

01 • EXECUTIVE SUMMARY

Find what the old system was losing, then set ServiceM8 up so it can't happen again

The brief. Move scheduling, quoting and job records into ServiceM8 from 12 October 2026, keep Xero as the books, and stop work slipping between the job sheet, the paper register and the invoices.

What 12 months of history showed. 141 completed jobs have no Xero invoice (\$106,146.30 ex GST at the business's own rates). 126 after-hours jobs were billed at the standard rate (\$29,218.50 short). 19 jobs were invoiced twice (\$15,598.89 to credit). Net, \$119,765.91 ex GST was under-billed. 64 pricebook items fall below their margin floor at the 2026 supplier costs, and 35 backflow devices at 21 sites are past their annual test.

The set-up. 11,230 client records across three sources become 1768 clients. 25 job templates with forms and licence rules come from the job history. 293 clean materials load with their Xero accounts. Every backflow site gets one recurring job, and 274 open jobs load at go-live.

5/10

go-live gates pass

1768

clients from 11,230 records

132

recurring backflow jobs

12/12

engine tests pass

Before ServiceM8 goes live

- Owner reviews the 286 billing findings and decides what to invoice or credit (gate G7).
- Owner approves new prices for the 64 low-margin items (G4).
- Bookkeeper merges the 64 duplicate Xero contacts before ServiceM8 is connected (G2).