



How I Stacked It

Martin Goodwin

Group Finance Manager at
Open Box Software





Intercompany

*“**Mayday** has been instrumental in managing intercompany billing, multi-currency loans, related interest, and inter-divisional cost allocations. Despite our unique requirements, it has managed everything seamlessly, ensuring that all balances are accurate at month-end.”*

getmayday.com



Reporting

*“**Datasights** has improved our reporting by offering the flexibility to use Xero source data per transaction, whereas most systems only provide transactions in reporting currency. Kevin and his team were invaluable during setup. While we had to work around some challenges to ensure that we could use it for our unique needs, the end result is powerful Power BI dashboards for management accounts, financials, budget/trend analysis, consolidations, and more. These dashboards allow detailed analysis tailored to management levels and divisions, through access controls, saving four days of report preparation each cycle.”*

datasights.co



Employee Timesheets, Projects, and Billing

*“**Projectworks** is central to our operations, projects, and timesheets. It offers superior access controls compared to Xero, ensuring appropriate access for time logging and other tasks. Project managers oversee team utilisation and timesheet approvals, while finance approves and posts to Xero. Integration with Xero allows the team to view invoices and payment statuses without needing direct Xero access. Additionally, Projectworks connects to Power BI for comprehensive tracking dashboards, further integration with payroll and Xero will enhance its capabilities.”*

projectworks.com

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Bill Processing

*“**Hubdoc** is functional but lacks the flexibility of other tools. While we currently use it due to its free availability, we are exploring alternatives such as Dext and Lightyear.”*

hubdoc.com



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Employee Expense Claims

*“While **Xero Expenses** are effective and cost-efficient for processing expenses, we are looking for a solution with better approval workflows. The challenge is finding an add-on that works in RSA, the UK, and the US. While there are many options for the UK and US, choices for RSA are limited. Airwallex seems ideal but doesn’t operate in RSA, and we manage numerous FX payments, intercompany transfers, and expense claims.”*

xero.com



CRM

***“Microsoft Dynamics 365 CRM** manages client information and forecasting. Integrated with Projectworks for project management, it connects to Power BI for comprehensive dashboards, though it is not directly linked to Xero.”*

microsoft.com/en-us/dynamics-365

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Payroll

*“**Payspace** is an excellent cloud payroll solution in RSA that integrates with Xero to post monthly payroll journals. It also connects directly with Power BI, allowing us to link payroll with timekeeping, projects (via Projectworks), and Xero. This integration helps us automate company, divisional, project, and customer P&Ls, ensuring all levels of our business remain profitable and efficient.”*

payspace.com