



How I Stacked It

Liam McNamara
Co-Founder at Project
Alfred





Accounting System

"Xero is an excellent core accounting system and serves as the base that enables all other apps to link to a shared source of truth. It limits tracking categories to two, which can be a drawback, especially for larger clients, but generally works well."

xero.com



Sales Invoice Collection and Direct Debits/Card Payments

“Pinch Payments integrates seamlessly with Xero, instantly reconciling payments made to sales invoices. It offers a smooth customer experience, helping accelerate payments and improve cash flow.”

getpinch.com.au

Dext

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OCR and Document Intake

*“**Dext** offers the best OCR among Xero-integrated tools and is cost-effective considering the quality. The recent addition of bill approvals meets most needs, though it doesn’t handle highly complex scenarios.”*

dext.com



employmenthero



Payroll

*“**Employment Hero** is excellent when a business outgrows Xero’s payroll limits (200 employees), but it is best used well before that. It’s a full payroll solution allowing for complex rules and award compliance. The initial setup can be time-consuming and overwhelming due to numerous options and settings, but once done, it is worth it.”*

employmenthero.com

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Supplier Payments and Corporate Cards

*“**OFX** offers competitive FX rates, a solid payments workflow, and makes it easy to issue new cards for team members. However, its expense management could use improvement, especially when integrated with bill OCR, as the flow isn't very straightforward. **Airwallex** also has good FX rates and can pay countries other providers can't, which is a valuable feature. Its international batch payments are a plus, though its OCR and expense management aren't as strong as some other market options.”*

ofx.com

airwallex.com



Tracking and Intercompany Transactions

*“We primarily use **Mayday** for allocating expenses and employee splits across tracking categories within a single entity. While not necessarily designed for this purpose, it remains effective.”*

getmayday.com

A large, stylized number "7" with a gradient from purple to pink.

Consolidation

*“**Joiin** is quick when it comes to consolidation. Users can see transaction-level data with deep links back to Xero. The reporting isn't as 'pretty' as others, and dashboards aren't as customizable as one would like.”*

joiin.co



Extracting Data into Google Sheets

*“**Coupler.io** offers flexibility in extracting report data from Xero into Google Sheets, including transaction-level data. However, it can be an issue for large businesses wanting transactional information, as it quickly hits Xero’s API limits. The setup is time-consuming and lacks a one-size-fits-all approach. Users will encounter a learning curve, but once mastered, it enables analysis in Google Sheets, allowing for the combination of actual results with more complex, spreadsheet based forecasts.”*

coupler.io



Looker Studio



Complex Reporting Requirements

*“**Looker Studio** has a steeper learning curve than others and requires significant setup to build reports. However, it enables the creation of complex dashboards using data from Google Sheets, making it easy to combine actual results and forecasts in a single report. The visual output is notably more modern than Power BI.”*

lookerstudio.google.com



10 Google Sheets for Forecasting

*“**Google Sheets** integrates with a variety of tools, including Xero and Hubspot (via Coupler.io), which allows users to combine forecasted pipeline data and actuals from Xero for accurate, ongoing cash flow forecasts. It also serves as a simple data source for Looker Studio’s complex reporting.”*