How Expandly made Halo more efficient.

Halo is committed to two things only: serving "the world's best coffees, in a way that's best for the world."

The first-ever 100% compostable Nespresso compatible capsule comes in a variety of blends that allows anyone to get their caffeine fix, without impacting the environment.

But, Halo's hate of waste isn't restricted to plastic coffee capsules. Halo aims to operate its Shopify-powered business in the most cost and time-efficient way possible.

That's why, when it came to accounting, CFO Gerhard knew that Xero was the only answer. The only question was how to send sales orders to Xero in the most efficient way possible.

The problem

Halo was experiencing difficulties importing Shopify invoices into Xero. It wasn't that it couldn't be done, but that the process was manual, long-winded and incredibly time-consuming.

Finance would spend hours each week downloading orders into a CSV, formatting that CSV, uploading the CSV to Xero and then checking that it had been correctly imported.

"This wasn't efficient, and it certainly wasn't sustainable," says CFO Gerhard.

Company name
Halo

Product
Coffee capsules

Sales channels
Shopify

About
Halo is a premium eco-friendly coffee capsule company.

Its fully compostable coffee capsules are compatible with Nespresso machines and are filled with specialty grade coffee - meaning that no one has to compromise great tasting coffee for helping the environment.

Website
halo.coffee

Halo was using a free Xero eCommerce app to assist, but that came with its own problems.

"The app posted orders and fees to a control account, but it never balanced, so I still had to reconcile each order and fee individually to get the control account to balance. The tax mapping was also an ordeal, with each purchase from a new country posting incorrectly until I logged in and set the tax mapping for the specific country.

"I constantly had to keep an eye on orders. It was a nightmare and such a waste of time."

Expandly was the magic pill

The solution

Halo needed a reliable Xero-Shopify integration that would send Shopify invoices to Xero automatically and in the correct format.

They started by looking at the Shopify app stores to see what was out there. But, specifically, they wanted something more than a Shopify-Xero integration; they wanted something that created as little additional work as possible.

Expandly ticked all the right boxes, allowing Halo to schedule orders automatically to Xero each day, auto-marked as approved, grouped to avoid Xero's soft transaction limit and to the correct bank account based on payment method.

It was, as they say in the coffee industry, the chocolate on top of the cappuccino.

The result

Increased efficiency, automation and accuracy.

With Expandly automatically assigning Shopify orders to the right accounts, tracking categories and payment statuses, CFO Gerhard certainly had more time. But that wasn't the only benefit for Halo.

Accuracy

With less manual entry and spreadsheet hacking, Halo's accounts are 100% accurate, making reconciliation quicker and easier.

Manageability

With increased automation, Halo can confidently handle an increase in orders, without worrying about the time it takes uploading those orders to Xero.

Growth

Using Xero's tracking categories, Halo is confidently selling internationally, knowing that Expandly will automatically assign orders to the correct country.

Overview

And, with everything happening automatically, Halo has a better view into its overall financial performance

CFO Gerhard's final thoughts

So, what are Gerhard's final thoughts?

> *"Expandly really helps to take the pain out of a routine process and ensures accuracy, so no time is wasted reconciling sales orders and receipts."*

In other words, there's a latte love for Expandly.