joiin | ENGAGE ACCOUNTING, TAX & ADVISORY

CUSTOMER STORY
PROPERTY MANAGEMENT

CASE STUDY

MULTIPLE XERO FILES INTO LIVE, DECISION-READY REPORTING

Sajit runs Engage Accounting, Tax and Advisory, specialising in property management businesses and running their financials and group reporting through Joiin. This is a deep dive on one of those clients: a property investment group with **more than 15 legal entities**.

£350k+
saved on one property, in one quarter

FULL STORY ON PAGE 2 ↓

5 hrs
of monthly consolidation, now minutes

15+
entities reported as one group

3 years
of project-level forecast for every property

THE CHALLENGE

Each entity holds a separate property. Consolidating the group meant pulling data from Xero for every entity and pasting it into a master Excel workbook, with intercompany balances reconciled by hand. One touched cell could break the file. Five hours a month, per client, and nothing was live.

THE SOLUTION

Consolidated P&L and balance sheet reports now pull straight from Xero. Intercompany reconciliation sits inside Joiin, and prior-period changes flow through without a rebuild. The output feeds a project-by-project dashboard: historic performance, a three-year forecast and the end-of-year outturn for each property.

"A businessperson wants to know what they spent and what they have to show for it. **Then what they can sell it for.**"

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BENEFITS

01 Five hours, down to minutes
Every entity consolidates straight from Xero, with no master workbook to paste into or break.

02 Intercompany, handled
Reconciliation lives inside Joiin, and late adjustments in Xero flow through automatically.

03 Advice that pays for itself
Live, property-level numbers let Sajit go beyond compliance, surfacing more than £350,000 of savings in a single quarterly review.

About Joiin: Group financial reporting and consolidation software for accountants and finance teams. Joiin pulls data straight from Xero, QuickBooks, Sage and more to build consolidated, multi-currency management packs in minutes, with Joiin Intelligence adding AI commentary and Q&A on top.

Smarter financial reporting & consolidation. Powered by Joiin Intelligence.

Start a free trial at **joiin.co**

Client details have been anonymised and figures rounded for confidentiality.

THE £350K+ MOMENT

One property, one quarterly review

A single quarterly review by Sajit on one rental property surfaced three overlooked cost areas. Addressing them delivered combined savings of more than £350,000, proof of the value a proactive, numbers-led review adds beyond routine compliance work.

c. £200k
ESTIMATED SAVING

Refinancing at a more competitive rate
The interest rate on the property's bank loan was benchmarked against current market terms, revealing a clear refinancing opportunity. The client refinanced on improved terms.

c. £100k+ a year
ESTIMATED SAVING

Reduced management costs
Ongoing management fees were benchmarked against comparable market rates and used to reduce ongoing costs.

c. £50k
ESTIMATED SAVING

Tighter occupancy management
Re-letting the property more quickly to reduce voids, speeding up repairs and maintenance, and shortening the lead time between deciding to sell and going to market.

INSIDE THE MONTHLY WORKFLOW

How Sajit puts Joiin to work

- → **Occupancy sits at the top of the pack.** A property under repair is a property losing money.
- → **Every loan's interest rate in one view,** so external finance can be benchmarked against alternative lenders.
- → **Hold-or-sell calls, costed first.** The crystallised profit or loss is in front of the owners before they decide.
- → **Development and rental from one report set,** sliceable on demand.
- → **Late Xero adjustments flow through automatically.** No more five-hour rebuild.

"Accounting is subjective. A businessperson wants to know what they spent and what they have to show for it. Then what they can sell it for. **Joiin lets me give them that answer every month.**"

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