Workflow Automation for a Singapore Agency: Connecting Sales, Finance and Project Delivery

How n8n connected Xero and the CRM to automate project setup, coordinate handovers and improve accuracy.

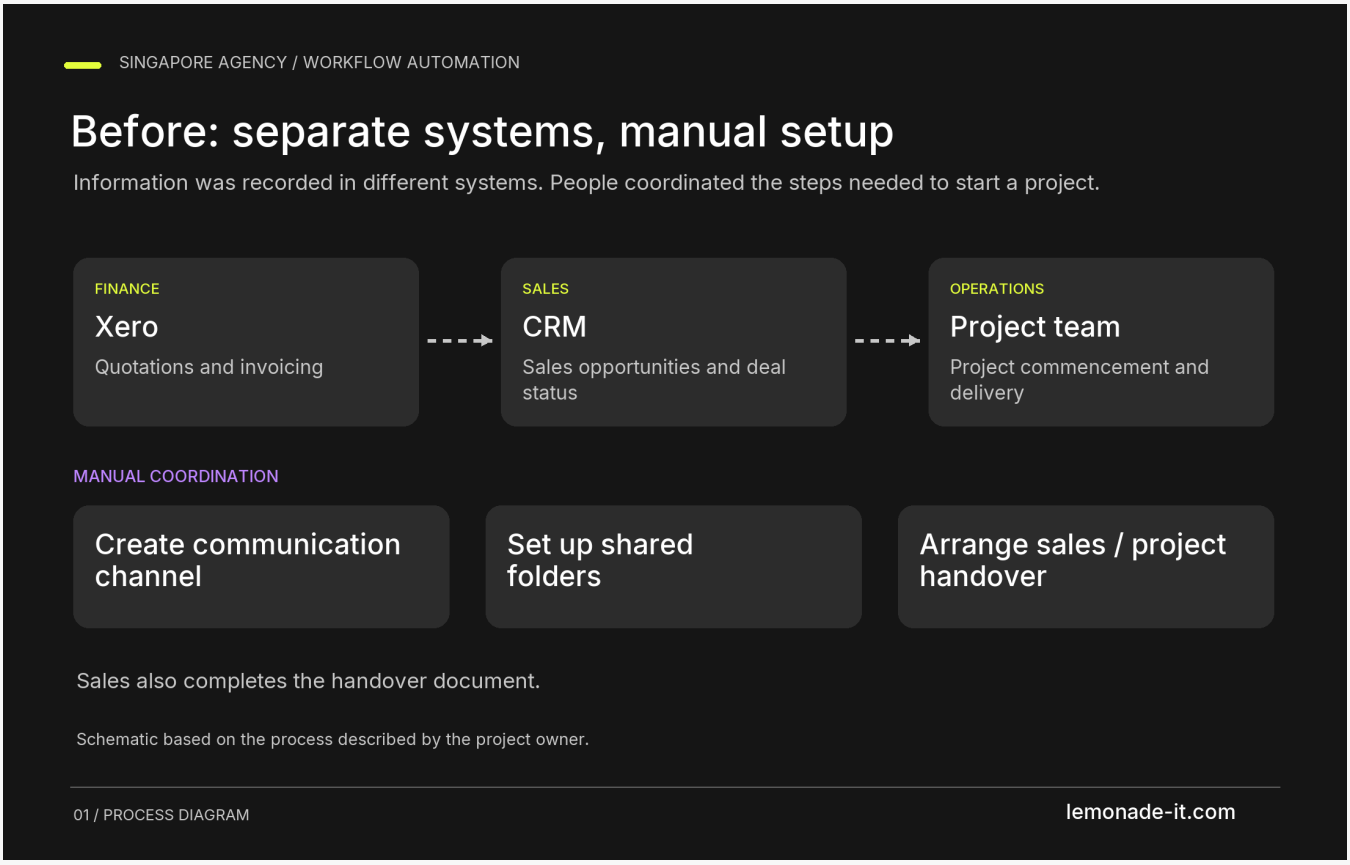
CONNECT	Xero + CRM
TRIGGER	Deal marked Won
COMMENCE	Project setup + handover

Reported outcomes: less setup work, fewer missed handovers, earlier project starts and greater accuracy.

The challenge: a manual start to every project

An agency in Singapore used separate systems for sales, finance and project delivery. Xero handled quotations and invoicing, while the CRM tracked sales opportunities. Moving a confirmed engagement into delivery still required the team to coordinate the setup manually.

An update in the finance system did not automatically prepare the project team to commence work. Staff needed to create the communication channel, set up shared folders and arrange the sales-to-project handover.



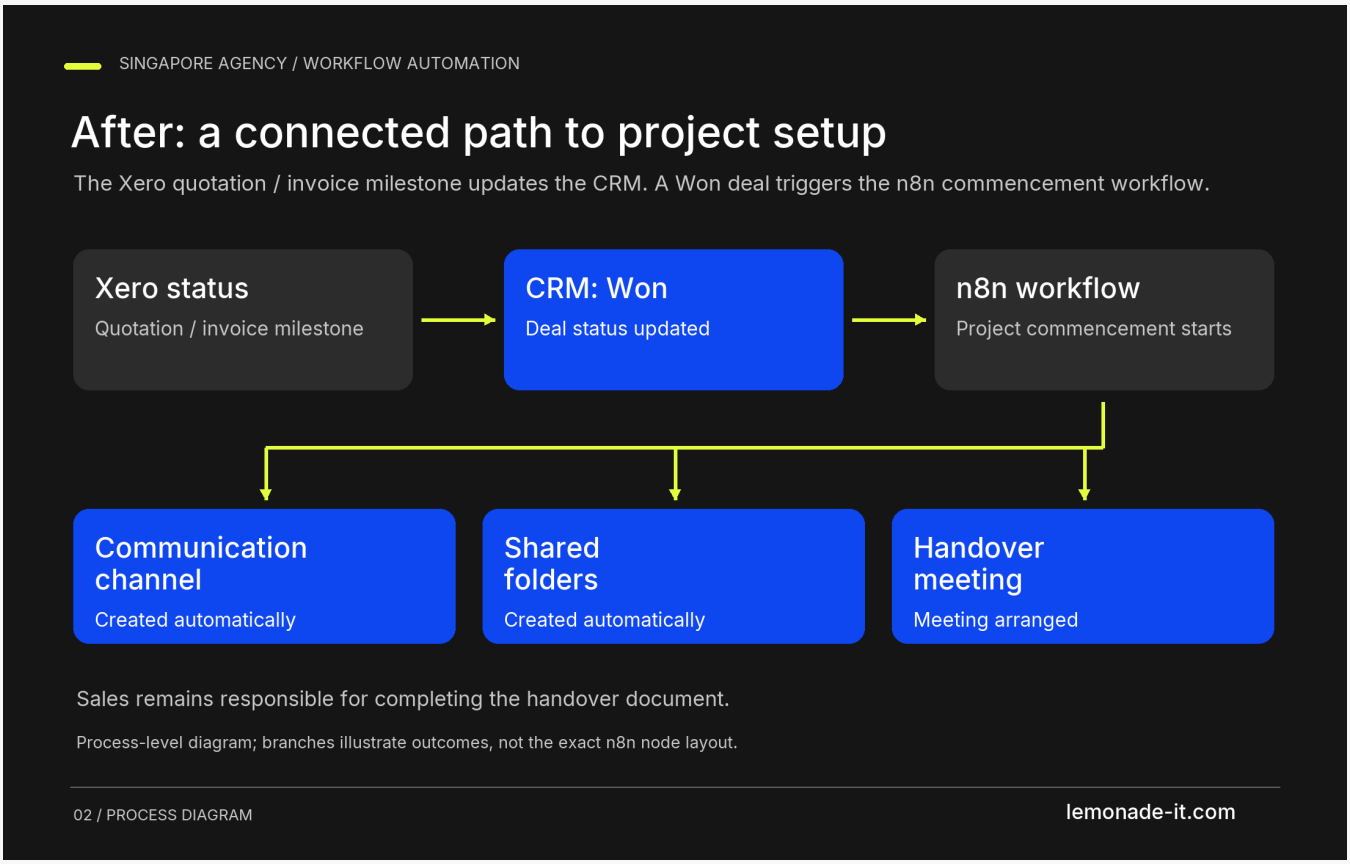
Working across the handoff

Sales also needed to complete the handover document. Each setup task was necessary, but progress depended on individual coordination and follow-up.

The agency needed a consistent connection between the commercial milestone and the practical work of commencing a project.

The solution: connect Xero, CRM and n8n

The relevant quotation and invoicing status in Xero updates the corresponding CRM deal to Won. That change triggers the project commencement workflow in n8n.



01 / Update the sales record

The Xero milestone moves the corresponding CRM deal to Won, giving the workflow a defined starting point.

02 / Prepare the working spaces

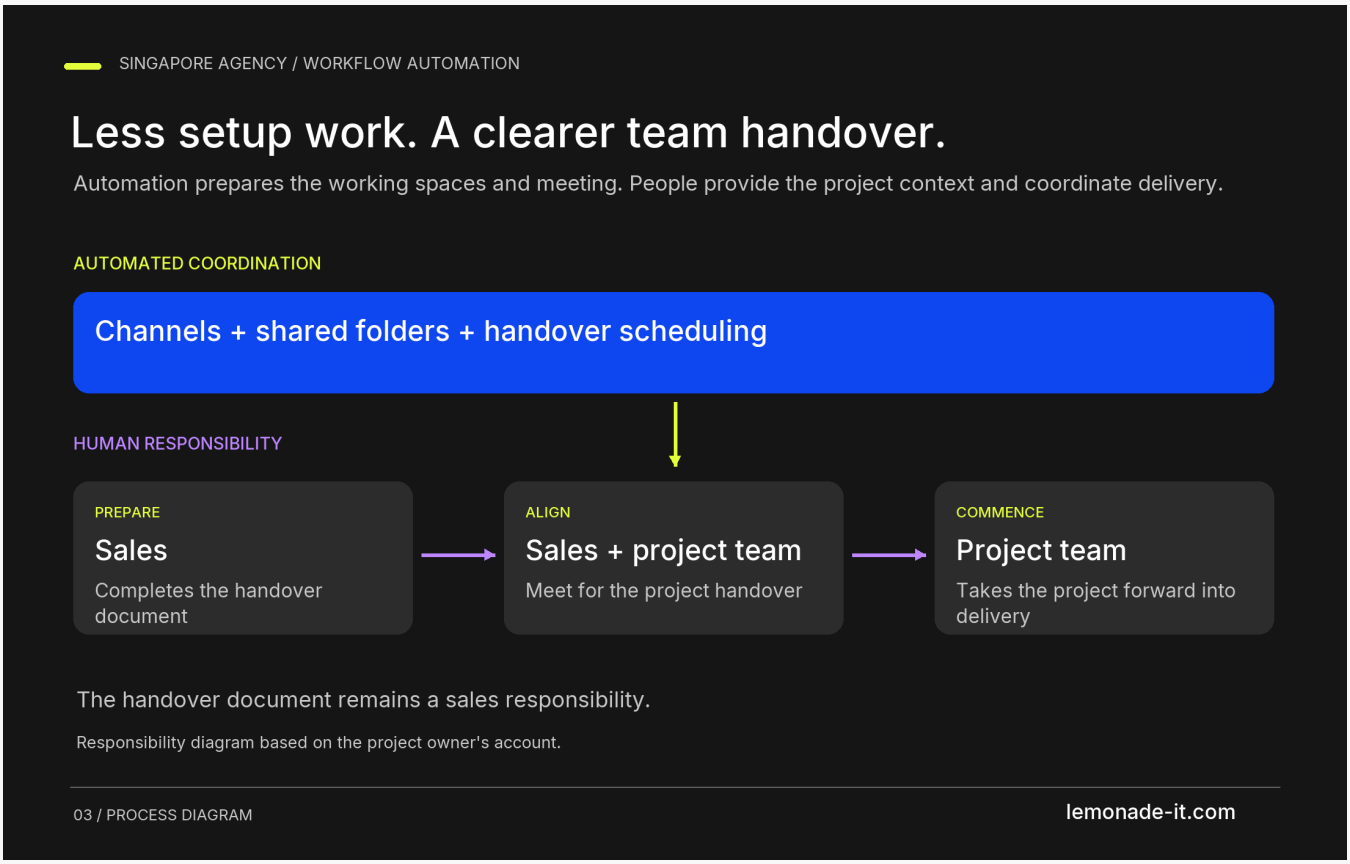
The workflow creates the communication channel and shared folders, reducing the need to initiate each setup step separately.

03 / Arrange the handover

A meeting is arranged between sales and the project team so they can transfer the project context.

The handover and the reported results

Automation handles the setup and scheduling around the handover. Sales remains responsible for completing the handover document, and the teams conduct the handover together.



More consistent project commencement

The agency reported less time spent on setup, fewer missed handovers, projects starting sooner and greater accuracy. These are qualitative observations; time savings and error reductions have not been formally measured.

Connecting the systems reduced manual coordination at the transition from a won deal to delivery. The teams can focus on the handover itself, with working spaces created and the meeting arranged.

Connect your finance, sales and project workflows

Talk to Lemonade about workflow automation that connects the systems your business already uses.