens and Pencils Stationers

Exmouth

Devon, EX8 1NS

Site Address

Exmouth

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.

Estimate from ICB Reviewer - Partner Test Account

IR

ICB Reviewer - Partner Test Account <no-reply@mail.fergus.com>

To: [REDACTED]

PDF

Estimate FERG-3 (V...

38.8 KB

Download All

Preview All

To protect your privacy, some pictures in this message were not downloaded.

Hi Freddy

Thank you for your interest in working with us.

Please see the estimate attached for 12 [REDACTED]

Accept this estimate

Decline this estimate

Please note that this estimate expires on 27/07/2024.

If you have any questions please contact us on [REDACTED]

Thanks

ICB Reviewer - Partner Test Account

If you'd like to unsubscribe and stop receiving these emails [click here](#).

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

Job Summary

0 notes for this Job [Click to add or view all](#)

Customer

Pens and Pencils Stationers

Main Contact

Helen Buck (Owner)

Site

Helen Buck

0 notes for Pens and Pencils Stationers [Click to add or view all](#)

Job Details

Job Description

Lights in the dining room need moving so they are over the table

Customer Order Number

For Customer Reference Only...

Budget

£0

Payment Terms

30 Days

Group Tracking

Assign a job group

Job Phases

Create Job Phase

STATUS	JOB PHASE	TITLE	DESCRIPTION	TOTAL COST	TOTAL SELL	CREATED
TO INVOICE	FERG-1a	Move 3 Downlights	Lights in the dining room need moving so they are over the table	£0.00	£1,250.00	29/05/2024

Variations

This job contains the following variations

Add a Variation

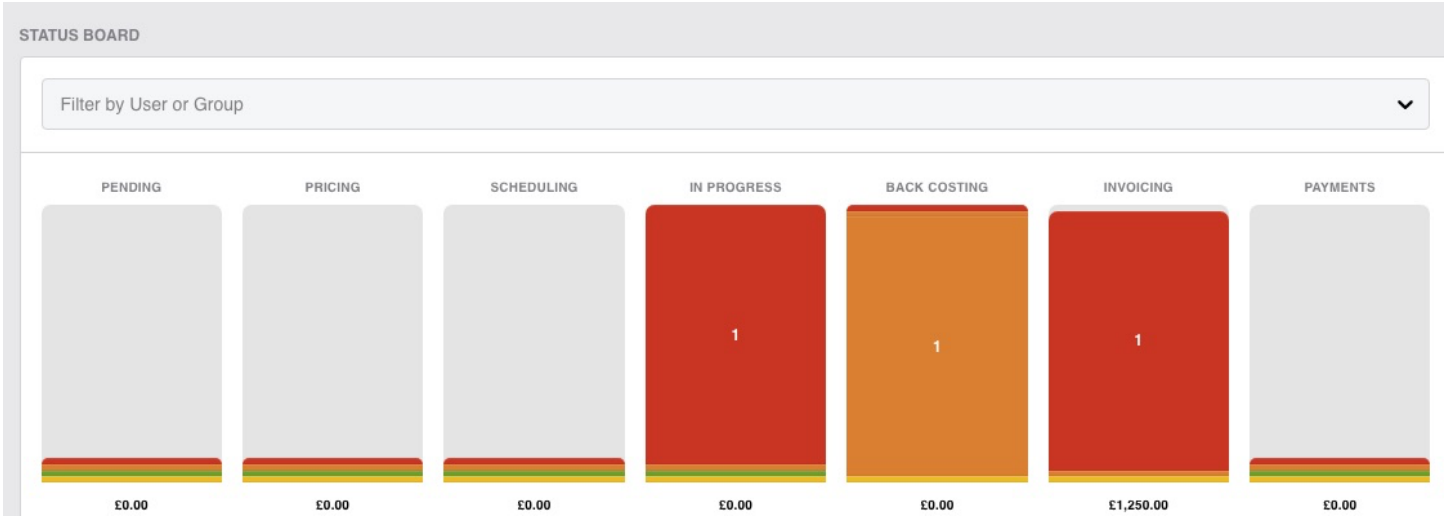
JOB TYPE	STATUS	JOB	TITLE	CREATED
No data available				

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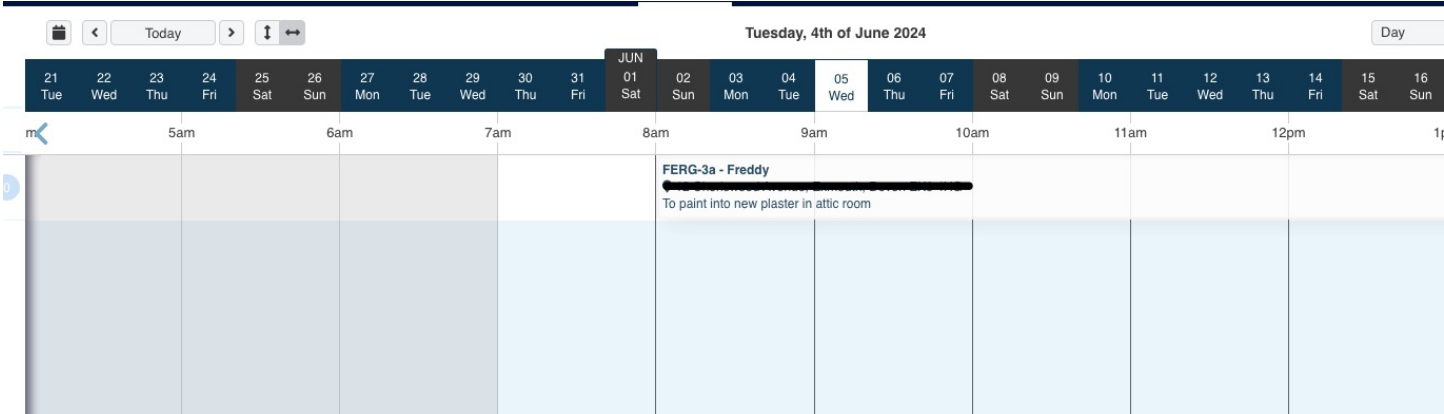
7

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



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

New Event


QUOTE


TO START

Open

FERG-2a - Move 3 Downlights

To move existing downlights to above the dining room table

 Pens and Pencils Stationers

 12 Cheriswood Avenue, Exmouth, Devon EX8 4HS

Show Site Contact

Event title *

FERG-2a - Pens and Pencils Stationers - 12 Cheriswood Avenue, Exmouth, Devon I

Date

19/6/2024

Time

08:00 AM

to

Time

09:00 AM

Date

19/6/2024

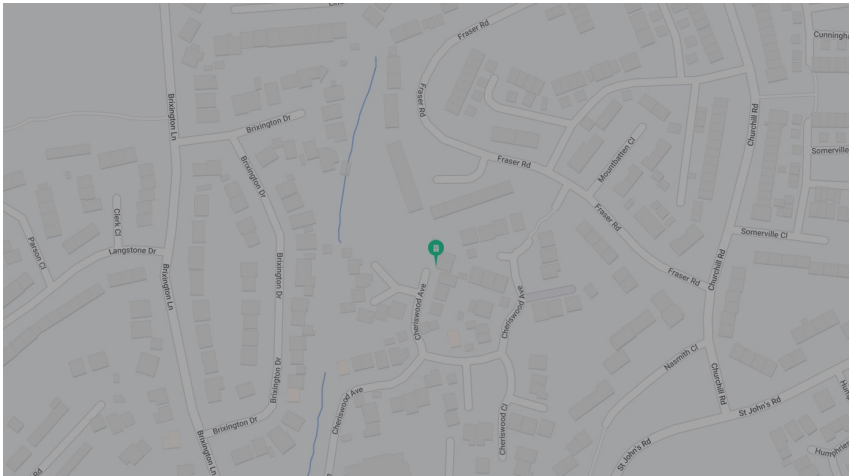
Duration: 1 hour

☐ This is a recurring event

Assign staff



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.

FERG-2 - Move 3 Downlights

QUOTE ACTIVE TOT - ACCEPTED

0 Notes0 VariationsPens and Pencils Stationers0

Job Settings

Invoicing

Invoice from Quote

Total Quoted £283.50 + VAT | Total Claimed £0.00 + VAT | Total Unpaid £0.00 | Total Paid £0.00

You are using sample business information

Please update your business information and bank account details before sending quotes or invoices.

Update business details

Invoicing

INVOICING	TYPE	DELIVERY	STATUS	CREATED	SUBTOTAL	TOTAL (WITH TAX)	
No data available							

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

Select Costs

×

Jobs

Costs (0)Quote (1)Previous Invoices (0)

FERG-2 (This Job)

Move 3 Downlights

ACTIVE

Select

Item

Cost

Markup

Charge Out

Invoice

50

% of a quote

£71.25

98.95%

£141.75

Invoice remainder of the quote

\$-

-%

£283.50

Quote Sections

Select All

£142.50

98.95%

£283.50

Add Electric Sockets

£142.50

98.95%

£283.50

> Importing Options: Include outstanding credit line items

Selected Items

Remainder of quote for FERG-2 has been added

▼ Quotes/Estimates (1)

Name

Cost

Markup

Charge Out

Remainder of FERG-2 as quoted

-

-

283.5

×

Cancel

Add £283.50 to Invoice

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

Pens and

ATTN: Op

Pens and

12 Cherisv

Exmouth

Devon, EX

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

<input type="checkbox"/> Name	Quantity	Cost	Price	Markup	Tax	Discount	Total
<input type="checkbox"/> Remainder of labour and materials as quoted	1.00	£0.00	£283.50	0.00%	20%	0%	£283.50
		£0.00					£283.50

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Hide Letterhead



ICB Reviewer - Partner Test Account
Accounting On Us Bookkeeping Ltd
Exmouth, Devon EX8 4HG
helenbuckiphone@googlemail.com
07736297848

DRAFT

Pens and Pencils Stationers ▾

ATTN: Optional

Pens and Pencils Stationers
12 Cheriswood Avenue
Exmouth
Devon, EX8 4HG

Site Address

12 Cheriswood Avenue
Exmouth
Devon EX8 4HG

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

+

🗑️

<input type="checkbox"/> Name	Quantity	Cost	Price	Markup	Tax	Discount	Total
<input type="checkbox"/> 📦 Remainder of labour and materials as quoted	1.00	£0.00	£283.50	0.00%	20%	0%	£283.50 X
		£0.00					£283.50

Add a Line Item

Price Books ▾

Add from Favourites

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.

FERG-2 - Move 3 Downlights

QUOTECOMPLETEDTOT - ACCEPTED

0 Notes0 VariationsPens and Pencils Stationers0Helen Buck

Job Settings

Notes and History

NotesQueriesEmailsLogsSms

Search History...

All Time

Add a manual log entryAdd log entry

Tuesday, 18 June 2024

12:13amJob moved to status: Completed

12:11amCreated Invoice INV-04000

12:11amJob Phase A forcibly moved to status: Invoiced

12:04amScheduled FERG-2a for an unassigned employee at 18/06/2024 8:15am

12:03amHelen was marked as labour complete

12:03amMarked FERG-2a as To Invoice

12:03amJob Phase A forcibly moved to status: To Invoice

12:02amScheduled FERG-2a for an unassigned employee at 19/06/2024 8:00am

Wednesday, 29 May 2024

6:18pmScheduled FERG-2a for Helen at 01/06/2024 8:00am

6:18pmJob Phase A moved to status: To Start

6:18pmFERG-2a - Helen assigned by Helen

5:47pmTerms of trade and Quote v1 accepted via email by Helen Buck

5:47pmJob forcibly moved to status: Active

5:47pmCreated a New Job Phase: FERG-2a Move 3 Downlights

5:47pmOn FERG-2I Created 2 weeks ago (29 May 2024)

Quote Brief for version 1.pdf

EditDeletePin

5:41pmQuote Created. View

5:41pmJob moved to status: Quote Sent

5:41pmEmail sent to

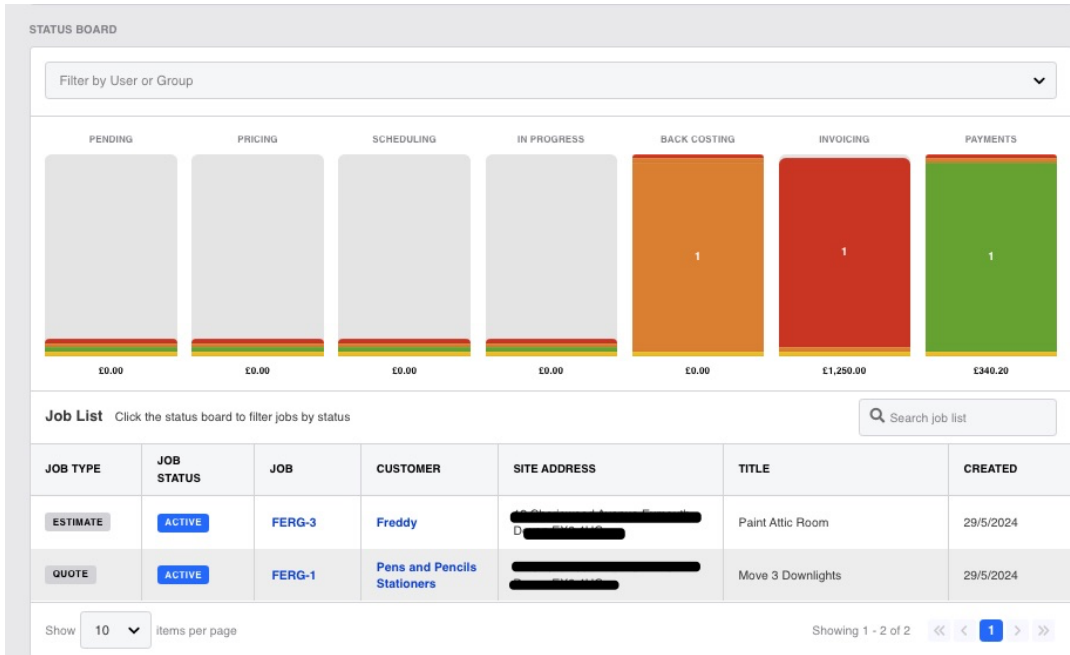
Subject: Quote from ICB Reviewer - Partner Test Account

Click to view email

5:40pmQuote v1 published by Helen

5:14pmQuote created by Helen

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

Reports

Invoicing

- Customer Invoice Report
- Fergus Pay Report

Staff

- Pay Summary Report
- Timesheet Overview

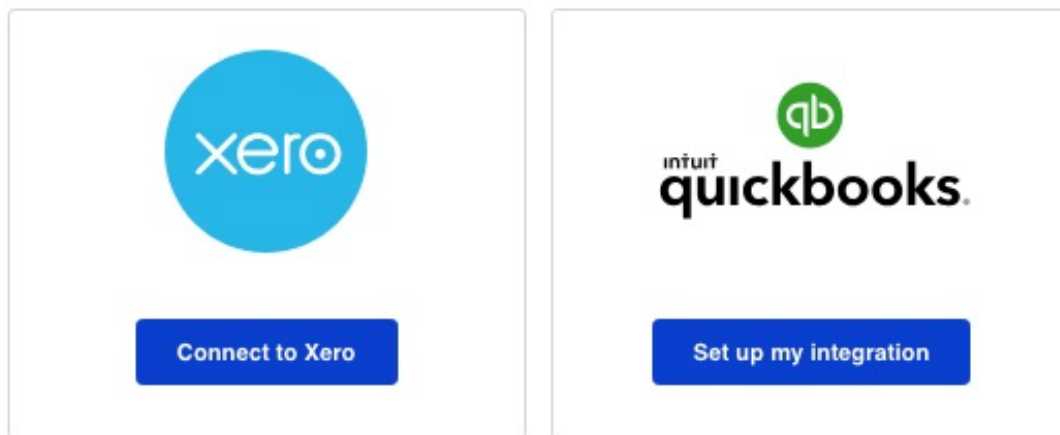
Jobs

- Recurring Jobs
- Certification Report

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

Connect accounting tools

Eliminate the cost of double-handling and human errors by integrating Fergus with your accounting tools. Simply sign in to your accounting software and Fergus will sync all your business and customer information to get you up and running in no time. During your Fergus trial, you can sync with real data but don't worry Fergus won't change any accounting data unless you tell it to.



[Skip step](#)

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

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

Plans for every size and stage of your business

Whether you're just starting out or growing a team, Fergus has your back. We support everyone from sole traders to established businesses.

Essentials

Best for small teams & one-man bands

£35

per user / per month

[View all features](#)

Pro

Best for teams larger than 5 staff

£45

per user / per month

[View all features](#)


[Start Free Trial](#)

Save time with 100+ integrations with your suppliers & accounting software

Automate your admin and stop doing manual data entry. Make your business more efficient and never miss charging out a cost with supplier integrations.


All our plans include the essentials

Discover the core features that define our platform's excellence, delivering unmatched performance and efficiency




Job Cards

Everything related to a job - job details, notes & history, files & photos, timesheets, supplier documents and more - all in one place.




Scheduling

Simple, visual online calendar. Schedule and assign out team members via desktop or mobile.



Quoting & Invoicing

Build professional quotes & invoices in minutes with built-in templates and instant markup tool.



Free Support

Local support teams based in Australia, UK, and NZ to guide you every step of the way. Phone, email, and live chat support.

👤 Essentials

👤 Pro

Monthly Price	£35 per user / per month <small>*Free for apprentices</small>	£45 per user / per month <small>*Free for apprentices</small>
	OPTION: £150 per contractor/daily	OPTION: £150 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

Great value and no high implementation costs like many of the others.

Customer Service from Tom is amazing, always happy to help and great knowing there is a real person just a phone call away.

Jenni Porter



Great job management software!

We have been customers for 4 years already and service has been brilliant.

Frank Harrington, Harrington Heating



Always on hand to offer help with online and telephone support and the software works exceptionally well for our business.

I'd like to say a big thank you and would highly recommend Fergus to businesses looking for a good all round software package.

Katy Buckley, Hertech Electrical Solutions



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