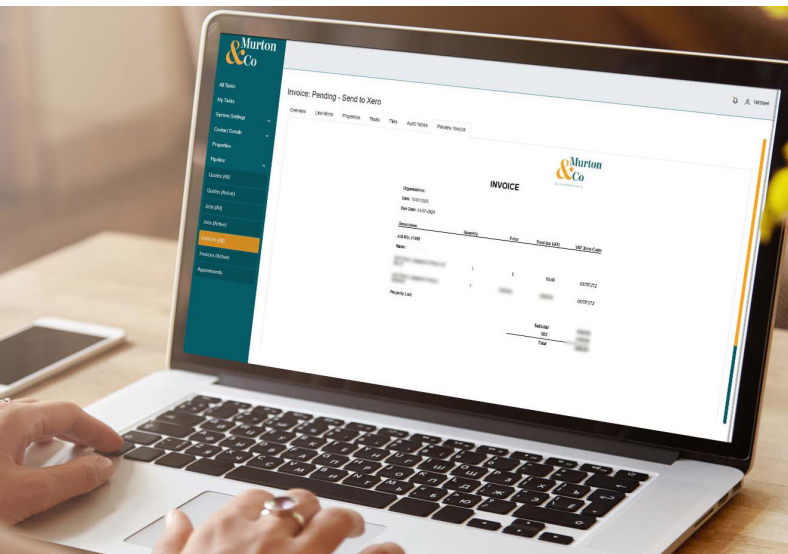


CRM & Workflow Software

Murton & Co

Delivering an integrated solution to handle project workflows, contact management, and Xero integration



The Customer

Murton & Co are trusted experts in energy efficiency, offering solutions to ensure compliance, comfort, and cost savings for both commercial and domestic properties, whether new builds or existing buildings.

Based in Lancaster, Murton & Co have over 20 years of experience in energy assessments, property plans, and regulatory compliance. They work with a diverse range of clients, including architects, surveyors, local authorities, property developers, and pension fund administrators.

Their Pain

When Workflow Max software was discontinued, Murton & Co needed a replacement for their CRM and Project Management system.

The new solution had to build on and enhance the functionality of Workflow Max while seamlessly integrating with Xero for finance management.

Additionally, the system needed to handle the complexities of tracking multiple contacts and properties within a single job and ensure efficient project management for portfolio clients.



Our Solution

To address Murton & Co's needs, we customised our Flight platform to manage their entire project workflow, from initial enquiry and quote through to scheduling, delivery, and invoicing.

The platform was designed to accommodate multiple contacts and properties for each job and track the stage of every service being delivered.

Its seamless integration with Xero ensured smooth financial management and invoicing processes.

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Key Features



Full project management from initial enquiry and quote to delivery, and invoicing



Centralised contact management for clients, suppliers, and other third parties



Automated communication workflows, including quote approvals, client updates, and project reminders



Task checklists and workflows tailored to specific job types and stages



Document storage linked to job records for easy access and organisation



Automated generation of key documents such as quotes and project updates



Open API for integration with Xero and other third-party systems



Impact

"Flight has comprehensively streamlined our operations, providing us with a tailored system that meets all our needs. From managing complex workflows to integrating seamlessly with Xero, it has transformed how we work. The ability to track job stages, automate communications, and analyse profitability has made a significant difference in our efficiency and service delivery."

Caroline Murton-Lavelle
Director

Want to know more about our CRM and Workflow Software?

Get in touch or book a free demo

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blue wren

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