

Software Review

Conducted by Lara Manton MICB, LJM Bookkeeping



The Reviewer

Lara Manton runs LJM Bookkeeping. Specialising in Xero and building an eco-system of apps to help clients become as efficient as possible. Shortlisted for Xero Sole Practitioner of the Year 2021, Accounting Excellence Sole Practitioner and Bookkeeping Team of the Year 2021, and winner of ICB's Small Practice of the Year 2021. Lara came across NextMinute when looking for a solution for several landscape gardening clients.

Company Background

NextMinute was founded in 2015, originally based out of Auckland, New Zealand. It was launched in 2016 where it had a formal integration and partnership with New Zealand's largest trade supplier of building materials - PlaceMakers.

It now has 2,500 customers in New Zealand, Australia, UK, Canada and the US. It was officially launched in the UK market this year, but has had UK based customers since 2018. Andrew Moore was appointed as the UK country manager to spearhead the growth of the team and the business to support out customers and partners in the UK. The team is dedicated to the success of the software and the customers journey into the use of technology to improve their businesses. They currently have a team of 15 across senior management, sales, customer and partner support, product management and marketing. However, they are still growing and are currently recruiting for another role in the UK to build the team to close out 2021.

It was shortlisted for Client App of the Year at the 2021 LUCA Awards.

The Product

Overview

NextMinute is marketed at the construction and trade industries, as a job management software. However, it is much more than that. It could apply to many more industries that work on a job or project basis, especially if they use 3rd party contractors that submit timesheets, stage payments, and have a lot of external costs. If your clients need more than the basic Xero projects, with a more user-friendly setup and better user experience than WorkFlowMax, then look at NextMinute.

It covers multiple areas that might be pain points for your clients - job scheduling (and a calendar view to make sure they're not double-booking themselves), quoting (which works both on mark-up and time and cost basis), timesheets, invoicing, CRM, cost management, which all leads to job profitability. However, it is something you need to work with your clients to set up, as there are various bits of information you will require, that you probably won't have access to.

It is a cloud-based software, which is where most of the features lie, but for subcontractors on the go, there is also an Android and iPhone app. This means there is no excuse for subcontractors to log their time in real-time. It also means information on jobs can be added when they are at an initial client visit, speeding up the whole process. It also works equally as well on Macs or iPads as PCs.

Features

TIMESHEETS:

If you're used to dealing with clients who have subbies, you will know how it can be a struggle to get the information off them at month end to do CIS returns. Often when you do, it will be paper-based and lack information such as the jobs they've worked on. This is one of the main headaches that NextMinute looks to eliminate. After allocating a team member to a job, they then can add their time for that particular job, either adding it in as a duration or via the stopwatch feature on the app. Not only that, but they can add a before and after or stage photo, meaning that if the customer queries the work, you have some proof of what was done. They try to encourage team members to submit their timesheets as they go, meaning there is less chance of someone forgetting and no month-end last-minute panic. If enabled, time tracking also has a GPS feature, again good for proving visits have been made especially when the customer isn't home at the time. This feature can also be helpful for job scheduling and efficiency planning, if you are seeing team members zigzag all over the place, route and visit planning can be looked at. Time tracking doesn't need to be just on billable jobs, you can also set up internal and non-billable tasks, such as heading to a builder's merchants, or a site visit for quoting. Each team member can have a different hourly rate as well as different billable rates based on subcontractor or task.

Timesheets

Previous Week

Next Week

My Timesheets

Report

Lock Timesheet

Mon 1 Nov - Sun 7 Nov

Weekly Total - 37 Hours = £1,925.00

Monday 1 November	3hr	+	Tuesday 2 November	0hr	+
Wednesday 3 November	6hr	+	Thursday 4 November	8hr 30min	+
Friday 5 November	8hr	+	Saturday 6 November	2hr 30min	+
			Sunday 7 November	9hr	+

Monday 1 November

Add +

TASK-130 - Weekly garden maintenance

JOB-107 - Garden Maintenance /Recurring

3 Saint John's Hill
London
England
SW11 1TT
United Kingdom

3hr

Invoiced Billable

Weekend Overtime Rate

Daily total: 3 Hours

Tuesday 2 November

Add +

TASK-130 - Weekly garden maintenance

JOB-107 - Garden Maintenance /Recurring

3 Saint John's Hill
London
England
SW11 1TT
United Kingdom

6hr

Invoiced Billable

Standard Hourly Rate

Standard hourly rate.

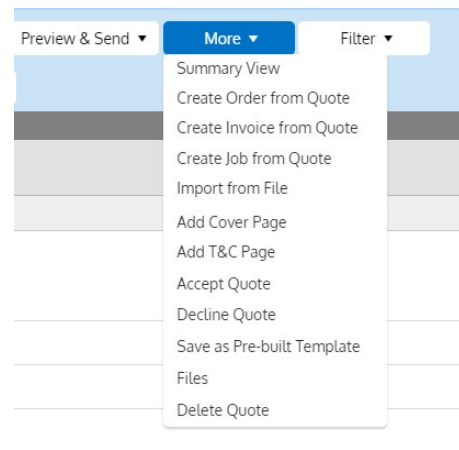
Daily total: 6 Hours

ICB SOFTWARE ACCREDITATION
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QUOTING/INVOICING:

From within the Accounts sections, you'll find the quoting and invoicing. NextMinute can quote on a cost+ basis (taking a supplier invoice and marking it up) or on a time and value basis. There is the function to import items (if working off the latter) to form a price list. These are then broken down into labour, materials, and disbursements. Even if using one of the items they can tweak it on the quoting page. For those clients that prepare bigger proposals, you can include a cover page as well as Terms and Conditions. You can also duplicate & amend previous quotes if you're doing a similar job again or create a template if it is a regular job. The bottom of the job will show approximate profit and profitability percentage if using a mark-up basis. As with most invoicing software, you can add your logo and customise the documents slightly to meet your needs and work to your theme.



Details for Estimate Only QUOTE-104

Details

Total Labour Qty: 6.75 Total Cost: £490.25 Total Revenue: £726.25

Click here to add a section description...

Type	Item	Description	Qty	Units	Buy Price	Markup%	Sell Price	Amount	
L	Standard Hourly Rate		4.50	hour	50.00	70.00%	85.00	382.50	
L	After Hours Callout Rate		2.25	hour	95.00	21.05%	115.00	258.75	
D	Travel Charge		7.50	km	1.00	100.00%	2.00	15.00	
Tag M	50MM 90o COPPER BEND		2.00	item	22.00	59.09%	35.00	70.00	

Drag to reorder items

+ Add a new item

Click to edit the footer notes...

Change Margin

Save

Cancel

The current margin is 32.5%.
Please enter the desired margin for QUOTE-104.

Desired Margin

32.5

Please note:
On Save, this will change the markup on all line charge items to achieve your desired margin.

Quote Totals	Qty	Total Cost	Total
Total Labour	6.75	£438.75	£641.25
Total Materials		£44.00	£70.00
Total Disbursements		£7.50	£15.00
Total Other		£0.00	£0.00
Subtotal		£490.25	£726.25
Total VAT			£145.25
Quote Total			£871.50
Margin			32.5%
Profit			£236.00

Once a quote has been prepared, it can be turned into a job, invoice, or even copied to a purchase order if your client works off those. Quotes can be emailed to multiple recipients as well. When emailed they appear to come from your email (complete with the same footers if needed) with a message that can be personalised, a pdf copy of the quote, and a button that takes the customer to a page to accept or decline the quote, along with any notes. The quotes summary page shows the status of quotes, when they were sent and can be filtered on a variety of options.

Quotes - No filters active										11 quotes
Drag a column header and drop it here to group by that column										
<input type="checkbox"/>	Quote No.	Customer	Job	Task	Reference	Status	Total	Amount Invoiced	Amount Remain	
<input type="checkbox"/>	QUOTE-1002	Lara				Accepted	£14,813.40	£6,669.60	£8,143.80	
<input type="checkbox"/>	QUOTE-1001						£0.00	£0.00	£0.00	
<input type="checkbox"/>	QUOTE-1000	Justine Date			893		£19,811.21	£0.00	£19,811.21	
<input type="checkbox"/>	QUOTE-103	Marcus Godwin	JOB-102: Service Job #336		JOB-1002		£1,384.80	£1,384.80	£0.00	
<input type="checkbox"/>	QUOTE-105	Robert Johnson	JOB-101: Building Renovation Job		JOB-1001		£14,324.30	£0.00	£14,324.30	
<input type="checkbox"/>	QUOTE-102	James Williams	JOB-103: Landscaping Job		JOB-1000		£848.40	£848.40	£0.00	
<input type="checkbox"/>	QUOTE-100	James Bond	JOB-107: Garden Maintenance / Recurring		Order No. ON1003, Job103		£1,221.60	£0.00	£1,221.60	
<input type="checkbox"/>	QUOTE-107	Marcus Godwin	JOB-106: Garden Maintenance		Job102	Accepted	£1,323.00	£0.00	£1,323.00	
<input type="checkbox"/>	QUOTE-106	Marcus Godwin	JOB-106: Garden Maintenance		Job102	Expired	£62,025.00	£0.00	£62,025.00	
<input type="checkbox"/>	QUOTE-101	John Smith	JOB-105: Electrical Job/Repair		Order No. ON1001, Job101		£1,147.20	£2,779.20	-£1,632.00	
<input type="checkbox"/>	QUOTE-104	Lois Lane	JOB-104: Hedge and Lawn maintenance		Job100	Expired	£871.50	£0.00	£871.50	
<div> < > 1 < > 50 ▼ items per page </div> <div>1 - 11 of 11 items</div>										

Once accepted, you can turn the quote into an invoice. This takes you through several options, such as if you want to include all items, have the quote as a summary or line items, and if you want to invoice part or all of the total. If the former, you can choose a percentage or set amount. Great for those clients who invoice in stages such as 25% at the start, or even if it's round amounts as you go through. Invoices have the option to have a remittance advice attached for those that like them or have customers paying by cheque. There isn't the ability to have payment services, such as Stripe, but if you create the invoice but send it from Xero instead, then you could work around that. Invoices are broken down by jobs and tasks, so show line items, section totals, and invoice totals, but could be simplified or tweaked depending on need. The preview button lets you see what the customer will see when it arrives as it does look slightly different on the screen.

Create Invoice ×

Back

Which items do you want to include in the invoice?

All items

Selected items

Create Invoice ×

Back

Do you want to keep the items in individual sections?

Keep individual sections

Combine all items into one section

Create Invoice ×

Back

Do you want to invoice the full amount?

Full amount

Part amount

Create Invoice ×

OK

Back

Invoice part amount of Quote Charges

Summary of Quote Charges for selected items

Total of selected items	£956.00
Amount already invoiced	£2,316.00 (242.26%)
Amount remaining	-£1,360.00 (-142.26%)

How much do you want to invoice?

☒ % of Amount Remaining

☐ Amount \$

Part invoicing apportions the amount to be invoiced over all of the line items by adjusting the quantity of each line item proportionally.

This leads to necessary rounding adjustments.

Invoice (with payment)

To: James Bond
Saint John's Hill
London
England
SW11 1TT
United Kingdom

Invoice Number
INV-103

Reference
Job103

Invoice Date
19 Oct 2021

Due Date
26 Oct 2021

Please note: Payment is due within 7 days of invoice.

Details

Name/Description	Qty	Units	Unit Price	Disc	Amount
Standard Hourly Rate	4.50	hour	85.00		£382.50
After Hours Callout Rate	2.25	hour	115.00		£258.75
Travel Charge	7.50	km	2.00		£15.00
Karcher Glass Cleaner Concentrate 4X20ML	4.00	item	21.00		£84.00

Subtotal £740.25

Total VAT 20.00 % £148.05

Total GBP £888.30

LESS Amount Paid £500.00

Amount Due GBP £388.30

Due Date: Tuesday, October 26, 2021

JOBS/TASKS:

NextMinute is billed as job management, so there are a lot of features around this. Each job can be broken down into multiple tasks and both of these live in their own sections. The job section allows you to see at a glance what is currently happening, what stage jobs are in (good for keeping an eye on jobs finished but not invoiced), and the financials for those jobs.

There is a separate section for internal jobs and an archive for jobs that have been completed. The job section in the left-hand menu allows you to quickly see how many unscheduled or overdue jobs you have as well as listing them completely separately in those views so that you can keep on top of all work and deadlines.

Jobs - All Jobs

Search for...

List View Grid View Map View

Add Add Using Template Refresh More

Filters

No filters active 7 jobs

JOB-1000 - garden maintenance

Start: Mon 1 Nov 2021 9:00 am

Type: Garden Maintenance Pricing: Fixed Price

James Williams
London
England
SW1 000
United Kingdom

Assignees LM

Unbilled: £2,416.50

JOB-104 - Hedge and Lawn maintenance

Due: Tue 19 Oct 2021

Type: Lawn Mow Priority: Medium Status: Ready to Invoice

Pricing: Time & Materials Tentative

1 Queen St
Auckland

Assignees LM

Unbilled: £2,416.50

JOB-107 - Garden Maintenance /Recurring

Due: Sun 24 Oct 2021

Type: Garden Maintenance Priority: Medium Status: New

Pricing: Time & Materials Accepted

James Bond
3 Saint John's Hill
London
England
SW11 1TT
United Kingdom

Assignees LM

Unbilled: £723.50

JOB-106 - Garden Maintenance

Due: Thu 18 Nov 2021

Type: Garden Maintenance Priority: Medium Status: In Progress

Invited

Marcus Godwin
77 Queen's Road
London
England
SW19 8NR
United Kingdom

Assignees LM

Unbilled: £13,825.25

JOB-102 - Service Job #336

Due: Wed 15 Sep 2021

Type: Lawn Mow Priority: High Status: New

Pricing: Time & Materials Invited

Marcus Godwin
77 Queen's Road
London
England
SW19 8NR
United Kingdom

Assignees LM ST

Unbilled: £1,154.00

JOB-103 - Landscaping Job

Due: Wed 27 Oct 2021

Type: Custom Priority: Medium Status: In Progress Invited

James Williams
82 Grattan Street
Carlton
Melbourne
Australia

Assignees LM

Unbilled: £723.50

Clicking on any job takes you to the full details for that job, allowing you to go into anything that might be linked to it as well as showing you notes, and all details that you may need to know about it.

As with most views, there is a multitude of filters you can turn on to customise what you are seeing on the summary page.

The screenshot displays three components of the software interface:

- Job Details Panel (Left):** Shows details for 'Job JOB-104 - Hedge and Lawn maintenance'. It includes tabs for 'Edit', 'More', and 'Reports'. Below these are links for 'Scheduled Tasks (3)', 'Linked Contacts', 'Photos (3)', 'Notes (1)', 'Scribbles (1)', 'Files (3)', 'Charges (£6,199.00)', 'Quotes (1)', 'Invoices (2)', 'Orders', 'Supplier Invoices (1)', and 'View Job Sheet'. A 'Tentative' status is highlighted with a note: 'Not sure if I can make it. Can you remind me the day before!'. Other details include 'Job Type: Lawn Mow', 'Pricing Type: Time & Materials', 'Job Status: Ready to Invoice', and 'Customer: No customer assigned'.
- Filters Panel (Middle):** A 'Filters' dialog box with a 'Clear Filters' button. It contains a list of filterable fields, each with an 'OFF' toggle: Status, Type, Pricing Type, Priority, Customer, Assigned To, Due Date, Unscheduled Jobs, Internal Jobs, Archived Jobs Only, and Active & Archived Jobs.
- Sidebar Menu (Right):** A vertical menu with a 'Jobs' header and a list of categories: 'All Jobs (7)', 'Internal (1)', 'Unscheduled (0)', 'Overdue (4)', and 'Archived (2)'.

The task view only shows the scheduled tasks and is broken down into daily, weekly, monthly, or you can view all tasks or the archive. You can also add a priority to certain jobs so that everyone knows what is most important to complete. New jobs have their own coloured label, so you can always see when something has been added to your list. Multi-day tasks or jobs also show as 'in progress' and there is the ability to have a job penciled in, by using the 'unconfirmed' tag. This all reduces the chance of doubling booking or leaving a customer waiting. Tasks can also be recurring on a daily, weekly, monthly, or yearly basis, which is good if you're dealing with regular maintenance. When you amend a recurring job or task you can amend that instance, all future instances, or the entire series.

Drag a column header and drop it here to group by that column									
	Assigned To	Title	Start Time	End Time	Address	Job	Customer	Status	Prio...
	BR	Hedge Trimming	Fri 8-Oct-2021 9:22 am	Fri 8-Oct-2021 10:22 am	3 Saint John's Hill London England SW11 1TT United Kingdom	JOB-107: Garden Maintenance /Recurring	James Bond	In Progress	
	LM RJ	Interior Painting	Sun 10-Oct-2021 9:22 am	Sun 10-Oct-2021 2:22 pm	77 Queen's Road London England SW19 8NR United Kingdom	JOB-102: Service Job #336	Marcus Godwin	Complete	High
	BR	Yard and office work	Mon 11-Oct-2021 9:22 am	Mon 11-Oct-2021 10:22 am		JOB-100: Internal Admin Job		In Progress	
	LM	Gas repair	Wed 13-Oct-2021 8:22 am	Wed 13-Oct-2021 10:22 am	1 Queen St Auckland	JOB-104: Hedge and Lawn maintenance		New	Medium
	BR	Task for Job Job100 - Plumbing Job/Gas repair	Sun 17-Oct-2021 9:22 am	Sun 17-Oct-2021 10:22 am	1 Queen St Auckland	JOB-104: Hedge and Lawn maintenance		Heading to Site	
	JS LM	Site Preparation and Foundations	Mon 18-Oct-2021 11:22 pm	Wed 10-Nov-2021 10:22 pm	77 Queen's Road London England SW19 8NR United Kingdom	JOB-106: Garden Maintenance	Marcus Godwin	In Progress	Medium
	SS	Training	Tue 19-Oct-2021 9:22 am	Tue 19-Oct-2021 10:22 am		JOB-100: Internal Admin Job			Low

COSTS/REPORTING:

Once synced with Xero (and ideally Hubdoc, Dext, or AutoEntry as the first step of the process) the supplier bills pull through. In a matching system much like Xero's own bank reconciliation screen, each bill can be matched to a job or task. From there you can either add it as a charge or create an invoice from the bill. Once you are happy with the bills, you can click the button to import them into the system. Bills can also be added manually or imported as required. If you have raised a purchase order, then this can be turned into a bill.

Add Supplier Invoice

Cancel

Quick Add

Blank Supplier Invoice

Using Pre-Built Template

Using Import File

Using Order

Import from...



Select Job or Task

Select Job

Select Task

Select Internal

TRAVIS PERKINS BILL - 0334 AWM253

Hide

Date: 2/11/2021

Due Date: 9/11/2021

1 Line Items

\$188.18

LONDON STONE PAVING BILL - 1 / 200073

Hide

Date: 3/11/2021

Due Date: 10/11/2021

1 Line Items

\$1,647.99

LONDON STONE PAVING BILL - 199653

Hide

Date: 1/11/2021

Due Date: 8/11/2021

1 Line Items

\$87.48

NextMinute Actions

SELECT JOB/TASK

Create Actual Charges

Create Invoice

Set Markup To, %

10

Line item charge type

Materials

Please Select a Job!

NextMinute Actions

SELECT JOB/TASK

Create Actual Charges

Create Invoice

Set Markup To, %

10

Line item charge type

Materials

Please Select a Job!

NextMinute Actions

SELECT JOB/TASK

Create Actual Charges

Create Invoice

Set Markup To, %

10

Line item charge type

Materials

Please Select a Job!

1 of 6 Selected Bill to Import

Import Now



Select All

Select None

NextMinute Import Actions

Include rounding errors in charges

Include rounding errors in invoices

TRAVIS PERKINS BILL - 0334 AWM253

Hide

Date: 2/11/2021

Due Date: 9/11/2021

1 Line Items

\$188.18

NextMinute Actions

Selected Job/Task

Create Actual Charges

Create Invoice

Set Markup To, %

10

Line item charge type

Materials

Ready to Import

NextMinute comes with a pretty extensive list of reports which live in their own section. There are 2 additional reports; back costing and financial summary, that can be run directly from within jobs. They are continually adding to this list, with a WIP report being the latest of these. The reports themselves pop up on the left and need to be zoomed in or maximised to see clearly. They are a mix of charts with figures or just figures only depending on the report. All reports can be printed as well as exported to PDF, CSV, Excel 97-2003, Excel worksheet, or Word. That means that reports can be collated, and manipulated in any way, or put together in a report pack if needed.

Job Reports	
Job Charge Summary by Type	>
View the summary of unbilled charges, quotes, orders, invoices and supplier invoices for unarchived jobs grouped by job type.	
Job Charge Summary by User	>
View the summary of unbilled charges, quotes, orders, invoices and supplier invoices for archived and unarchived jobs grouped by user.	
Job WIP Report	>
View the summary of current or historical Work in Progress (WIP) balances from costs vs invoiced records against jobs.	
Job Charges (Detailed)	>
View all charge details for selected jobs and group information by Task, User, Charge Type and Date.	
Timesheet Reports	
Payroll Report	>
View the timesheets by worker for payroll purposes.	
Timesheets by User	>
View the timesheets by user for payroll purposes.	
Timesheets by User by Day	>
View the timesheets by user and day for payroll purposes.	
Timesheets by Job	>
View timesheets grouped by Job.	
Timesheets by Job (Detailed)	>
View timesheet details for selected jobs and group information by Task, User and Date.	

Job Customer	Garden Maintenance Marcus Godwin	Report Date	07 Nov 2021
Job Number	JOB-106	Pricing Type	In Progress
Actual Labour (Hours)	178.75		
Estimated Labour (Hours)	452.50		
Labour Variance (Hours)	273.75		

All values are exclusive of Tax										
Breakdown	Estimated Cost	Actual Cost	Cost Variance	Estimated Revenue	Invoiced	Unbilled Charges	To Invoice	Gross Profit	Margin	Write off
	(Quoted Cost)	(Job Charges)	(Quote vs Actual)	(Quoted Revenue)	(Actual Revenue)	(Billable Charges)	(Quoted vs Invoiced)	(To date)	(To date)	(Non-billable Charges)
Labour	£22,825.00	£9,343.75	£13,281.25	£38,462.50	£40.20	£10,823.75	£38,422.30	£9,303.55	-23,143.16 %	£2,725.00
Material	£945.00	£2,271.50	£1,326.50	£1,337.50	£84.40	£2,982.50	£1,253.10	£2,187.10	-2,591.35 %	£0.00
Disbursement	£15.00	£9.50	£5.50	£30.00	£0.00	£19.00	£30.00	£9.50	0.00 %	£0.00
Other items	£12,960.00	£0.00	£12,960.00	£12,960.00	£0.00	£0.00	£12,960.00	£0.00	0.00 %	£0.00
Total	£36,545.00	£11,624.75	£24,920.25	£52,790.00	£124.60	£13,825.25	£52,665.40	£11,500.15	-9,229.65 %	£2,725.00



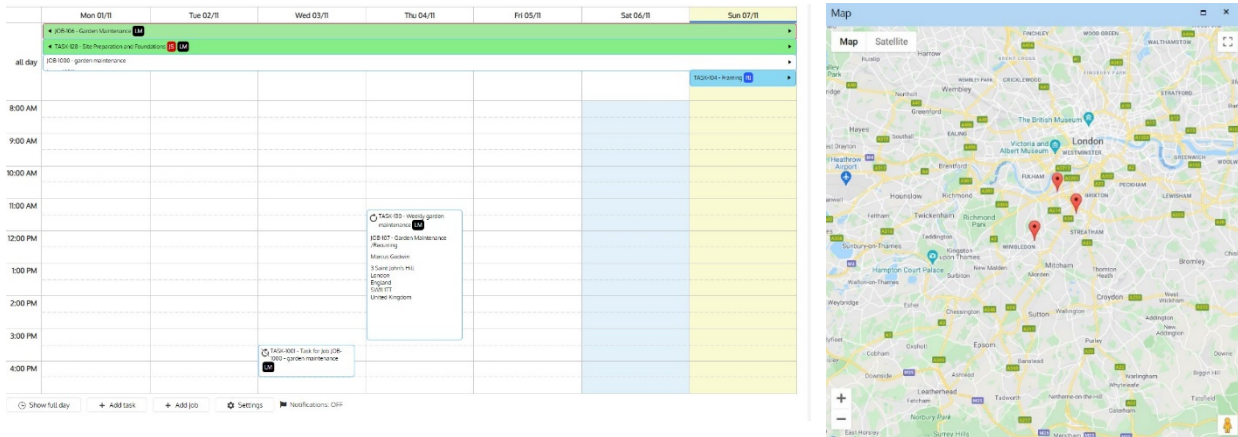
Summary

Job Count	7	Report Date	07 Nov 2021
Total Quoted	£56,395.25		
Estimated Cost	£38,971.25		
Total Costs	£36,009.00		
Target Invoiced	£43,152.94		
Total Invoiced	£28,944.35		
		WIP Balance	£14,208.59
		Unbilled Charges	£18,119.25

All values are exclusive of Tax												
Job No. & Name	Status	Unbilled Charges	Total Quoted	Estimated Costs	Total Costs	Write Off	Total Profit	Margin	% Complete	Target Invoiced	Total Invoiced	WIP Balance
		(Billable Charges)	(Quoted Revenue)	(Quoted Cost)	(Actual Charges)	(Non-billable Charges)	(Total Invoiced - Total Cost)		(Total Cost/Est Cost)	(Total Quoted * % Complete)		(Invoiced - Target)
JOB-107 Garden Maintenance /Recurring	New	£0.00	£1,018.00	£660.00	£8,645.75	£2,425.00	£13,475.00	60.92 %	1,309.96 %	£13,335.39	£22,120.75	£8,785.36
JOB-106 Garden Maintenance	In Progress	£13,825.25	£52,790.00	£36,545.00	£11,624.75	£2,725.00	£11,500.15	-9,229.65 %	31.81 %	£16,792.50	£124.60	£16,667.90
JOB-104 Hedge and Lawn maintenance	Ready to Invoice	£2,416.50	£726.25	£490.25	£3,746.50	£2,225.00	£1,091.50	22.56 %	764.20 %	£5,550.00	£4,838.00	£712.00
JOB-103 Landscaping Job	In Progress	£723.50	£707.00	£434.00	£2,980.00	£2,500.00	£2,273.00	-321.50 %	686.64 %	£4,854.54	£707.00	£4,147.54
JOB-102 Service Job #336	New	£1,154.00	£1,154.00	£842.00	£1,912.00	£1,175.00	£758.00	-65.68 %	227.08 %	£2,620.50	£1,154.00	£1,466.50
JOB-1000 garden maintenance		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	0.00 %	0.00 %	£0.00	£0.00	£0.00
JOB-100 Internal Admin Job		£0.00	£0.00	£0.00	£7,100.00	£7,100.00	£7,100.00	0.00 %	0.00 %	£0.00	£0.00	£0.00
Total		£18,119.25	£56,395.25	£38,971.25	£36,009.00	£18,150.00	£7,064.65	-24.41 %	92.40 %	£43,152.94	£28,944.35	£14,208.59

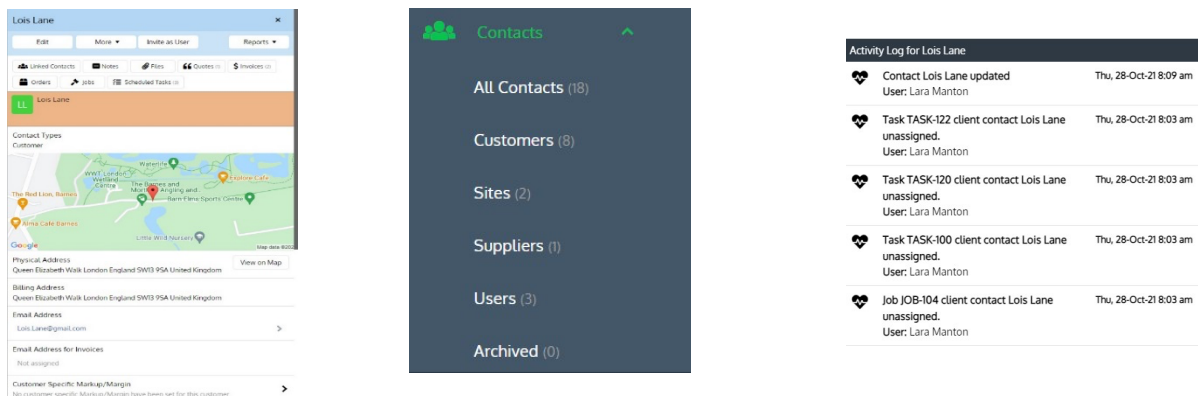
SCHEDULING/CALENDAR:

The calendar view allows you to see the jobs going on based on a week or month at a glance, or can be filtered to show more on an agenda basis. Consider this your diary as jobs can even have start and finish times to plan the whole day out. Admin users can see all users on the calendar, to make sure staff are being fully utilised, whereas team members will only be able to see the tasks they have been assigned to. The map view allows you to see where particular jobs are located, allowing you to plan routes and meaning that there should never be an excuse for not knowing where the customer is. As with all summary pages, you can click on the task, job, or client to go into more details.



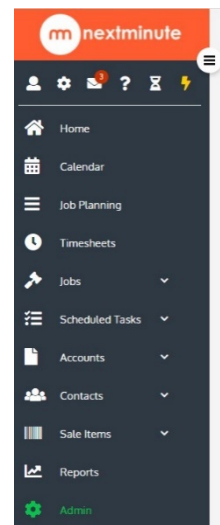
CRM:

It also works as a full CRM. You can make notes, send emails and messages, keep records of all visits and financials directly from within the system. You can even link customers (family members or referrals for instance), have multiple sites per customer, separate billing addresses, and billing email addresses. You can keep notes, attach files, view a full activity log and messages sent. Each customer even has a costing and financial report, so you can see lifetime spending. Once the address is included, you get the map view of where they are based as well. You can add suppliers as well as customers, especially helpful if you're using suppliers regularly and want to check historic costs or raise purchase orders.



LAYOUT:

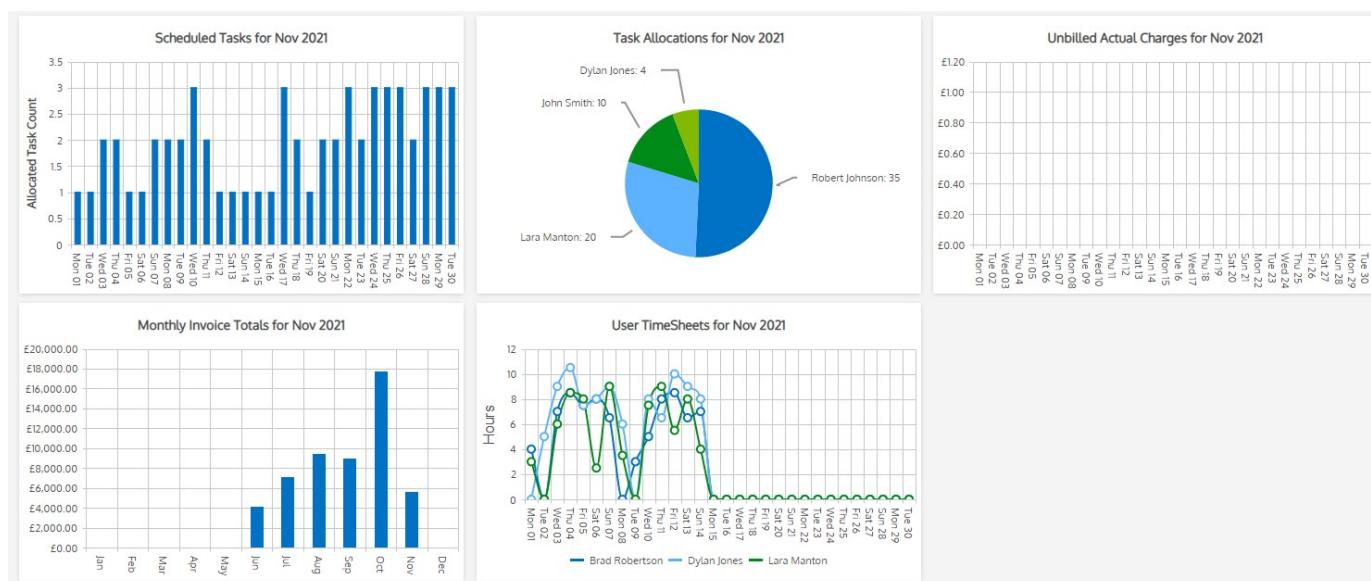
As with a lot of systems nowadays navigation is done mainly from the left-hand menu that can be expanded or minimised using the 3 lines (leaving just the icons when minimised). Any buttons or options that you click on will create a pop-up on the right-hand side of the screen, overlaying the current page, rather than taking you to a new page or tab. These also have the ability to make them full screen, as otherwise it can get confusing with the screen behind. Several of the pages can be laid out in different ways, from Grid View to List View, Calendar, or Map View. Each team member is allocated a colour & the system uses their initials to identify them which means at a glance you can see who is linked to different jobs. You can also have tags for jobs and stage labels. So, while the screen is mostly white rest of the colours on the screen have meaning. Green is used to indicate where you are currently as there are plenty of drop-down arrows across the system



The top bar of the dashboard has a variety of which options, including settings, messages (both sent and received) the support and knowledge base (which opens in a new tab if clicked), an activity log, and a quick add button. The person icon stays if minimised and this row pops out if hovered over.



The initial home page dashboard has a variety of graphs showing an overview of the state of the business. You can see scheduled tasks and whom they are assigned to, along with user times sheets, monthly totals, and unbilled charges. It's a good view to make sure that everything is running as it should, as you could identify who may not be submitting timesheets or where you've got items you need to be billing out. These are all shown monthly, defaulting to the current month.



INTEGRATIONS:

Being mainly from Australia and New Zealand, it only connects with Xero in the UK market (it also connects with MYOB), but it is a 2-way integration. This means that while it pushes sales invoices to Xero, it can also pull purchase invoices in from there, meaning there is no need for double entry of the costs, and ensuring the profitability stats are as accurate as possible. The Xero integration makes set up quicker, as it pulls in all contacts as well as a chart of accounts for sales. You can also set it up so that when invoices are paid in Xero, it feeds back into NextMinute, meaning that certain team members could work exclusively from within NextMinute. If you create a new client in NextMinute, for example as you are quoting them, this will feed back into Xero. If you are using Xero payroll, you can also integrate timesheets to reduce needing to enter that information again.

Key Benefits

Any bookkeeper that works with construction clients knows how disorganised they can be, from paper timesheets to envelopes of receipts that come with added sand. Getting them on a system isn't always the easiest thing, so having everything in one place, easy to use, and integrated is ideal. The app means that if they're on the go then they don't have the excuse of not being able to do anything until they're at their computer, and real-time information means nothing is forgotten or delayed. It should help us to have a better idea of what is going on and help clients quote based on accurate figures, invoice quicker, and get paid quicker. It should reduce admin time spent, whether that be the bookkeeper, internal administrator, or by the business owner. Everyone has access to the same information and team members can only see what they are allocated to, meaning subbies (who can be averse to new technology) only have their own tasks and timesheets to submit.

SUPPORT:

Their support is very friendly. Andrew (who is the UK lead) is always ready to jump on zoom to talk something through. Having run a building company himself, he knows what issues the clients are facing and how best to use the software to support them. They are more than happy to take some information from a previous system to build out the demo version and will work with you to understand how the client works. In-app, there are walkthroughs (although not interactive, unfortunately), support articles, & chat. The walkthrough can be started again, but it would be helpful if you could set it up as you go with the prompts still being visible. The onboarding process does also come with email prompts to let you know what they recommend setting up first & check-ins during the trial and afterward. They are also always open to recommendations and looking at features customers would like to see.

Strengths

- Xero 2-way integration, avoiding the need to duplicate data entry, covers everything from contacts to job costing
- Android and iPhone apps
- Extensive knowledge base, with videos and walkthroughs.
- Easy to navigate
- Incredibly customisable – the settings have all sorts that can be tweaked to your needs
- Ability to import everything from jobs to items, if moving from a different system
- Covers everything from costing to timesheets, so no need for multiple add-ons
- Full audit trail in the contact activity log
- Ability to archive, not delete, so that all items are saved if needed to refer back to
- Responsive support team
- Only pay for the users you need in that monthly, you can add and suspend users as required.
- Layout, tags, and colours mean it's easy to see what needs attention at a glance.

Areas to improve

There's a couple of annoying little things that I would like to see changes (some they are already working on)

- UK version still has \$ on all the screens – it is £ on invoices and reports, however.
- I would prefer that some things open in a new tab rather than overlaid on one another (especially reports)
- The reports start out small because of this and you need to zoom in several times to make them legible
- It would be good if the walkthrough allowed you to do the steps at the same time as you are going through it, rather than just being there for reference.
- Longer trial – 14 days isn't enough time to explore all the features
- It would be good to have approximate travel times on the map view to help with scheduling
- The ability to add widgets and customise the home page (homepage reports are also the only things that don't go anywhere) would be good, along with being able to run the report for the quarter, financial year, etc.
- A quarterly repeating option might be useful for some

Value for Money

There are 2 versions of users and the costs associated with them. As with most software nowadays it is based on a per user per month rolling contract basis. Admin users: this would be for bookkeepers managing it, internal management or admin staff are priced at £35 + VAT a month. Team members: ie, subbies, staff working on jobs that need limited visibility are at £10+ VAT per user per month. If you have a selection of rolling subcontractors that don't work every month, you can suspend and reactivate team members as you need, so that you are only paying for the ones working in that period.

In comparison: Jobber is \$99 a month if paid annually (or \$139 if paid monthly) for a team of up to 7, then an additional \$100 a month if you want access to the API to connect it to Xero via Zapier (QuickBooks integration is included). Tradify is £19+ VAT per user per month.

If you sign up as a bookkeeping partner with them, you can either get 10% rebate on the subscription costs (paid quarterly in arrears) or pass this on to your clients, via a special discount code. There is no additional costs for having the partner/bookkeeper as a user, but you do need to contact them to let them know that you need access.

There isn't currently a central log in, so you would need to sign in under a different email address if you have amultiple clients using it. However, they are currently in the process of building this, and expect it to be up and running next year.

The trial version is only 14 days, which means unless the client has everything ready it can feel a bit short. However, it does come preloaded with examples so they can get a good feel for the features. I would prefer a 30-day trial to be able to dip in and out and make sure all areas are covered. If a client does start to build out a demo but doesn't upgrade at the end of the trial, that information isn't deleted immediately, meaning the work is not lost if they then decide to go ahead with it.

Testimonials

NextMinute has 41 reviews on the Xero App Marketplace, earning 4.9 out of 5 stars. They can be found here: <https://apps.xero.com/uk/app/nextminute#overview>

They also have a pop up box of Google and Facebook reviews on the homepage of their website, showing they get 4.8 stars on Google and 5 stars on Facebook.

Their case studies page also includes several from accountants and bookkeepers, as well as different businesses using the software. <https://nextminute.com/case-studies>

Summary of Review

I've come across clients using 3 or 4 pieces of software, none of which are talking to one another, to do what NextMinute covers. This not only makes the client's life easier, by having everything in one place but ours easier in supporting them. Depending on your level of involvement with the client, it might be one where you help them set it up, assist when needed, but deal with most of the information when it comes through to Xero only. However, having a streamlined system, with all the information in one place is to everyone's benefit.

Disclaimer

The Institute of Certified Bookkeepers having commissioned the Cerified Bookkeeper review of NextMinute software package version 21.10.0 cannot be held responsible in any way for the actions of the company NextMinute Ltd or their software. This review is an overview of the software package. Any enquiries should be directed to support@nextminute.com