



Quick2Xero Overview & Guide

Version 1.0 October 2017



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Overview

Quick2Xero synchronises data in SuiteCRM with data in Xero so that Accounts, Contacts and Invoices can be generated in Xero and vice versa so that you don't have to re-key in data. As information is updated in either CRM or Xero the updates are seamlessly transferred. For instance, you can convert a quote in CRM to invoice and have the invoice generated in Xero automatically. Payments received into Xero are visible in CRM. CRM users (who may not have access to Xero) can create invoices and see aged debtor information.

This development users (and adapts) Sales Agility's Advanced OpenSales module.

Feature Summary

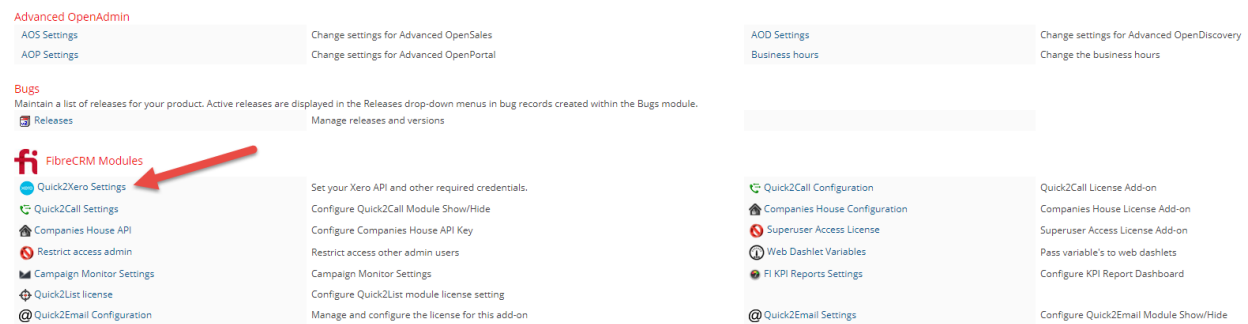
1. Synchronizes **Tax rates** from Xero to CRM
2. Synchronizes **Currencies** from Xero to CRM
3. Synchronizes **Chart of Accounts** from your Xero to CRM
4. Synchronizes Xero **Contacts** to and from CRM (Accounts and Contacts)
5. Synchronizes Xero **inventory** to and from CRM (Products)
6. Synchronizes Sales & Purchase **Invoices** to and from Xero (AOS Invoices)
7. Synchronizes **Payment** and **Credit Note** history and status from Xero to CRM
8. For CRM Accounts you can set default Tax rates
9. For CRM Products you can set default Tax rates
10. Schedulers created for automating the transfer of data on a regular schedule, including:
 1. Create invoices in Xero from data added to CRM from external sources (e.g. direct data feed into CRM database from Iris Fees ledger)
 2. Import new and updated Xero Invoices into CRM
 3. Import new and updated Xero Contacts into CRM
 4. Import new and updated Xero Inventory into CRM
11. Flexible field mappings facility in Admin. Pick which of your custom fields connect to fields in Xero
12. Streamlined **Line Items** in Quotes and Invoices - unnecessary fields removed
13. Flexible invoice number options gives you the choice of whether to use Xero or CRM for automatic invoice number generation

Installation

Having purchased this module you will receive an installation file. Use Module Loader in CRM to install this module into your CRM

Connecting CRM to Xero

Once installed go to Admin and find the Quick2Xero icon located in the section called "FibreCRM Modules".



You will need to enter your License Key in the License section. You should have received a license key from your vendor when you purchased the module.

Quick2Xero License Add-on: Quick2Xero Configuration

To Locate Your Key

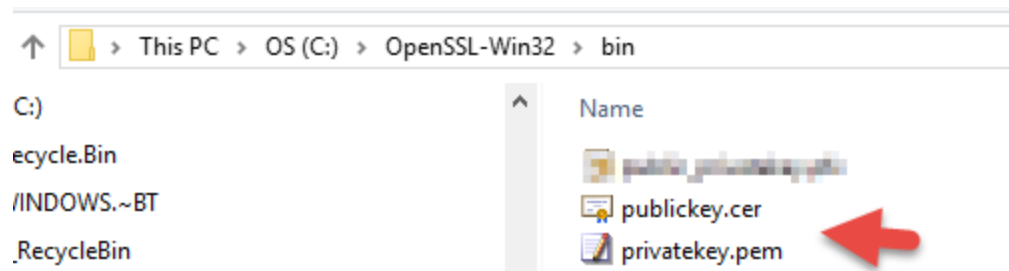
1. Login to store.suitecrm.com
2. Go to Account->Purchases
3. Locate the key for the purchase of this add-on
4. Paste into the License Key box below
5. Hit "Validate"

License Key

To connect the CRM to your Xero application go to the API tab.

You will need to create a security certificate which must be provided to Xero. Xero will supply an API key with the provided information. Use the API key in CRM. This process only takes a few minutes but can be fiddly if you don't know what you are doing and FibreCRM can provide chargeable professional services to help set this up on your system. Please enquire.

1. A Public/Private key pair <https://developer.xero.com/documentation/api-guides/create-publicprivate-key>. Private applications like CRM and Xero must sign messages using the OAuth RSA-SHA1 method of security. This requires that you create a public/private key-pair, and upload the public certificate during application registration. Once created you need to upload this to Xero. Xero, in turn, will provide you with an API Key and Secret which you paste into the appropriate place in CRM. This process will create two files on your computer. If you have followed Xeros recommended program (OpenSSL) then the files that are created will be located on your computer in C:\OpenSSL-Win32\bin. Open each file in a text editor such as Notepad and copy the contents.



If these files do not exist, go back over the process and identify where these files are being created (it's possible they are being created in a different location or with different file names).

2. Once you have the public/private key pairs go to Xero and generate a private application. <https://app.xero.com/Application/>
3. Xero will supply the API key and Secret. Copy these keys and the certificates and paste them into the appropriate places in CRM. In CRM go to Admin > Quick2Xero > API

| | |
|------------------|---|
| Consumer Key: | <input type="text"/> |
| Consumer Secret: | <input type="text"/> |
| Public Key: | <pre>-----BEGIN CERTIFICATE----- MIIC9zCCAmCgAwIBAgIJAN33F2jFT5bMA0GCSqGSIb3DQEBCwUAMIGSMQswCQYD VQQGEWVSczERMA8GA1UECAwIQ29ybndhbGwvETAPBgNVBAMCEZhbG1vdXR0MQ4w DAYDVQQKDAVGaWJyZTEUMBIGA1UECwwLRGV2ZWxvcG1lbnQxETAPBgNVBAMMCEhl bHBkZXNrMSQwlgYJKoZIhvcNAQkBFhVoZWxwZGVza0BmaWJyZWNYbS5jb20wHhcN MTcxMDAxMDcxMTE2WWhcNMjIwOTMwMDcxMTE2WjCBKjELMAkGA1UEBhMCVUsxETAP</pre> |
| Private Key: | <pre>-----BEGIN RSA PRIVATE KEY----- MIICXQIBAAKBgQCdZjrDaZTPHs7+1IOlg5ZhcVCF0BV5WAR94SDh0MjWiPsEMFmg vjAX+7LGesSRkl5nCLxm9LI3hD7zdEx4KDln/HlytomdkGX7K9ZXndrCMGL23ZKz F+svqOsL7Y/rbGrN6g+gKn0aaVqTxowl5JiiP49Lnb3rWEFd6kXJinasQIDAQAB AoGBAJSwPBbZqH+4pOZL5ZzXn7nRZ7XhCkgIA6k+gOeRaghwQmCEpEabl6ekWA/z bbnuwUsoD4Ja8NGcljM5y/s+TZHJQM/xacBy9/BeLWNeeVpJvNlalahHROJ4Tcn</pre> |

Upon successful connection you will see the following.

Xero Connection: Success

Best Practice Advice – Things You Need To Do First

This module is designed to move large amounts of data between your finance package and your CRM package. The last thing you want to do is mess up your data by not defining all the options before the sync begins.

This section is designed to point you in the right places so that when the synchronisation starts everything goes into the correct place, duplicate checking is performed correctly and everything just works. Here's what you need to consider:

1. **Don't switch ON the sync until you have configured your options.** By default all sync'ing is disabled so after installation and connection to Xero don't forget to switch on sync'ing. Before you do switch on, you will want to be ready so make sure you set what data should sync and in which direction(s) so please read the remainder of this document carefully.
2. **Account Numbering** is best practice. If you cannot rely on an exact match between the Xero Contact Names (businesses) and Accounts in CRM then use Account Numbering. Xero has a field for this. You can use any field you like in CRM but make sure you have selected the correct field to map to Xero's Account Number field (See Mapped Fields section) and make sure you have entered the Account Numbers in both systems before you start sync'ing. If you have a lot of Contacts to update in Xero, Xero has a facility to allow importing of account numbers. <https://help.xero.com/UK/ContactsAccountNumber> . You can export from CRM your Accounts (name and account number) and use Excel to create a merged file which can be imported into Xero.
3. **Decide what should be sync'd.** For example, you can sync Purchase invoices and/or Sales invoices. For instance, do you want all your purchases in Xero to be imported into your CRM Invoices module? Are you only using the integration for sync'ing Sales Invoices? Make sure you have selected the appropriate option in the config screen.
4. **Invoice Numbering.** Which system is managing this? Do you want to use Xero for Invoice Number allocation or would you prefer that the CRM generates its own sequences? If you are importing invoices from a 3rd party source into CRM then which field are you using to store the Invoice number? Don't forget to map this invoice Number field to Xero's Invoice Number field so that the CRM checks for duplicates based on this number.
5. **Inventory Sync.** When you create a new product in CRM the Item Code field checks to see if the Item Code is available in Xero. If it is already being used then the system will warn you. You can import Inventory from Xero in Admin Settings but do make sure you don't create unwanted duplicates. The Account Codes and default Tax rates can be set for each Product in CRM (For both purchases and for sales). Where the Products have been imported from Xero Inventory these fields will automatically be populated. When creating a Quote in CRM and a user picks a Product line item, the tax rate and accounting code will auto populate if these Products have these codes set up or imported.
6. **Dropdown lists.** When you import Tax rates and Account Codes etc. there may be many unwanted entries and the best thing to do is go to Dropdown Editor after the import and remove any unwanted items. This will make finding the right option easier for users.

7. **Email Invoice feature.** Before you can use the “Email Invoice” feature in CRM you will need to set up an Email Template in CRM. Whilst the PDF invoice is generated by Xero (and attached to the email) the actual email is sent from the CRM and using your CRM email credentials. It is not possible to send from Xero via CRM. Head over to the Admin Xero Settings and pick an email template that should be used for this function. Additionally, be aware that it is not possible to Email a Draft Invoice and therefore the Email button is hidden when the Invoice is in a Draft state.

Deleting Items – What you need to know

Quick2Xero does not delete data in Xero. If you delete a record (e.g. an invoice) in CRM the record will remain undeleted in Xero.

If you set the ‘Status’ of an invoice to ‘Deleted’ in CRM, a warning message will be displayed to let you know that the status will not change in Xero. We recommend that if you need to delete an invoice then delete it in Xero. Not in CRM. Xero will update CRM and set the status in CRM to deleted.

Configuration Options

Once installed go to Admin and click on the **Quick2Xero Settings** icon

Advanced OpenAdmin

| | | | |
|--------------|---|----------------|--|
| AOS Settings | Change settings for Advanced OpenSales | AOD Settings | Change settings for Advanced OpenDiscovery |
| AOP Settings | Change settings for Advanced OpenPortal | Business hours | Change the business hours |

Bugs
Maintain a list of releases for your product. Active releases are displayed in the Releases drop-down menus in bug records created within the Bugs module.

| | |
|----------|------------------------------|
| Releases | Manage releases and versions |
|----------|------------------------------|

FibreCRM Modules

| | | | |
|---------------------------|---|-------------------------------|--|
| Quick2Xero Settings | Set your Xero API and other required credentials. | Quick2Call Configuration | Quick2Call License Add-on |
| Quick2Call Settings | Configure Quick2Call Module Show/Hide | Companies House Configuration | Companies House License Add-on |
| Companies House API | Configure Companies House API Key | Superuser Access License | Superuser Access License Add-on |
| Restrict access admin | Restrict access other admin users | Web Dashlet Variables | Pass variable's to web dashlets |
| Campaign Monitor Settings | Campaign Monitor Settings | FI KPI Reports Settings | Configure KPI Report Dashboard |
| Quick2List license | Configure Quick2List module license setting | Quick2Email Settings | Configure Quick2Email Module Show/Hide |
| Quick2Email Configuration | Manage and configure the license for this add-on | | |

Sync. Settings Fields Map Codes Import Accounts Import Inventory Import Invoice List Import API License Key

Use the TABS to configure different sync options.

Sync. Settings

Use the sync. Settings TAB to switch on/off the sync. After the installation of Quick2Xero the sync will be switched off. Do not switch it on until you have chosen what should sync.

You can switch the sync'ing off and back on at any time. For instance if you need to upgrade CRM or Xero is offline for a time.

Sync. Settings Fields Map Codes Import Accounts Import Inventory Import Invoice List Import API License Key

Set what items should sync between CRM and Xero.

☒ **Enable Sync with Xero** ☐ **Disable Sync with Xero**

Sync CRM Invoices to Xero All Sales ▼

Sync Xero Invoices to CRM All CRM-Generated Invoices ▼

☒ Sync Xero Payments and Xero Credit Notes to CRM

Save

On the Sync. Settings TAB you can specify whether Sales and/or Purchase Invoices sync and the sync direction (e.g. one-way from CRM to Xero only).

✓

Enable Sync with Xero

Dis

Sync CRM Invoices to Xero

All Sales ▼

Sync Xero Invoices to CRM

All CRM-Generated Invoices ▼

Nothing

All Sales

All Purchases

All Invoices

CRM-Generated Sales

CRM-Generated Purchases

All CRM-Generated Invoices

Save

Importing Tax Rates from Xero

API

Fields Map

Codes Import

Accounts Import

Inventory Import

Invoice List Import

License Key

Tax Rates

Click this button to Import Tax Rates from Xero. Tax Rates are used when adding product/service Line Items to Quotes and Invoices in CRM. Default Tax Rates can also be applied to Products in the CRM Product list. These Rates will be added to the CRM dropdown table called "xero_taxrate_list".

Import Tax Rates

Chart of Accounts

Your Chart of Accounts codes in Xero can be imported into CRM. Use these Codes to ensure Line Items are attributed to the correct Codes in Xero. Default Accounting Codes can also be applied to Products in the CRM Product List. These Codes will be added to the CRM dropdown table called "xero_accounting_list".

Import Account Coding

Currencies

For multi-currency Quotes and Invoices import the currencies that you have set up in Xero. These Currencies will be added to the CRM Currency list.

Import Currencies

Importing Contacts to/from Xero

API

Fields Map

Codes Import

Accounts Import

Inventory Import

Invoice List Import

License Key

Account/Contact Import

Business/Contact data stored in Xero can be imported into CRM. A Xero "Contact" will be added at Account level in CRM. If there is a person associated to the Contact in Xero then this person will be created as a Contact in CRM and linked to the related Account.

You can choose to import all data from Xero or only data that has been updated since a specific date or time period.

Data Modified Since ▼

Today ▼

Import

Importing Inventory to/from Xero

API
Fields Map
Codes Import
Accounts Import
Inventory Import
Invoice List Import
License Key

Inventory

Inventory data stored in Xero can be imported into CRM. Xero "Inventory" will be added to Products in CRM. Each Inventory item in Xero has a purchase and/or sales price, accounting code and tax rate. This information is imported into CRM. You can choose to import all data from Xero or only data that has been updated since a specific date or time period.

Data Modified Since ▼

Today ▼
Import

Using Xero's Tracking Fields

Optionally you can switch on/off Tracking fields. Xero uses Tracking fields (https://help.xero.com/uk/Settings_Tracking) and CRM can be configured to use Tracking.

Switch this option on in Admin > Quick2Xero.

API
Fields Map
Codes Import
Accounts Import
Inventory Import
Invoice List Import
License Key

Invoice Import

Existing Invoices stored in Xero can be imported into CRM. If the Account and Contact do not exist in CRM they will be created during the import. You can choose to import all data from Xero or only data that has been updated since a specific date or time period.

Data Modified Since ▼

Today ▼
Import

Tracking Categories

Set up tracking categories to see how different areas of your business are performing (such as departments, cost centres, or locations). This way, your reports help you make proactive business decisions.

Enable Tracking Categories at Invoice ☒ Save

Invoice Numbering Options

Invoice Numbering

Choose which system (CRM or Xero) is responsible for invoice number generation. If you choose Xero then any Invoice generated by CRM will request an invoice number from Xero using Xeros numbering sequence. If you want to use the CRM invoice number system or use a custom numbering system then choose the "CRM" option. If you choose the CRM option you can specify which field in the CRM should be used for invoice number generation. Useful if you are importing invoices into CRM from another invoicing system. Just enter the custom field name here (e.g. myinvoicenumber_c)

Xero ▼

Default Email Template

The list opposite contains your predefined CRM Email Templates. Set which Email Template to use when sending invoices from CRM. You cannot use Xero's default email templates from CRM.

Xero Invoice Email ▼

Save

User Guide

Converting Quotes to Invoices

With the Quote on screen, click on the “Convert to Invoice” button.

[Home](#)
[Accounts](#)
[Contacts](#)
[Leads](#)
[Target Lists](#)
[Services](#)
[Calls](#)
[Meetings](#)
[Calendar](#)
[Quotes](#)
[More »](#)

Bob Smart

Pickwick Paper Mills Limited - 16★

[Edit](#)
[Duplicate](#)
[Delete](#)
[Print as PDF](#)
[Email PDF](#)
[Email Quotation](#)
[Create Opportunity](#)
[Create Contract](#)
[Convert to Invoice](#)
(1 of 14)

[Overview](#)

| | | | |
|------------------|---|--------------|-----------|
| Quote Number: | 16 | Quote Stage: | Draft |
| Account: | Pickwick Paper Mills Limited | Opportunity: | |
| Contact: | Anne Betty Robbins | Assigned to: | Bob Smart |
| Billing Address: | Ream House 42 Charles Dickens Street London W14 2AF | | |

Line Items

Currency: GB Pounds Xero LineAmountTypes: Tax Exclusive

| | Item Code | Product Description | Quantity | Unit Price | Disc % | Account | Tax Rate | Region | Total |
|-------------|-----------|-----------------------------|----------|------------|--------|-------------|------------|----------|-----------|
| Line Items: | 1 | PAY100 Payroll Express | 1 | £500.00 | - | 200 - Sales | No VAT(0%) | North | £500.00 |
| | 2 | BOO900 Bookkeeping Services | 1 | £2,500.00 | - | 200 - Sales | No VAT(0%) | Westside | £2,500.00 |

| | |
|--------------|----------|
| Subtotal: | 3,000.00 |
| Tax: | 0.00 |
| Grand Total: | 3,000.00 |

Contracts

[Create](#)
[Select](#)
(0 - 0 of 0)

| Contract Title | Account | Contract Value | Status | Contract Manager |
|----------------|---------|----------------|--------|------------------|
| No Data | | | | |

The details of the quote will be copied and an invoice in CRM (Advanced OpenSales) Invoice Module will created (in Edit mode).

Home Accounts Contacts Leads Target Lists Services Calls Meetings Calendar **Invoices** More » Bob Smart

» **Edit**

Save Cancel

OVERVIEW Status

Account: Pickwick Paper Mills Lim Due Date:

Contact: Anne Betty Robbins Xero Type: Sales

Status: Draft Xero Reference:

Assigned to: Draft Awaiting Approval Awaiting Payment (Approved) Deleted

Billing Address

Billing Street: Ream House 42 Charles Dickens Street

Billing City: London

Billing State:

Billing Postal Code: W14 2AF

Billing Country:

Line Items

Currency: GB Pounds : £ Xero LineAmountTypes: Tax Exclusive

| Item Code | Product Description | Quantity | Unit Price | Disc % | Account / Tax Rate |
|---|----------------------|----------|------------|--------|--------------------|
| PAY100 | Payroll Express | 1 | 500.00 | 0.00 | 200 - Sales |
| Payroll is a critical business operations function performed by your accounting team. Payroll involves managing all employee | | | | | No VAT(0%) |
| BOO900 | Bookkeeping Services | 1 | 2,500.00 | 0.00 | 200 - Sales |
| Bookkeeping is the most basic of all accounting functions. Bookkeeping involves maintaining accurate and updated records of all of your | | | | | No VAT(0%) |

Add additional information that might be required for Xero. For example the Due Date for payment of the invoice.

You will need to specify whether the Invoice is a SALES or PURCHASE invoice.

Creating an Invoice

When you save the invoice the invoice will be created in Xero. If the Account does not exist in Xero then that too will be created in Xero as a Contact.

FibreCRM Test Stephen Roy

Dashboard Accounts Payroll Reports Contacts Settings

Sales > Invoices > **Edit Invoice INV-0009**

i It is recommended that you add [your organisation contact details](#) before sending invoices.

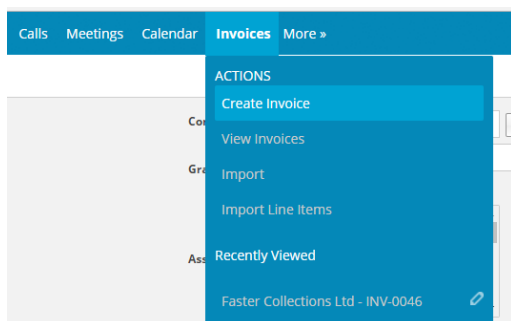
Draft Preview Email Print PDF Invoice Options

To: Pickwick Paper ... Date: 5 Oct 2017 Due Date: 28 Feb 2018 Invoice #: INV-0009 Reference:

GBP British Pound Amounts are Tax Exclusive

| Item | Description | Qty | Unit Price | Disc % | Account | Tax Rate | Region | Amount GBP |
|------------------------------|---|------|------------|--------|-------------|----------|----------|------------|
| PAY100: Payroll Express | Payroll is a critical business operations function performed by your accounting team. Payroll involves managing all employee compensation, benefits, and withholdings. We manage your payroll on an ongoing basis, ensuring that all employees are compensated according to their employment agreements and benefit selections. | 1.00 | 500.00 | 0.00 | 200 - Sales | No VAT | North | 500.00 |
| BOO900: Bookkeeping Services | Bookkeeping is the most basic of all accounting functions. Bookkeeping involves maintaining accurate and updated records of all of your company's financial activity. This includes bank records, tax filings, payroll records, purchase and sale records, and regulatory filings. These records | 1.00 | 2,500.00 | 0.00 | 200 - Sales | No VAT | Westside | 2,500.00 |

Another way to create an invoice is via the Invoice Menu



Printing and Emailing Invoices

Click on the Send Email link next to the Invoice number to send a copy of the Invoice to the customer. This action will do two things.

1. Creates a PDF file (using Xero)
2. Attaches the PDF to an Email Template (using CRM's Email Template)

The email will be sent to the customer. You won't have an opportunity to edit the email before it goes.

To set which Email Template is used for sending go to Admin > Quick2Xero Settings and configure which Email Template to use. To Edit the Email Template go to Email > View Email Templates and open the particular Email Template.

You can DOWNLOAD the PDF file using the “download” link next to the Invoice Number.

INV-0005 ☆

Edit Duplicate Delete Print as PDF Email PDF Email Invoice
(10 of 28)

OVERVIEW Status

| | | | |
|------------------|---|---------------------|--|
| Account: | Quality Electronics Limited | Due Date: | 31/10/2017 |
| Contact: | | Xero Type: | Sales |
| Status: | Awaiting Payment (Approved) | Xero Reference: | REF3400 |
| Assigned to: | Bob Smart | Xero InvoiceNumber: | INV-0005 - <a>Send Email - <a>Download |
| Billing Address: | Unit 4 Highfield Business Park Reading Berkshire RG4 2QE United Kingdom | | |

Line Items

Currency: GB Pounds Xero LineAmountTypes: Tax Exclusive

| | Item Code | Product Description | Quantity | Unit Price | Disc % | Account | Tax Rate | Region | Total |
|-------------|-----------|---------------------|---------------------|------------|-----------|---------------|--------------------------|----------|-----------|
| Line Items: | 1 | PAY100 | Payroll Express | 1 | £500.00 | - 200 - Sales | 20% (VAT on Income)(20%) | Eastside | £500.00 |
| | 2 | BOO900 | Bookeeping Services | 1 | £2,500.00 | - 200 - Sales | 20% (VAT on Income)(20%) | | £2,500.00 |
| | 3 | ks1234 | Partner Rate | 1 | £440.00 | - 200 - Sales | 20% (VAT on Income)(20%) | | £440.00 |

Creating Invoices through CRM via 3rd Party Apps

There are various ways to add Invoices into CRM and the most popular methods are using either SOAP, REST, CSV IMPORT or direct database update.

The FibreCRM professional services team can work with you to help understand your own particular requirements in this regard.

In order that these imported invoices are synchronised to Xero during the import (or subsequently) you need to update a checkbox field called `updated_via_etl`.

The scheduler will scan the database for any invoices that have this checkbox ticked. When one is found the invoice will be created in Xero and the checkbox will become unticked once the synchronisation is complete.

Schedulers

The scheduler is used to run periodic checks on the database and perform actions when necessary.

Scheduler Name

CRM to Xero

Xero Contact to CRM Account

Xero Inventory to CRM Product

Xero Invoice to CRM Invoice

Xero Update via ETL

Technical Information

Fields Created

As part of the installation process the following fields will be created in your CRM

contacts

'oepl_xero_contactid'
'oepl_xero_phone_work_cou'
'oepl_xero_phone_work_area'
'oepl_xero_phone_mobile_cou'
'oepl_xero_phone_mobile_area'

aos_invoices

'oepl_xero_expectedpaymentdate'
'oepl_xero_plannedpaymentdate'
'oepl_xero_lineamounttypes'
'oepl_xero_currencycode'
'oepl_xero_type'
'oepl_xero_invoiceid'
'oepl_xero_invoicenummer'
'oepl_xero_reference'
'oepl_xero_amountdue'
'oepl_xero_amountpaid'
'oepl_xero_fullypaidondate'
'oepl_xero_amountcredited'
'oepl_xero_sentocontact'
'oepl_xero_currencyrate'
'oepl_xero_response'
'updated_via_etl'

accounts

'oepl_xero_contactid'
'oepl_xero_accountnumber'
'oepl_xero_contactstatus'
'oepl_xero_skype'
'oepl_xero_taxnumber'
'oepl_xero_salestax'
'oepl_xero_purtax'
'oepl_xero_poattention'
'oepl_xero_streetattention'
'oepl_xero_issupplier'
'oepl_xero_iscustomer'
'oepl_xero_currency'
'oepl_xero_discount'
'oepl_xero_puraccountcode'
'oepl_xero_salesaccountcode'
'oepl_xero_bankaccountnumber'
'oepl_xero_bankaccountname'
'oepl_xero_bankdetails'
'oepl_xero_billiday'
'oepl_xero_billstype'
'oepl_xero_salesday'
'oepl_xero_salestype'
'oepl_xero_phone_office_cou'
'oepl_xero_phone_office_area'
'oepl_xero_phone_fax_cou'
'oepl_xero_phone_fax_area'
'oepl_xero_re_outstanding'
'oepl_xero_re_overdue'
'oepl_xero_pay_outstanding'
'oepl_xero_pay_overdue'
'xero_primary_contact_id'
'oepl_xero_response'

aos_quotes

'oepl_xero_type'
'oepl_xero_lineamounttypes'
'invoicenummer_1'

aos_products_quotes

'oepl_xero_accountcode'

aos_products

'oepl_xero_itemid'
'oepl_xero_isplayed'
'oepl_xero_puracc'
'oepl_xero_puraccog'
'oepl_xero_purtax'
'oepl_xero_pur_description'
'oepl_xero_issold'
'oepl_xero_salesacc'
'oepl_xero_salestax'
'oepl_xero_istrackedasinventory'
'oepl_xero_inventoryassetacc'
'oepl_xero_inventoryassetcost'
'oepl_xero_inventoryassetqty'
'oepl_xero_response'

Mapping fields

API
Fields Map
Codes Import
Accounts Import
Inventory Import
Invoice List Import
License Key

Map Xero Contact fields with either Accounts or Contacts. Each Xero contact field must be mapped with either an Account or Contact field.

| Sync | Xero Field Name | Account | Contact |
|-------------|---|---|----------------------------------|
| | Account Number (Textbox) | <input checked="" type="radio"/> Xero Account Number ▼ | <input type="radio"/> --None-- ▼ |
| | Contact (Textbox) | <input checked="" type="radio"/> Name ▼ | <input type="radio"/> --None-- ▼ |
| | Skype Name/Number (Textbox) | <input checked="" type="radio"/> Xero Skype Name/Number ▼ | <input type="radio"/> --None-- ▼ |
| | Tax ID Number (Textbox) | <input checked="" type="radio"/> Xero Tax ID Number ▼ | <input type="radio"/> --None-- ▼ |
| | Sales Tax (Dropdown) | <input checked="" type="radio"/> Xero Sales Tax ▼ | <input type="radio"/> --None-- ▼ |
| | Purchases Tax (Dropdown) | <input checked="" type="radio"/> Xero Purchases Tax ▼ | <input type="radio"/> --None-- ▼ |
| | POBOX_Attention (Textbox) | <input checked="" type="radio"/> Xero POX AttentionTo ▼ | <input type="radio"/> --None-- ▼ |
| | POBOX_Street Address or PO Box (Textbox) | <input checked="" type="radio"/> Billing Street ▼ | <input type="radio"/> --None-- ▼ |
| | POBOX_Town / City (Textbox) | <input checked="" type="radio"/> Billing City ▼ | <input type="radio"/> --None-- ▼ |
| | POBOX_State / Region (Textbox) | <input checked="" type="radio"/> Billing State ▼ | <input type="radio"/> --None-- ▼ |
| Sync | Xero Field Name | Account | Contact |
| | POBOX_Postal / Zip Code (Textbox) | <input checked="" type="radio"/> Billing Postal Code ▼ | <input type="radio"/> --None-- ▼ |
| | POBOX_Country (Textbox) | <input checked="" type="radio"/> Billing Country ▼ | <input type="radio"/> --None-- ▼ |
| | STREET_Attention (Textbox) | <input checked="" type="radio"/> Xero AttentionTo ▼ | <input type="radio"/> --None-- ▼ |

Frequently Asked Questions (FAQ)

How does Quick2Xero check for duplicates? We already have a lot of customers recorded in Xero as well as in CRM. Will they get duplicated when we connect?

Quick2Xero does two checks. First it checks the Xero Account Number field and looks for this account number in CRM (it checks in the field you have mapped so make sure you have configured this field in "Mapped Fields"). If an account number is not found it will then check the Contact Name field.

How have invoices which have been created outside of CRM and Xero. Can these be imported into CRM and transferred to Xero?

Yes. You can import invoices. There is a checkbox field added during this installation called "update_via_etl". If you tick this checkbox during import the scheduler will look for invoices that have this checkbox ticked and process them into Xero. Once processed the scheduler will remove the tick. This is useful if you have a regular process for importing invoices into CRM from an external source (e.g. a daily import of invoices from IRIS Time & Fees).

If payments are processed in Xero will these show in CRM?

Yes, all payments are listed when you view an Invoice (See the Xero Payments subpanel). Additionally the invoice itself shows the amount due, overdue and amount paid to date.

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