

Job Management System

In the early stages of a small business, the owner needs to do it all; win the work, do the work and invoice the work. Understandably this leads to long nights spent doing quotes, invoices and account reconciliation let alone spending time on job planning, labour utilisation and job profitability to understand if you're actually making money. An important evolutionary stage for any small business owner is the point when they stop doing everything and focus their time on the right things, leveraging systems for the other tasks. Navigating this journey is tough and it's often one of the top reasons people choose a business coach and so we regularly help clients decide which systems suit them.

For trade and service-based businesses, job management systems can be one of the most useful tools of their business. At their core, these systems help business owners prepare and track quotes, schedule and manage jobs, schedule and manage staff, make invoicing easier and run reports to make informed business decisions.

So which job management system is best for your business?

As with all systems and technology, be it a CRM, accounting package, inventory management or job management system there are many options available, all with differing levels of features, pricing and integration complexity. Some questions you should consider when deciding on which job management system is best for your business are;

How easy is it to integrate with my current systems?

What changes are required to the way we currently do things?

What amount of training is required to learn how to use the new system effectively?

What will I actually use and need in real-world scenarios?

Is the solution that's right for my business now going to suit my needs and budget in the future?

And is all of that worth the cost of my time and money?

Thanks to our 16 years of coaching owner-operated businesses, we have experience across a wide range of software systems and can help navigate the choice.

Before any opinions or advice, it's important to note that we're **not** incentivised by any of the software companies; our advice is based purely on what's best for our clients. (Where the software provider has a built-in remuneration program, we pass it straight on to our client so only they benefit.)

There are dozens of job management systems on the market. We have narrowed our review down to the 4 most relevant to our client base of trades businesses; AroFlo, simPRO, ServiceM8 and Tradify.

It isn't that one particular system is right or wrong, it's about matching what the system can do with what you need and weighing up the value vs your budget.

Simple and Complex Systems

Generally speaking, the systems fall into 2 broad categories: simple and complex.

Simple systems meet the basic needs of trade businesses: straightforward quoting, scheduling and invoicing. They solve common job management problems in "do and charge" businesses in the simplest manner possible.

Typical job: Replace a hot water system or install an air-conditioning system. A quote includes product, materials, and a labour install rate. The job is done in a matter of hours and can be instantly invoiced.

Complex systems are designed to handle the needs of more complex businesses with sophisticated workflows. These systems provide functionality for multifaceted job costing, scheduling and dispatching, time and materials tracking, billing, payment processing and customised reporting.

Typical job: multi-stage job with long project times and constantly changing schedules or large teams of trades with annual preventative maintenance contracts.

Which job management system is best for your business?

To help with this decision, this table compares the capabilities of the “simple” and “complex” products.

Function	Simple Systems		Complex Systems	
				
Mobile / App	✓ Apple, Android, Web	✓ Apple, Web	! Mobile web version only	✓ Apple, Android, Web
Quoting				
Basic: templates, price look up	✓ + multistage	✓	✓ + advanced	✓ + advanced
Advanced: take-offs, retentions	✗	✗	✓	✓
Reminders	✗	✓	✓	✓
Cost estimating	✓	✗	✓	✓
Supplier pricing	✓ Static, user uploads from supplier	✓ Static, user uploads from supplier	✓ Dynamic, real time pricing from suppliers (Reece, AWM)	✓ Dynamic, real time pricing from suppliers (Reece, AWM)
Invoicing Integrates with accountancy program	✓	✓	✓	✓
Accept payments	! Must export to Xero and use a 3 rd party gateway	✓ Yes, using Stripe	✓	✓
GPS tracking				
Track smart phone	✓	✓	✓	✓
Track vehicle	✗	✗	! + additional cost	! + simTRAC with additional cost

Function	Simple Systems		Complex Systems	
				
Job management				
Scheduling	✓	✓	✓	✓
Job tracking in real-time	✓	✓	✓	✓
Variations	✓ Yes, basic	✗ No	✓ Yes, advanced	✓ Yes, advanced
Progress claims	✓ Yes, basic	✗ No	✓ Yes, advanced	✓ Yes, advanced
Asset Management	✗	✗	✓	✓
Integration				
MYOB	✓	✓	✓	✓
XERO	✓	✓	✓	✓
QuickBooks	✓	✓	✓	✓
Reckon	✗	✗	✗	✓
Calendar sync with Google	✗	✗	✓	✓
Groundplan	✗	✗	! Can upload file from Groundplan	✓
Reports	✓ Basic reporting, Customisable	✓ Basic reporting	✓ Advanced reporting: Estimator accuracy, cost to complete, labour utilisation, asset reports, customisation built in	✓ Advanced reporting: Estimator accuracy, cost to complete, asset reports, labour utilisation, customise with 3 rd party app + cost
Tailored forms	! Links with iAuditor at extra cost	✓ Yes, can save as PDF	✓	✓
Price	\$-\$	\$-\$	\$\$\$-\$\$\$\$	\$\$\$\$

Simple Job Management Systems: ServiceM8 vs Tradify

If you are veering toward a simpler solution, you need to decide if Tradify or ServiceM8 will work best in your business. Both do a great job at streamlining the quoting process, managing jobs and handling invoices with integration with finance packages.

Where ServiceM8 is superior:

Reporting: ServiceM8 has a wider range of reporting;

Tailored forms: ServiceM8 has the ability to create tailored forms such as a Job Safety Analysis form that can be saved as pdf files. Note: Tradify links with iAuditor for similar functionality but at an additional cost;

Processing payments: ServiceM8 can handle credit card payments using a built-in payment gateway like Stripe. Note: Tradify's process is significantly more clunky: it needs to export the invoice and have Xero handle the payment using a payment gateway.

Where Tradify takes the points:

Mobile devices: It's available on both Apple and Android;

More functionality such as the ability to develop pre-builds, multi-stage quoting, job variations and progress claims;

More suitable for companies that dabble in construction and need a little more sophistication. I intentionally say "dabble", since companies whose main work is construction should seriously consider the additional functionality and reporting that comes with AroFlo and simPRO.

Pricing: ServiceM8 vs Tradify

The final area of difference between the two is a big one, price. ServiceM8's pricing is tiered and based on the number of **jobs per month** (50/150/500/1500). There is no limit to the number of users.

Tradify is the complete opposite. Tradify's pricing is based on the number of **users** (also tiered) and has no limit to the number of jobs.

So the calculation of which system is cheaper will vary depending on the nature of your business. For a team of less than 10, both solutions would expect to end up costing less than \$5k per year; and for smaller teams (less than five) it would cost around \$1k per year.

Wrap up: ServiceM8 vs Tradify

In summary, I found both to be great products and would recommend either to smaller clients. The final decision would come down to 3 factors:

1. which mobile devices your team uses (Apple vs Android)
2. price (lots of users vs lots of jobs),
3. the subtle differences in functionality.

In my opinion, the ServiceM8 app is a more user-friendly but it's only available on Apple devices, which could be a problem if any staff have Android phones.

Your best bet is to try before you buy. Start by heading to the Appstore and downloading both: ServiceM8 has a demo environment, Tradify lets you try for free.

Complex businesses: AroFlo vs simPRO

Businesses that are more complex will be very limited by apps like ServiceM8 and Tradify. My coaching clients that had started out using these systems found that as their business grew and the jobs grew in size and complexity, they needed to do more work arounds in the field to use the simple apps. They also found that the basic reporting didn't cut it anymore.

In fairness, those simple apps were never intended to do those functions, and that's where AroFlo and simPRO come in.

AroFlo and simPRO: Designed for purpose

Both simPRO and AroFlo were designed from the ground up to handle requirements that are specific to job management in construction. Some construction necessities include take-offs and retentions, dynamic real-time pricing with key suppliers (which means the pricing is always up to date), detailed client asset management to make planned maintenance programs easier to manage.

These complex systems also provide next level reporting that allows owners and/or business coaches to dig beyond basic business health. This is real business intel that, when used cleverly, can identify areas for improvement.

AroFlo and simPRO: 3 deciding factors

With significant integration and training required, making the right decision between the two options is very important – whichever you choose, you're probably going to stick with it for many years. To help with this decision I've looked at it from 3 angles; ease of use, functionality and price. Note: this review is of the simPRO Enterprise version; there are other lesser and higher grades of simPRO but Enterprise is the most like-for-like with AroFlo.

1. Ease of use

Ease of use is of course very subjective. The trades business owners I coach have varying levels of tech ability and confidence (some are software geeks like me, others freely admit they're beginners), so I look at ease of use from the angle of all capabilities. Generally speaking, a good user experience in software allows the user to start broadly and then easily find a path to the function or detailed information they want.

Where simPRO is superior:

Navigation: I found simPRO to be more user-friendly and intuitive. Log in to simPRO and you are presented with a visual dashboard showing a map of current jobs and drop-down filters. The dashboard and filters lets you quickly see the current schedule by team, jobs, outstanding quotes, unpaid invoices. Everything is laid out in a logical sales funnel order.

Aroflo lost points here because the navigation bar is less intuitive making it harder to find your way around. Also, a new tab is opened for every view, so you end up with lots of tabs and no easy way to go back or forward.

Reports: The reports in simPRO were easy to find and well described, which made navigating to the right information efficient and quick.

Aroflo doesn't meet the grade; accessing reports in AroFlo is clunky. The reports are harder to find and not defined well. I had to use more guesswork (lots of trial and error looking at multiple reports) and clicks to get to the right destination.

Alerts: Alerts are prominent to ensure they get your attention, for example quote outstanding.

Winner of the "Ease of use" round: simPRO

2. Functionality

Functionality is quite similar between the systems – it’s clear that the competition between these companies keeps each other on their toes. That’s great for business operators!

In fairness however, I’m digging deep here to show differences between the two systems. The truth is that for the 3-5 feature differences there are dozens if not hundreds of features that are similar and powerful across both products.

Where simPRO has the edge:

Reporting: With over 50 standard reports, simPRO uses best in breed reports to make it easy for the system operators to access their business’ intel. You’re bound to find a report for what you need. There is the option for customised reporting with add-ons from 3rd party partners (at a cost).

AroFlo provides the ability to build customised reports, which is built into the monthly cost. That said, you have to know what you want to build, which can be like re-inventing the wheel.

Integration: simPRO has the advantage with a direct sync with Xero. With Aroflo you have to “push” the data to Xero, so you have to remember to do it every time.

simPRO also integrates directly with Groundplan (a separate program popular with estimators) at additional cost. Aroflo requires the user to upload a CSV output from Groundplan.

Mobile: simPRO has developed an App for mobile users giving them stronger “offline mode” functionality. Unfortunately with Aroflo, they only have a mobile version of the desktop site, which is not great to begin with.

Where AroFlo takes the points:

Integration: AroFlo is the only system (of these reviewed) that has integration for Reckon accountancy software, giving it slightly more client coverage than simPRO.

Winner of the “Functionality” round: simPRO

3. Price

The final consideration is price, which both companies have attempted to simplify but in actual fact it’s quite hard to determine pricing to compare apples with apples. Here’s a snapshot of the differences in pricing:

- simPRO office users are more expensive than AroFlo but their mobile users are cheaper
- AroFlo’s GPS tracking is cheaper than simPRO but their Digital forms function is more expensive
- simPRO don’t charge a monthly fee for Xero integration like AroFlo
- AroFlo charges a set price for setup whereas simPRO’s is customised to the client

As you can see you need to calculate the price *specifically* to your business. However in order to give you a ballpark cost I’ve done the calculations below using a typical business:

Typical business for pricing purposes:

2 people in the office who use digital forms and require subscription

8 people in the field / on the tools who require subscription, GPS tracking and digital forms

Includes the cost of Xero integration but doesn’t include initial setup costs and training or 3rd party add-ons.

 AroFlo		 simPRO (Enterprise)	
3 user pack	\$150 p/m	2 x office users	\$129 per user p/m
6 x additional users + 1 bonus active user	\$50 per user p/m + 1 bonus user free	8 x mobile users	\$39 per user p/m
8 x GPS tracking	\$10 per user p/m	8 x GPS tracking	\$49 per user p/m
10 x digital forms	\$29 per user p/m	10 x digital forms	\$14 per user p/m
Integration link	\$10 p/m		
Investment: \$830 per month = \$9,960 per year		Investment: \$1102 per month = \$13,224 per year	
Excludes – Installation \$899 – Integration setup \$399 (cloud) – 3rd party add-ons		Excludes – Installation & training (typically \$4800 to \$5500) – 3rd party add-ons	

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Winner of the “Price” round: AroFlo

Bonus round: system support

Whichever system you choose, there will come a time when you need support. According to dozens of online reviews by verified business users, simPRO’s support significantly exceeds AroFlo’s. And that’s worth taking into consideration because time wasted on not being able use the system efficiently and effectively could mean a big cost to your business in lost productivity and money.

Winner of the “Support” round: simPRO

Wrap up: AroFlo vs simPRO

There is a lot to like about both AroFlo and simPRO in terms of the advantages it will bring to the management and measurement of your business. Our clients in the trades businesses have an even number on each system, pointing to the fact there is no clear “winner” in the head to head comparison. simPRO probably has the slight edge on AroFlo in terms of ease of use and functionality but it comes at a higher price.

Trying them both on for your business is the ultimate advice using some of the questions and ideas in this guide to find the right system for you. It’s worth investing the time to get a demo or trial of both, to judge user experience and functionality for yourself.

Review

As with all software, features and pricing can change over time, so check out the latest information for yourself at their website:

Tradify: <https://www.tradifyhq.com/>

ServiceM8: <https://www.servicem8.com/au/>

AroFlo: <https://aroflo.com/>

simPRO: <https://www.simpro.com.au/>

We also suggest checking out some online reviews - both good and bad - so that you can have a balanced perspective before you dive in.

You can read a range of reviews here: GetApp: <https://www.getapp.com/operations-management-software/a/simpro-enterprise/compare/aroflo-vs-servicem8-vs-tradify/>

Still not sure? Give us a call and we can help you navigate a simple path on the complex journey of maximising your business productivity and profitability. Speak with Hugh Bowman today Ph: 0409 402 474
