



How I Stacked It

Chloe Sloane
Financial Manager at
Creative CFO





Financial Foundation

*"**Xero** is a user-friendly, cloud-based accounting platform that simplifies financial management. It offers real time reporting, automatic bank feeds, and a large integrated app directory, enhancing productivity and decision-making. Its collaborative features enable multiple users to access financial data simultaneously, improving communication and insights for high growth businesses."*

xero.com

2 Receipts and Invoice Management

“Dext Prepare automates the capture of receipts, invoices, and bank statements. Integrated with Xero, it reduces manual data entry, allowing the team to focus on higher-value tasks.”

dext.com



Payroll

“SimplePay’s user-friendly interface automates payroll processes, reducing manual workload and ensuring compliance. Its accurate calculations enhance payroll efficiency, freeing up time for other strategic activities. Their API allows for the instant posting of payroll journals to Xero and to government institutions for reporting purposes.”

simplepay.co.za



4 Inventory Management

"Cin7 offers a seamless solution to track stock in real time. By syncing with Xero, it enables customers to optimise inventory levels and gain insights into their stock flow and management."

cin7.com

5

Inventory Management

*“**Fathom** simplifies multi-entity reporting and analysis, enabling Creative CFO to seamlessly consolidate financials across multiple jurisdictions. The reports are customisable and provide clients with deep insights into financial performance, financial position, and financial and non-financial KPIs.”*

fathomhq.com



Automation

*“**G-Accon** provides seamless integration with Google Sheets for real-time insights into accounting information and data without having to log into Xero. Advanced data analysis and reporting from multiple entities allow us to leverage real-time data insights effectively.”*

[accon.services](https://www.accon.services)

7

Data Workflows

*“**Make.com** is a versatile automation platform that connects apps and streamlines workflows with ease. Its intuitive interface allows us to create custom automation without coding, saving time and enhancing productivity.”*

make.com

A decorative graphic at the bottom of the page consisting of a wavy, organic shape filled with a gradient of purple and pink colors.



Intercompany Transactions and Balances

*“**Mayday** enhances Xero by simplifying intercompany transactions and balances, streamlining reconciliations across entities, and speeding up month-end closures. It boosts financial efficiency and accuracy, allowing our team to focus on strategic analysis with less time spent on manual tasks.”*

getmayday.com



Woo COMMERCE

 **shopify**

E-Commerce

*“For customers with online stores, **WooCommerce** and **Shopify** allow for easy integration with Xero. These platforms sync sales and inventory data, ensuring accurate reporting and streamlining e-commerce operations.”*

woocommerce.com

shopify.com



10

Task Management

"Asana organises Creative CFO's projects, helping the team track progress and meet deadlines efficiently. Its visibility across tasks and projects ensures timely completion of client deliverables. We know exactly who is doing what and by when."

asana.com