

WORK SAMPLE · FIELD-SERVICE SET-UP

ServiceM8 for a plumbing and gas business set up from 12 months of its own history

A six-person Melbourne plumbing business runs on a spreadsheet job sheet, invoices typed into Xero and a paper backflow register. Before moving it to ServiceM8, 9,200 jobs, 7,909 invoices and 215 testable devices are matched up: one client list, job templates built from real work, a pricebook checked against 2026 supplier costs, recurring backflow tests, and a billing check of the last 12 months. A work sample: the data is realistic and every figure is computed from the files.

141

done jobs never invoiced

\$119,766

net under-billed over 12 months (ex GST)

35

backflow devices overdue at go-live

32/32

controls pass

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).

Seven files in, four ServiceM8 imports and a billing check out

Inputs

FILE	SIZE
Xero contacts export	1,815 contacts
Xero invoices export	7,909 invoices, Oct 2025 to Sep 2026
Job sheet (Google Sheets)	9,200 jobs
Backflow register (typed from paper)	215 devices
Current price list	324 rows
Supplier price file 2026	302 lines
Staff list	13 staff and their licences

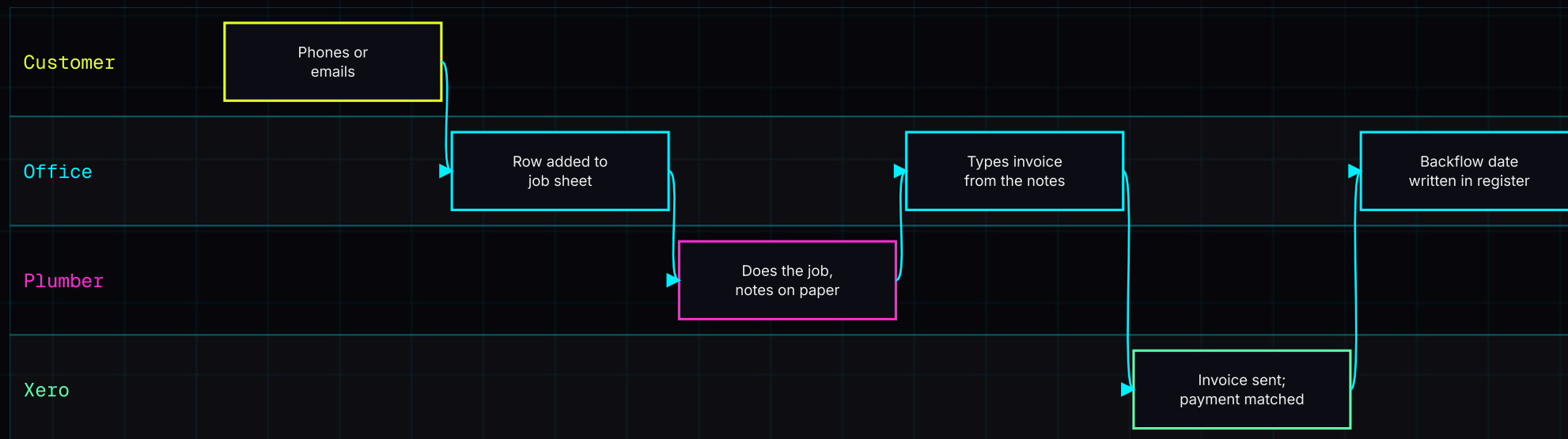
History stays where it is: the job sheet and Xero keep the last 12 months. ServiceM8 starts with clients, materials, recurring backflow work and open jobs.

Approach

1. Match every client record across Xero, the job sheet and the register to one customer.
2. Put every job in a category with keyword rules; leave unclear wording for the office.
3. Check each done job against its Xero invoice using the business's own rates.
4. Re-cost the price list from the 2026 supplier file and test each item against a margin floor.
5. Work out the next backflow test per device from the register and the job sheet.
6. Build templates, forms, statuses and the import files.
7. Gate go-live behind 10 gates, 32 controls and 12 tests.

03 · CURRENT STATE

Three records of the same work, joined by hand



Job sheet

One row per job, typed by the office. The billing name is written however the caller said it, so one customer appears many ways.

Invoices

Typed into Xero from the plumber's notes. 17% carry no job number, so nothing links an invoice back to its job.

Backflow register

Paper, copied into a sheet. 84 device dates were never written back after a test, so the register says tests are due that were already done.

Ten findings, each measured from the files

FINDING	COUNT	VALUE (EX GST)	ACTION
Done jobs with no invoice	141	\$106,146.30	Owner decides what to bill
After-hours jobs billed at the standard rate	126	\$29,218.50	Owner decides; after-hours items in ServiceM8
Jobs invoiced twice	19	(\$15,598.89)	Credit the second invoice
Duplicate Xero contacts	64		- Merge before connecting
Items below margin floor at 2026 cost	64		- Owner approves new prices
Items discontinued by the supplier	19		- Pick a replacement
Duplicate price-list rows	16		- Removed from the import
Backflow devices overdue	35		- Booked over the first two weeks (21 sites)
Register dates out of date	84		- Taken from the job sheet
Jobs whose wording fits no category	289		- Office review (history only)

Expected amounts use the business's own rates: labour \$145 an hour (\$220 after hours), call-out \$99 (\$180), \$165 per backflow device, plus materials. On every job marked OK the invoice equals that amount to the cent, so the rule is the one the office already uses.

Why ServiceM8 for this business

OPTION	PLUMBING FIT (30%)	XERO LINK (25%)	COST, EFFORT (20%)	USE ON SITE (25%)	WEIGHTED /100
A. Keep the job sheet, add checks	2	2	5	2	52
B. ServiceM8, set up from the history (recommended)	5	5	4	5	96
C. Jobber	4	4	3	4	76

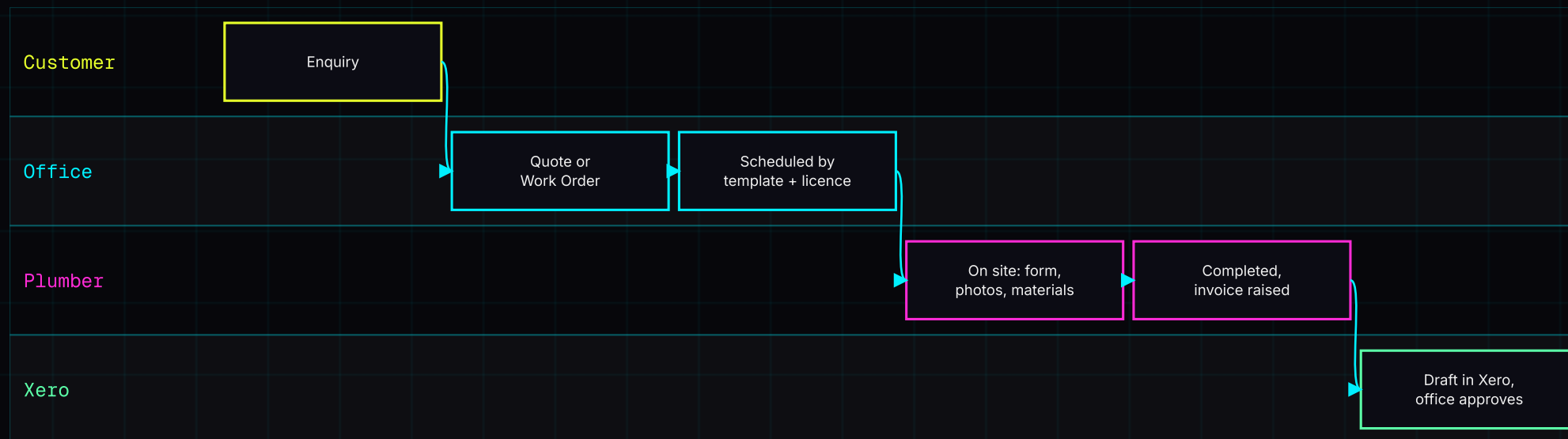
Why B

Jobs, forms, photos and recurring work in one app on the plumber's phone, and invoices that reach Xero from the completed job. The office stops re-typing, so jobs can't go unbilled without someone seeing it.

Why not just add checks

A monthly billing check would catch the misses after the fact. It would not stop the after-hours rate being missed, and the register would still be paper.

One job record from enquiry to Xero



Statuses

Quote, Work Order, Completed, Unsuccessful. The job sheet's seven statuses map onto these (Statuses tab).

After hours

Start before 7am, from 6pm, or a weekend: the after-hours labour and call-out items go on the job, so the rate can't be missed on the invoice.

To Xero

Invoices go to Xero as drafts with the job number in the reference. Payments are reconciled in Xero as now. GST coding doesn't change.

11,230 client records become 1768 clients

RULE	RESULT
Same email	Same customer
Same phone	Same customer
Same name and address	Same customer
Same business name (Pty Ltd, case, spacing ignored)	Same customer
Initial + surname + same address	Same customer
Same name, different address and phone	Kept apart

Rules join records into groups (a record joined by two rules joins both groups). Tested against the answer key: 0 false merges, 0 customers split.

1815

Xero contacts

64

duplicate Xero contacts

596

agency and builder job sites

1768

clients imported

Property managers and builders are one client each, with their properties as job addresses. Each client keeps its Xero contact ID so invoices land on the existing contact.

25 templates, sized from the job history

TEMPLATE	JOB	PER MONTH	MEDIAN HRS	AFTER HOURS	AVG INVOICE	FORM	LICENCE
Backflow: annual test	111	9.3	0.9	0%	\$267	Backflow test report	Backflow accredited
Gas leak: make safe	117	9.8	2	14%	\$535	Gas compliance checklist	Gas fitting
Gas appliance: install or connect	260	21.7	2	16%	\$548	Gas compliance checklist	Gas fitting
Gas compliance check	129	10.8	1.75	12%	\$529	Gas compliance checklist	Gas fitting
Gas heater: service or repair	242	20.2	2	18%	\$550	Gas compliance checklist	Gas fitting
Hot water: replace unit	195	16.3	2.5	20%	\$1,600	Hot water install checklist	Licensed plumber
Hot water: valves and tempering	369	30.8	2.75	21%	\$1,577	Hot water install checklist	Licensed plumber
Hot water: fault-find and repair	734	61.2	2.5	19%	\$1,588	Hot water install checklist	Licensed plumber
Burst or leaking pipe: find and repair	855	71.3	2.75	31%	\$692	Water damage photos and notes	Any
Renovation: rough-in	78	6.5	5.5	3%	\$1,499	Pre-start safety (SWMS)	Licensed plumber
Renovation: fit-off	96	8	5.5	3%	\$1,457	Pre-start safety (SWMS)	Licensed plumber
Fixture or appliance: connect	323	26.9	5.5	5%	\$1,524	Pre-start safety (SWMS)	Licensed plumber
Gutter and downpipe	329	27.4	2	18%	\$522	Working at heights pre-start	Any
Stormwater pit: clear	123	10.3	2	15%	\$512	Working at heights pre-start	Any
Roof or box gutter leak	123	10.3	2	23%	\$533	Working at heights pre-start	Any
Blocked drain: jet and clear	583	48.6	1.75	21%	\$423	Drain clear report	Any
Blocked drain or toilet: clear	1,185	98.8	1.75	20%	\$427	Drain clear report	Any
Tenant leak: attend	170	14.2	1.75	8%	\$494	Tenant attendance report	Any
Property manager work order	675	56.3	1.75	10%	\$491	Tenant attendance report	Any
Toilet suite: replace	253	21.1	1.5	6%	\$580	Job completion checklist	Any
Toilet and cistern: repair	574	47.8	1.5	7%	\$577	Job completion checklist	Any
Shower mixer: repair	283	23.6	1.25	7%	\$562	Job completion checklist	Any
Tap and washer: repair	735	61.3	1.25	7%	\$583	Job completion checklist	Any
Quote visit	173	14.4	0	0%	\$0	Site inspection notes	Any
CCTV or pre-purchase inspection	196	16.3	0	0%	\$0	Site inspection notes	Any

Keyword rules put 8,911 of 9,200 jobs in a category with no wrong ones against the answer key. 289 jobs with wording like "call customer back" are left for the office. Templates carry the form, and the licence rule stops a job being booked to someone who can't do it.

64 items below their margin floor at 2026 supplier costs

CODE	ITEM (13 OF 64)	NEW COST	SELL	MARGIN	FLOOR	PROPOSED
SA-1013	Element 3.6kW	1,755.89	2,030.21	14%	17%	2,195.00
SA-1091	Dual flush button - chrome	600.64	679.01	12%	17%	751.00
SA-1150	Gully riser 150mm	246.60	315.91	22%	24%	345.00
SA-1261	Testable backflow device 20mm	402.54	519.84	23%	24%	563.50
SA-1201	Brass nipple 15mm	167.53	189.25	11%	24%	234.50
SA-1004	Continuous flow gas HWS 26L	2,230.10	2,674.26	17%	17%	2,787.50
SA-1173	Saddle 100mm	150.26	164.59	9%	24%	210.50
SA-1263	Testable backflow device 32mm	873.64	919.72	5%	17%	1,092.00
SA-1025	Hot water unit 315L electric - premium	3,139.78	3,234.24	3%	17%	3,924.50
SA-1006	Heat pump HWS 270L	1,402.63	1,682.29	17%	17%	1,753.50
SA-1186	Ball valve 20mm	181.65	215.30	16%	24%	254.50
SA-1206	Copper bend 20mm	155.80	202.50	23%	24%	218.00
SA-1286	Pipe lagging 2m (pack 10)	170.42	223.04	24%	24%	238.50

Rules (Rates tab)

- Margin = (sell - new cost) / sell, against a floor by cost tier: under \$20, 42%; under \$100, 32%; under \$500, 24%; above, 17%.
- Proposed price = new cost plus the tier markup, rounded to 50 cents. The owner approves each one (gate G4).
- 19 discontinued items and 16 duplicate rows are left out of the import.
- 293 lines import, each with its Xero account (210 materials, 200 labour and fees).

215 devices at 132 sites, one recurring job each

35

devices overdue at 12 Oct

14

due by December

166

due in 2027

84

register dates corrected

- Last test = the later of the register date and the last backflow job on the job sheet. Next due is 12 months later.
- Overdue sites are booked over the first two weeks after go-live; the rest start on their due date and repeat every 12 months.
- Recurring jobs go only to the accredited testers, with the device count on the job so the fee and time are right.
- The Backflow test report form records each device's readings and the tester's accreditation number, ready to send to the water corporation in the format it asks for.

\$119,765.91 net under-billed in 12 months

CATEGORY	NET GAP (EX GST)
Hot water	33,304.61
Leaking taps and toilets	20,614.90
Blocked drains	18,689.22
Burst and leaking pipes	15,223.93
Roof and stormwater	8,045.87
Bathroom and kitchen	8,043.73
Maintenance (property manager)	6,428.50
Gas fitting	4,733.90
Review	4,351.25
Backflow testing	330.00
Total	119,765.91

How each job is checked

1. Invoice by job number in the reference; if none, same client within 14 days with the same hours and materials.
2. No match: not invoiced. Labour at the standard rate on an after-hours job: short.
3. A second invoice with the same reference, or a copy of an earlier one: invoiced twice.

Every invoice is matched once (0 unexplained). These are findings for the owner, not adjustments: the owner decides what to invoice or credit, and any change to past invoices is handed to your BAS agent or accountant.

5 of 10 gates pass; the rest wait on decisions, not data

GATE	RULE	OWNER	OPEN	PHASE	STEP	OWNER	WHEN
G1	Client list: no customer split across two clients and no Xero contact on two clients	Bookkeeper	0	PASS	Before	Merge Xero duplicate contacts (Xero Duplicates tab)	Bookkeeper 6 Oct
G2	Xero duplicate contacts merged before connecting	Bookkeeper	64	BLOCKED	Before	Owner prices the items on Margin Review	Owner 7 Oct
G3	Materials import: no duplicate or discontinued line	Owner	0	PASS	Set-up	Create staff, job categories, badges, forms and templates	Office 7 Oct
G4	Items below the margin floor priced by the owner	Owner	64	BLOCKED	Set-up	Connect Xero; set invoice, item and payment settings (Xero Sync tab)	Bookkeeper 8 Oct
G5	Every backflow site has a recurring job with the right device count	Office	0	PASS	Import	Import clients and job addresses, then materials	Office 8 Oct
G6	Recurring backflow jobs only assigned to accredited testers	Office	0	PASS	Import	Import recurring backflow jobs and open jobs	Office 9 Oct
G7	Billing findings reviewed by the owner (not invoiced, after-hours, invoiced twice)	Owner	286	BLOCKED	Test	Run one test job end to end and void the draft invoice in Xero	Office 9 Oct
G8	Every template has a form	Office	0	PASS	Go-live	Book from ServiceM8 from 12 Oct; stop new rows on the job sheet	Owner 12 Oct
G9	Open jobs: client exists and a category is picked (no job left on Review)	Office	7	BLOCKED	After	Week 1 check: every completed job has a draft invoice in Xero	Bookkeeper 19 Oct
G10	Test job run end to end (quote, work order, completed, invoice in Xero as a draft)	Office	1	BLOCKED			

13 · CONTROLS

32 of 32 controls pass

CONTROL	ACTUAL	CONTROL	ACTUAL
Every client record maps to a client that exists	11,230 PASS	Every coded item is in the supplier file	318 PASS
Client records counted on the Clients tab	11,230 PASS	Materials import has no duplicate code	287 PASS
Every job's client exists	9,200 PASS	Materials import lines all in the pricebook	293 PASS
Every backflow device's client exists	215 PASS	Materials import = kept pricebook rows + 4 labour and call-out items	293 PASS
Job sites counted on the Clients tab	596 PASS	Margin review rows = items below floor	64 PASS
Every job has a category or is marked for review	9,200 PASS	Proposed prices meet the floor	64 PASS
Category rule counts = jobs	9,200 PASS	Backflow: devices on recurring jobs = register	215 PASS
Templates cover every categorised job	8,911 PASS	Recurring job device counts match the register	132 PASS
Every done job is on the Billing Check	8,031 PASS	Recurring jobs assigned to accredited testers	132 PASS
Every invoice is on the Billing Check once	7,909 PASS	Overdue devices booked within two weeks of go-live	35 PASS
OK jobs: invoice = expected amount	0 PASS	Every template has a form	25 PASS
Invoiced on Billing Check = Xero invoice total	5,892,505.33 PASS	Every template has staff who hold its licence	25 PASS
Gap (formula) = engine gap	119,765.91 PASS	Open jobs: client exists	274 PASS
Not invoiced rows have no invoice	0 PASS	Status map covers every job-sheet status	9,200 PASS
After-hours flags only on after-hours jobs	0 PASS	Exceptions: one per billing finding	286 PASS
Pricebook status (formula) = engine status	324 PASS	Engine regression: false client merges	0 PASS

12 of 12 tests pass

TEST	METHOD	TESTED	EXPECTED	ACTUAL	
Client records matched to the right customer	Email, phone, name and address, business-name rules; compared with truth/clients.csv	11,230	0	0	PASS
Customers found	Clients after matching vs true customers	1,768	1768	1,768	PASS
Jobs put in the wrong category	Keyword rules vs truth/jobs.csv (review jobs not counted)	9,200	0	0	PASS
Not-invoiced jobs found	Seeded jobs with no invoice	141	141	141	PASS
Jobs flagged not invoiced that were	Same run	9,200	0	0	PASS
After-hours jobs billed at standard found	Seeded jobs	126	126	126	PASS
After-hours flags that are wrong	Same run	9,200	0	0	PASS
Jobs invoiced twice found	Same reference, or a copied invoice with no reference	19	19	19	PASS
Duplicate price-list rows found	Same supplier code; keeps the row named like the supplier file	16	16	16	PASS
Price-list rows with the right keep/remove decision	Same run	324	324	324	PASS
Discontinued items found	Supplier file status	19	19	19	PASS
Invoices left unexplained	Every Xero invoice matched to a job or flagged as a second invoice	7,909	0	0	PASS

The answer key comes from the data generator: the true customer behind each record, each job's category, and the jobs that really were missed, under-billed or invoiced twice.

What could go wrong, and how the set-up stops it

RISK	LIKELIHOOD	HOW IT IS HANDLED	WHEN	CHECK
A job is done but not completed in the app	Med	Week-1 check: every completed job has a draft invoice; open Work Orders older than 7 days reviewed	Week 1	Every completed job has a draft invoice in Xero
Plumbers skip the form	Med	Form required on the template before the job can be completed	Week 2	Overdue backflow sites all booked or tested
Invoice sent from both systems	Low	Job sheet frozen at go-live; Xero invoices only from ServiceM8 drafts	Week 4	Billing check re-run on October: no misses, no after-hours shortfalls
Wrong client picked on a call	Low	One client per customer; agency sites as job addresses	Quarter end	December-quarter figures from Xero handed to your BAS agent or accountant
Backflow test missed	Low	Recurring job per site; overdue list booked first		

16 · HOW THIS APPLIES TO YOUR BUSINESS, AND THE FILES

Using this on your own move to ServiceM8

The same steps work for most trades moving off spreadsheets, whiteboards or paper:

- Your own rates and categories go in; the billing check and matching rules stay the same.
- Import column names are mapped to the current ServiceM8 import template at go-live.
- Licensing and compliance forms are set to what your trade and water corporation require.

This is a work sample with realistic data. It shows the method and the output; every figure comes from the sample files.

Files in the download

FILE	WHAT IT IS
ServiceM8-Plumbing-Setup.xlsx	28 tabs, 68,568 formulas, 32 controls, 12 tests
ServiceM8-SOPs.pdf / .docx	Three office and field SOPs
results/servicem8_import/*.csv	Clients, materials, recurring backflow jobs, open jobs
engine.py	Client matching, categories, billing check, pricebook, backflow schedule, imports, tests
gen.py	Builds the sample data set
book.py / metrics.py / report.py	Build the workbook, the figures and this report
data/*.csv	Inputs as exported