



BuildPass simplify their process to reinforce reporting





Buildpass is the easy-to-use all-in-one software solution for managing construction sites.

Providing a modern and simple way to complete, store and communicate site based documentation including SWMS, inductions, tickets, attendance and checklists, Buildpass's SaaS software is used by hundreds of construction companies across Australia and New Zealand.



The Challenge

The Buildpass team uses two of the leading software solutions to underpin their revenue and financial operations. Stripe is used for subscription management and payments, and Xero, Australia's # 1 SaaS accounting platform, is used as their accounting software.

While setting up subscriptions and taking payments is made easy by Stripe, getting the required level of detail in their Xero financial reports proved a challenge for BuildPass.

On a regular basis the BuildPass accounts team would manually create invoices in Xero - **this would take up to 4 hours per week.**

While this might seem like a simple task, there were also issues with miscoding of Stripe products to incorrect Xero accounts which can provide misleading reports. In addition, any modification to Stripe subscriptions would need to be manually updated in Xero.

Attempts had been made to use automation tools, however challenges with tax rates and modifications resulted in lots of manual workarounds.



The Solution

BuildPass were already using LeaveCal by Finlert to manage visibility of their staff availability, so when the team discussed looking at implementing SubSync by Finlert, the BuildPass team were keen to explore the possibilities.

Leveraging SubSync to automatically create Stripe invoices in Xero, BuildPass also benefits from the two-way sync which includes payment and voided invoices. This allows full visibility of Stripe invoices from within Xero.

By using SubSync by Finlert BuildPass is able to focus more time on their core business and management is less concerned about manual errors.

The image displays three screenshots illustrating the integration of SubSync, Stripe, and Xero:

- Top Left:** A Stripe invoice for \$1,980.00, invoice ID BB61F83E-0004, dated 14 Aug 2023.
- Middle:** The SubSync 'Event History' table, showing a list of events with columns for Time, Result, Invoice, Contact, Action, Amount, Stripe, and Xero.
- Bottom Right:** A Stripe invoice for \$6,049.35, invoice ID INV-0017, dated 10 Jul 2023, with a detailed item table.

Time	Result	Invoice	Contact	Action	Amount	Stripe	Xero
14th Aug 2023 3:21 pm	Success	CCB25950-0005	Ren Hoek	Created	\$110	Nathan Test Finlert	Finlert Demo Company
10th Aug 2023 4:34 pm	Success	67871342-0001	Simpy J Cat	Created	\$110.00	Nathan Test Finlert	Finlert Demo Company
3rd Aug 2023 2:30 pm	Success	CCB25950-0003					
3rd Aug 2023 2:17 pm	Error	CCB25950-0001					
2nd Aug 2023 11:58 am	Success	CCB25950-0000					
1st Aug 2023 1:35 pm	Success	CCB25950-0008					
1st Aug 2023 11:35 am	Success	CCB25950-0007					
1st Aug 2023 11:21 am	Error	CCB25950-0006					
		CCB25950-					

Item Code	Description	Quantity	Unit Price	Disc %	Account	Tax Rate	Employee Group	Amount A/G
	A expense item	7.00	700.00			GST on Income		5,000.00
Subtotal								5,000.00
Total GST 10%								500.00
TOTAL								6,049.35

Getting Started

Connecting Stripe and Xero into SubSync takes less than 5 minutes.

SubSync requires an API key from Stripe and a Xero file to be authenticated - it even supports Xero SignIn and Xero's single-click SignUp process.

Once connected, companies can choose to allocate invoice line items to a Xero Product or a Xero Account.

For Buildpass, Stripe products have been mapped to Xero accounts.

Once connected, any new invoices created in Stripe are automatically created in Xero.

“SubSync is saving us 4 hours per week of manual effort. Not to mention the reduction in errors”

- Matt Perrott CEO BuildPass



If SubSync is something you feel would benefit your business, you can sign up for a free 14-day trial by going to subsyc.finlert.com. Or if you would like to discuss more, get in touch with us using the details below:



finlert

www.finlert.com



contact@finlert.com