How I Stacked It
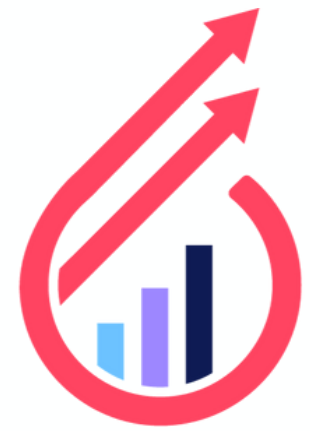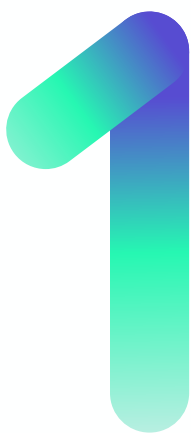
Jon Plant
Head of Finance at
Wilson George Group

1

Manufacturing

"Storm is our bespoke manufacturing warehouse system, we've been building this for a few years."

2 Optical Character Recognition

Dext allows businesses to electronically capture and store receipts, invoices and other supporting documents to ensure they keep accurate and secure financial records.

"We use Dext's OCR to extract invoice data, which is then sent to ApprovalMax for authorisation before being pushed to Xero."

dext.com

3

ApprovalMax

ApprovalMax helps you to get your financial documents approved on time.

"We're using ApprovalMax when it comes to raising credit notes across any of the businesses, it's been really useful. I love ApprovalMax so much that they printed and gifted me my very own ApprovalMax t-shirt."
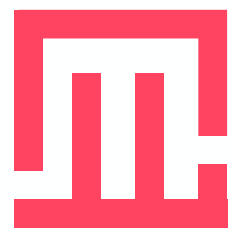
approvalmax.com

4 Payroll

Automate recruitment, HR, payroll and benefits with Employment Hero.

"When it comes to payroll, we went down the Employment Hero route. We were using Xero, but we quite liked the idea of using Employment Hero because it means we're able to submit expense claims through there as they've got an integration with HMRC that automatically updates any of the tax codes."

Mayday

5 Intercompany Reconciliations

Intercompany and intra-entity charge automation, balance sheet recs, cross-entity bank rec.

"We use Mayday for the intercompany reconciliations. There's a lot of intercompany loans which have been set up, there's a lot of recharges which are going on, and there's a lot of trading going on between the entities, so Mayday has really streamlined that whole process."

6

Reporting

Fathom combines insightful reporting, fast cash flow forecasting and actionable financial insights into one refreshingly easy business management solution.

"We recently introduced Fathom as our reporting tool. It looks very smart and I love the ability to be able to copy reports from entity to entity.

fathomhq.com

HubSpot

7 Customer Relationship Management

HubSpot's CRM platform contains marketing, sales, service, operations, and website-building software for growing businesses.

"We are looking to integrate HubSpot and build that into Xero as our CRM. That will free up a little bit of space in Xero regarding the tracking categories that could be used."

hubspot.com

8

E-commerce

Automatically sync your Amazon, eBay, Shopify and Etsy sales to Xero.

"This integration is unbelievable. We've got four e-commerce stores that do about six million pounds turnover annually. Link My Books does everything for you once you get it all set up, at the click of a button it imports a dummy invoice effectively to get the correct VAT and all the revenue figures into Xero – an absolute game changer."

linkmybooks.com