Partner toolkit
Construction in Xero

Learn how you can manage construction clients more efficiently with Xero.
## Contents

- Xero for construction ................................................................. 3
- Understand your clients’ goals ............................................. 4
- Help clients achieve their goals with Xero ....................... 5
- What is Xero Business Edition? .............................................. 6
- Xero Business Edition: features ........................................... 7
- Xero Business Edition: pricing and points ....................... 8
- Xero Construction Industry Scheme add-on ......................... 9
- Xero Expenses ........................................................................ 10
- Xero Payroll ........................................................................... 11
- Xero Projects ....................................................................... 12
- WorkflowMax ....................................................................... 13
- Hubdoc and Xero ................................................................. 14
- Become a Xero construction champion ......................... 15
- What to send to your clients .............................................. 16
- What to send existing Xero clients .................................. 17
Xero for construction

Handle construction clients more efficiently with Xero

Xero makes managing construction clients at scale easy and reduces admin time needed by your firm.

Our range of tools can help you manage invoicing, accounts, CIS, expenses and payroll, and track the profitability for your clients’ each and every job.

Our useful mobile apps make it easy to get timely information from clients and their employees, as well as reducing the amount of client data input errors. All key calculations are automated so you can be confident you’re getting the numbers right.

And when it comes to compliance you can run reports and file submissions in a few clicks. It all helps reduce the time and costs involved with construction clients.

“ I love using Xero because I’m always out on site and being able to look at the accounts without going back to the office is brilliant.”

Amy Perry – Cropston Contracts

A small business that was recommended Xero by their accountant, Whiting and Partners
Understand your clients’ goals

The first step in recommending the right apps to clients in the trade and construction industry is to learn more about their business. Understand each of your client’s respective goals by building a business profile using the points below:

1. **Goal**
   What is the business trying to achieve over the short- and long-term? Does your client want to increase efficiency, grow their business, or both?

2. **Pain points**
   Is your client looking to address specific problems within their business?

3. **Financial health**
   Assess the current financial health of the business, if you don’t already know.

4. **Number of employees**
   How many employees does your client have? Are they looking to grow employee numbers or stay the same?

5. **Job type**
   Do they undertake mainly smaller, high-frequency jobs? Or larger, project-based jobs that take longer to complete?

6. **Current tools**
   Which version of Xero does your client use? What apps, if any, are they using in their business today?

7. **Technology proficiency**
   How experienced is your client and their team in using apps and other software?

Once you’ve built a business profile for your client, you can work out their job type and goals.

**Job-based**
- Their main business focus is on high-volume work
- Success is defined by managing several jobs at the same time
- Often tradespeople operating while they’re out and about between jobs – until they get home to do the admin

**Project-based**
- Fewer customers, but the scale and complexity of each job is larger
- Success means delivering a project efficiently and profitably
- Often have complex payment structures, such as progress payments and subcontractor payments
Help clients achieve their goals with Xero
Using Xero and our integrated add-on apps gives you all the tools you need to manage your construction clients efficiently and effectively.

**Xero Business Edition**
Help clients get paid faster and manage their accounts and compliance duties in less time
Find out more

**Xero Expenses**
Reduce the time and cost of managing expenses
Find out more

**Xero Payroll**
Make payroll more profitable for your firm
Find out more

**Xero Projects**
The simple way to track time, costs and profitability of client jobs
Find out more

**Workflow Max**
Powerful project management for clients with complex needs
Find out more

**Hubdoc**
Spend more time making sense of your client data and less time collecting it
Find out more

For more functionality, check out our guide to useful apps in our marketplace that connect with Xero, creating the perfect solution for you and your clients.
What is Xero Business Edition?
Xero Business Edition brings all the accounting information you need together in one easy-to-navigate space. Beautiful, powerful apps for your mobile, tablet or computer help you and your clients work more efficiently and put you in charge of your clients’ accounts and your own workflow.

Get paid faster
Being able to create invoices anywhere, at any time, helps your clients get paid faster. They can check for outstanding payments at a glance and automate reminders to get paid on time.

Save time
Everyone can input data into the same place. So you, your clients, and their employees don’t have to waste time collating multiple spreadsheets or pieces of paper. And there’s less data entry into your accounting system.

Control spending
Reduce admin, help clients pay bills on time and get an overview of where your clients are spending money.

Automate VAT & CIS calculations
Manually calculating VAT and CIS deductions can be time consuming, and it’s easy to make costly mistakes. With Xero you can automate your clients’ calculations and deductions as well as submit VAT directly from Xero.

Run your business on the go
With our mobile apps you, your clients and their employees can submit and manage invoices, quotes and payments as soon as any job is done.
Xero Business Edition
Features that reduce the burden of managing construction clients

**Business edition features**

**Automatic CIS deductions**
Automatically calculate deductions before sending invoices or sending payments.

**CIS reports and statements**
Create subcontractor payment and deduction statements as well as CIS suffered reports. View monthly return information within Xero.

**Enter contractor and subcontractor details**
Importing all of your contractor and subcontractor contacts into Xero is easy, so there’s no need to waste time with data entry. And marking them for CIS only takes a tick – literally.

**Easy invoicing**
Clients can create professional, recurring invoices and receive updates when they’re opened.

**Invoice payment reminders**
Xero can send automated invoice reminders on your behalf to help you and your clients get paid on time.

**Take payment online**
Help clients get paid sooner by accepting payments from online payment services like PayPal and Stripe.

**Direct bank feeds**
Connect to your bank so transactions flow automatically into Xero each business day.

**Faster bank reconciliation**
Xero speeds up bank rec with transaction matching and coding suggestions.

**Quotes**
Clients can create and send personalised online quotes from anywhere at any time from a mobile, tablet or computer. When it comes to billing a customer, simply create an invoice from the quote.

**Xero Mobile App**
You and your clients can work together more efficiently with the Xero mobile app available on iOS and Android.

**Pay bills**
Clearly see when bills are due and pay one-off or repeating bills.

**Reporting**
Tailor smart financial reports and budgets for your clients to help them understand and track what matters most.

**Find and recode**
Find and fix errors in your clients’ accounts.

Clients can create and send invoices, & quotes anywhere at anytime from a mobile, tablet or computer.
## Pricing and partner programme points

**Business Edition**

Partners gain three points for every invited-in, paid Business Edition org that uses construction and two points for every partner-billed, paid Business Edition org.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Starter</th>
<th>Standard</th>
<th>Premium</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price per month</td>
<td>£10</td>
<td>£22</td>
<td>£27.50</td>
</tr>
<tr>
<td>Users</td>
<td>Unlimited</td>
<td>Unlimited</td>
<td>Unlimited</td>
</tr>
<tr>
<td>Reconcile bank transactions</td>
<td>£20</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Submit VAT returns</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Secure, automatic bank feeds</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Create quotes and invoices</td>
<td>5</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Track bills</td>
<td>5</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Create purchase orders</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Multi-currency accounting</td>
<td>-</td>
<td>-</td>
<td>✔️</td>
</tr>
<tr>
<td>Counts towards partner status</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
</tbody>
</table>
Coming soon: Xero Construction Industry Scheme add-on

Spend less time managing CIS compliance tasks for your clients with these features – coming soon.

Features coming soon

CIS e-filing
Submit monthly CIS returns directly from Xero.

Bulk payment and deduction statements
Save time managing CIS with the ability to send out bulk payment and deduction statements.

Verify subcontractors online
Use Xero to verify your subcontractors directly with HMRC.
Deliver better expense management support for your clients. With Xero Expenses, submission and approval is easy, insights are deeper, and accounting is integrated – so you can reduce the time and cost of processing expense claims and spend more time advising your clients.

**Automate expenses capture**
Let clients take shots of their expenses on their mobile and Xero will automatically pull out the right information to create a claim. All the client needs to do is review and submit.

**Eliminate hidden time costs and expenses**
Streamline the expenses process – get push notifications on your phone to keep up-to-date on the status of a claim and avoid missed calls and unread emails.

**Offer leading insights on expenses**
The Expenses Explorer feature gives you valuable insights into spending in Xero. Help your clients make informed decisions about spending and policy, and see expense patterns by category, accounts and employees.

**Stay in control**
Help your clients get more control over their expense claims. Set company and user-level permissions, control expense and tracking categories, and submit expenses on behalf of your clients.

Pricing starts from just £2.50 per month. Find out more about Xero Expenses for partners.
Xero Payroll
Make payroll more profitable for your firm

Xero shaves hours off the time it takes to manage payroll, pensions and accounts for construction clients. Get more accurate submissions from employees, reduce your admin workload, and process pay runs and pensions in a few clicks.

**Save time on admin**
Xero Payroll seamlessly integrates into your accounts, meaning no more journal entries and saving you time and reducing errors. And with our market-leading portal and mobile app, employees can submit timesheets and leave requests from any PC or mobile at any time.

**Stay in control**
Review and approve requests, and send and view payslips from any computer or mobile device. Review and send pay and pensions contributions in just a few clicks.

**Reduce your overheads**
Payroll is integrated directly into Xero – there’s no extra software to download, integrate or maintain. Save time and money by sending online or mobile payslips, and with the time saved it’s easier for you to scale your practice using your existing employees.

**Manage compliance and pension tasks with ease**
We make it easy for you to submit the right information to HMRC and comply with any mandatory workplace pension duties. We also create the right P11/P32/P60 forms for you.

Pricing starts from just £5 per month for the first five employees on Payroll. Find out more about how Xero Payroll works for you and your clients.
Xero Projects
Easy job management for clients with simple needs

Xero Projects is the simplest way to keep the time and profitability of projects on track – from any device. It’s perfect for any client with simple time and cost-tracking needs.

- **Track projects in real-time**: Track time, costs and expenses for any project, from any device. Add task estimates and budgets with ease. Monitor performance with live tracking and key insights.

- **Create invoices in less time**: You or your clients can create fixed price, progress payment, or time and materials invoices based on actual project information, saving time and avoiding errors.

- **Help clients increase profitability**: Know which jobs are delivering the best ROI and which need to be reined in. Help clients charge what they’re worth based on the time, cost and profitability of previous projects.

- **Stay in control**: With multiple user permission settings, you and your clients can control staff access. And it’s all in Xero, so it automatically integrates with client accounts.

Pricing for Xero Projects starts from just £5 per month. Find out more about how Xero Projects can work for you and your clients.
WorkflowMax
Powerful project management for clients with complex needs

WorkflowMax – owned by Xero – is a highly customisable, end-to-end project management solution for businesses that need to manage their workflow from quote to invoice while tracking time and costs.

Reduce admin to save time and money
With intelligent job management, clients can easily schedule resources and see how jobs are progressing against quotes. Timesheets save clients time and provide accountability, so job profitability can be improved.

Acquire and retain more clients
Integrated lead management helps clients keep tabs on leads, proposals and the sales pipeline – all in one place. And once they’ve won new business, easy quoting and client management helps them keep it.

Stay on top of your business
Understand the profitability of each job and see when clients need to raise rates. Manage outgoings and track job orders against job costing. Store, manage and share documents through world-class, third-party apps.

Get paid faster than ever
Your clients can send invoices online with a couple of clicks and using just a few basic job details. WorkflowMax integrates with Xero, so you can set up custom invoice reminders and payments for approval.

Pricing for WorkflowMax starts from just £15 per month
Find out more about WorkflowMax.
**Hubdoc + Xero**

Spend more time making sense of your clients’ financial data and less time collecting it

Integrating Hubdoc and Xero means time-consuming bookkeeping tasks are automated, saving partners up to 30% of their time.

With automated bookkeeping, real-time financial data and an audit-proofed set of books, Hubdoc seamlessly syncs with Xero so you and your clients can make informed business decisions.

---

**Stop chasing bills and statements**

Hubdoc auto-fetches financial documents from over 700 banks, utilities, telecom providers and online vendors. It extracts the key financial data and seamlessly syncs with Xero. It also gives your clients the tools to upload receipts, bills and invoices from their mobile device or desktop. No more paper, no more chasing.

**Focus on the data, not the data entry**

Hubdoc extracts the key data from your receipts and bills and creates entries in Xero with the source documents attached. And with real-time financial data Xero can automatically match data imported from Hubdoc with bank feed transactions so the books are always up to date.

**Automate bank reconciliation**

Hubdoc transactions are automatically matched with bank feed transactions in Xero. All you have to do is approve the match. Closing the books has never been so easy.

**Audit-proofed books**

Hubdoc provides you and your clients with complete confidence that their financial documents are organised, secure and always available. All data is verified with the source document, and easily searchable on any device.

To get started and save up to five hours per month, per client, find out more about how Hubdoc and Xero work together.
Become a Xero construction champion

1. Payroll in Xero
2. Manage expenses
3. Get certified on Xero
4. How to manage CIS in Xero
5. Manage client projects
6. Implementing Xero step-by-step
**What to send your clients**

Let your clients know about the availability of Xero Business edition with this email template. Just copy and paste the contents, adding in details like the client’s name and your sign-off.

---

**New Message**

Subject line: **Reduce the time and stress of running your construction business**

[Insert your greeting],

We appreciate that running a business is hard, especially in the construction industry. There is so much to think about – from quoting and managing jobs, buying materials, managing contractors and subcontractors, to thinking about tax obligations. It can sometimes be hard to get back to the reason why you got into business in the first place.

Getting you and your employees using Xero Business Edition could help reduce the time and stress of managing your business.

Here’s how it can help:

**Get paid faster**
Create invoices at any time, from anywhere, and let your customers pay instantly. Check for outstanding payments at a glance and automate reminders to get paid on time.

**Save time**
You, your employees and your accountant can all input data into the same place, so there’s less time wasted collating multiple spreadsheets or pieces of paper, and less time spent on data entry.

**Control your spending**
Reduce admin, manage your expenses more efficiently, pay your bills on time and get an overview of where you’re spending money.

**See the time, costs and profitability of your jobs in real-time**
Track time, costs and expenses against your jobs. Manage employees’ time while out completing jobs.

**Reduce your paperwork**
Let Xero automate your VAT, payroll and CIS calculations and deductions, and send payroll and VAT submissions directly from Xero. No more manual calculations.

**Run your business on the go**
With our mobile apps, you and your employees can submit and manage invoices, payments, expenses, time and leave from anywhere.

**Easy to use**
Employees will love using the Xero Me mobile app to view their payslips or submit requests.

Get in touch if you want to try this out because we really think that this could improve how we manage your construction and accounts.

[Add your sign-off here]
What to send existing Xero clients

If you already have clients on Xero Business Edition then our expenses, project management or payroll software could still help reduce your admin burden and make their lives easier.

Take a look at our web pages and toolkits to get more information on how these apps could help you and your clients. You’ll also find email templates to use with your clients.