



Customer case study – Crofton Plumbing & Maintenance

Xero fixes the leak in Crofton Plumbing & Maintenance's finances

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Lee Edwards, Crofton Plumbing & Maintenance**

Self-employed Hampshire based plumber, Lee Edwards, is in his second year of trading as Crofton Plumbing and Maintenance, and found keeping up with his accounts a "real pain" until he started using Xero.

Lee was 'managing' his accounts using spreadsheets, and sending out his 2 or 3 daily invoices hand-typed in Word documents. This was time-consuming, and certainly led to a few oversights he said:

"Before using Xero, I had no easy way of knowing who owed me money and when, and no quick way either of knowing when suppliers had to be paid. I would have to physically rifle through my filing, and look up my spreadsheets all the time. Keeping tabs of my cashflow was really hard work, and I didn't always keep on top of things and get paid on time."

"Even though I am a very small business (I am not even VAT registered), I realised I needed to get a bit more sophisticated with my accounts. But the accounting software I looked at seemed too complicated for me. I had a look at Sage and Quickbooks, but they both seemed to need a good knowledge of accounts, and I am happy to admit I am no expert! This is why Xero suited me. Xero has all the accounting functions I need, but is simple to use, and easy to understand. All the information I need to know is in graphs and charts that mean something to me. I also like the fact that I can pay for Xero monthly, and I didn't have to pay out for expensive software in one hit."

Lee also admits that he's pleased he no longer has to worry about keeping his accounts information safe:

"One other thing that sold Xero to me was that the data is backed up every day, so all my accounts are safe and secure. I know I can't rely on myself to be this efficient with things like that!"

Lee has also invited his accountant to have access to Xero, which will mean that come year end, producing his accounts will be a doddle. All the information his accountant needs will be already on the system, and he shouldn't need to ask for one single piece of paper. Lee is also hoping this will mean his accountancy fees will be less!

Because Lee is such a small business his cashflow is literally his income. Knowing when he is going to be paid - and, more importantly, how much - has meant Lee knows exactly where he is with his business and personal finances. With monthly accounts from suppliers all accounted for in Xero, and customer invoices all recorded, Lee can look at the Dashboard and see which customers are due to pay in that month, and see how the money he owes suppliers will be covered.

"I am a really busy plumber, and am out all day on jobs, so the last thing I want to do when I come home is spend a long time at the computer typing up invoices, then stuffing envelopes, and ticking off items on my bank statements. But this is exactly what I was doing before Xero - as I needed to make sure I was going to get paid!"

Now I just quickly set up my invoices on Xero, and email them straight out to customers. I import my bank statements online, and then Xero helps me match the transactions up really quickly, as its clever enough to think for me! Now I am up to date with my accounts in just a few minutes each day."

Lee is delighted that using Xero means he spends hardly any time sorting out his accounts these days - and he is always on top of them. He now spends the extra free time he has at home with his family.

Crofton Plumbing and Maintenance is the company name of sole trader plumber Lee Edwards. Lee supplies plumbing and related services to domestic customers in and around Crofton in Hampshire.