

User Manual



SFX — Salesforce Xero connector

- Automate your business, A solution that will reduce time
- Invoice/Bills/Credit Note automatically created in Xero
- Manage Pre-Payments
- Pre-payment
- Two-way Synchronization
- Multi-Xero Org and Multi-Currency
- Batch invoicing

Let's get started...

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Document Version

#	Version No.	Date	Notes
1	1.0	8-Feb-2017	Basic SFX Connector
2	1.1	4-Jul-2017	Process Builder
3	1.2	21-Jun-2019	Sync Invoices
4	1.3	16-Jul-2019	Multi-Currency and Multi-Org
5	1.4	28-Jan-2020	Xero API upgrades
6	1.5	13-Apr-2020	Enhancements
7	1.6	11-May-2020	Invoice from Custom Object
8	1.7	29-July-2020	Multiple Invoices on existing object on selected line items
9	1.8	21-Sep-2020	Pre-payment
10	1.9	7-June-2021	- Account shipping address mapping to Xero Delivery address - Tracking categories
11	2.0	25-Sep-2021	Batch Invoicing
12	2.1	1-Oct-2021	Purchase Order & Projects creation

1. Overview

Automate your business: A solution that will reduce time, creating a invoice from opportunity or a Invoice without opportunity, integrated payment gateway with (eWAY), instant sync with Xero.

- Invoice automatically created in Xero as draft, facility to submit as approved
- Integrated eWAY Payment gateway
- Online Payments (Partial / full) recorded both in Salesforce.com and Xero.
- Generate invoice from an opportunity in Salesforce.
- Auto Invoice creation using Process builder.
- Use Xero Invoice branding to generate invoice.
- Invoice automatically created in Xero as draft.
- A PDF format of Invoice created and stored in salesforce.com.
- Option to email Invoice.
- Email task recorded as Task in salesforce.com.
- Approve Invoice option of Xero directly managed within Salesforce.com.
- Integrated eWAY Payment gateway.
- Online Payments (Partial / full) recorded both in Salesforce.com and Xero.
- Reports & Dashboards.

Appexchange Link to install SFX:

<https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000EODsjUAH>

2. SFX requirement's

1. Salesforce – all versions
2. Xero – all editions
3. eWay (optional)

3. How to install SFX

Go to SFX Product page in the Appexchange.

<https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000EODsjUAH>

The screenshot shows the Salesforce AppExchange interface. At the top, there's a navigation bar with 'salesforce appexchange' and tabs for 'Apps', 'Components', and 'Consultants'. A search bar and 'Log In' link are on the right. The main banner for the 'SFX' app features a green background with icons for a document, a leaf, and a building, connected by dashed lines. Text on the banner reads: 'Track Sales with instant payments and accounting entries', 'Creating a difference to your Sales team', and 'Salesforce - Xero integration made easy'. Below the banner, the app is listed as 'SFX - Salesforce Xero integration made easy' with a description: 'Track Sales & Invoice with instant payments and accounting entries'. It has a rating of '***** (No Rating)' and is marked as 'Free - Details below'. Navigation tabs include 'OVERVIEW', 'DETAILS', 'REVIEWS', and 'PROVIDER'. On the right, there are 'Save' and 'Get It Now' buttons, with a red arrow pointing to the 'Get It Now' button. Below the tabs, it says 'App by Riverdale Cloud Pty Ltd' and provides a description: 'Automate your business: A solution that will reduce time, creating a invoice from opportunity or a Invoice without opportunity, integrated payment gateway with (eWAY), instant sync with Xero.'

Click “Get It Now”

Follow options to “Login to AppExchange”

 APP

 Professional & Up

 No Limits

SFX - Salesforce Xero integration made easy

Track Sales & Invoice with instant payments and accounting entries

★★★★★ (No Rating)

Free - *Details below*

OVERVIEW DETAILS REVIEWS PROVIDER

♥ Save

➔ Get It Now

To get this app, select one of the below options

Log in to the AppExchange
Use your Salesforce credentials

I don't have a login
Continue as a guest

Even if you plan to install into your sandbox, first login to the AppExchange using your production credentials.

Choose to “Install in production” or “Install in sandbox”

SFX - Salesforce Xero integration made easy

Track Sales & Invoice with instant payments and accounting entries

★★★★★ (No Rating)

Free - *Details below*

OVERVIEW DETAILS REVIEWS PROVIDER

♥ Save

➔ Get It Now

How would you like to continue?

 **Install in production**
Includes active, trial or developer orgs

 **Install in Sandbox**
Test in a copy of your production org

Read and Check “I have read and agree to the terms and conditions”, click Confirm and Install

Almost there!



salesforce.com, inc. is not the provider of this application and has not conducted any review of it, security or otherwise. Please [click here](#) to understand what this means with respect to Salesforce's security and trust obligations.

WHAT YOU ARE INSTALLING

PACKAGE

SFX - Salesforce Xero integration made easy

VERSION

SFX (SFX / 1.23.0)

SUBSCRIPTION

Free

DURATION

Does Not Expire

NUMBER OF SUBSCRIBERS

Site-wide

WHERE YOU ARE INSTALLING

ORGANIZATION

Riverdale Cloud Pty Ltd

EDITION

Developer

USER NAME

john1@riverdalecloud.com

☒ I have read and agree to the [terms and conditions](#).[Cancel Install](#) | [Back to previous step](#)

Confirm and Install!

Login to your salesforce org, select the users and click on <Install>



Install SFX

By Riverdale Cloud Pty Ltd

☐ Install for Admins Only☒ Install for All Users☐ Install for Specific Profiles...

Install

Cancel

App Name

SFX

Publisher

Riverdale Cloud Pty Ltd

Version Name

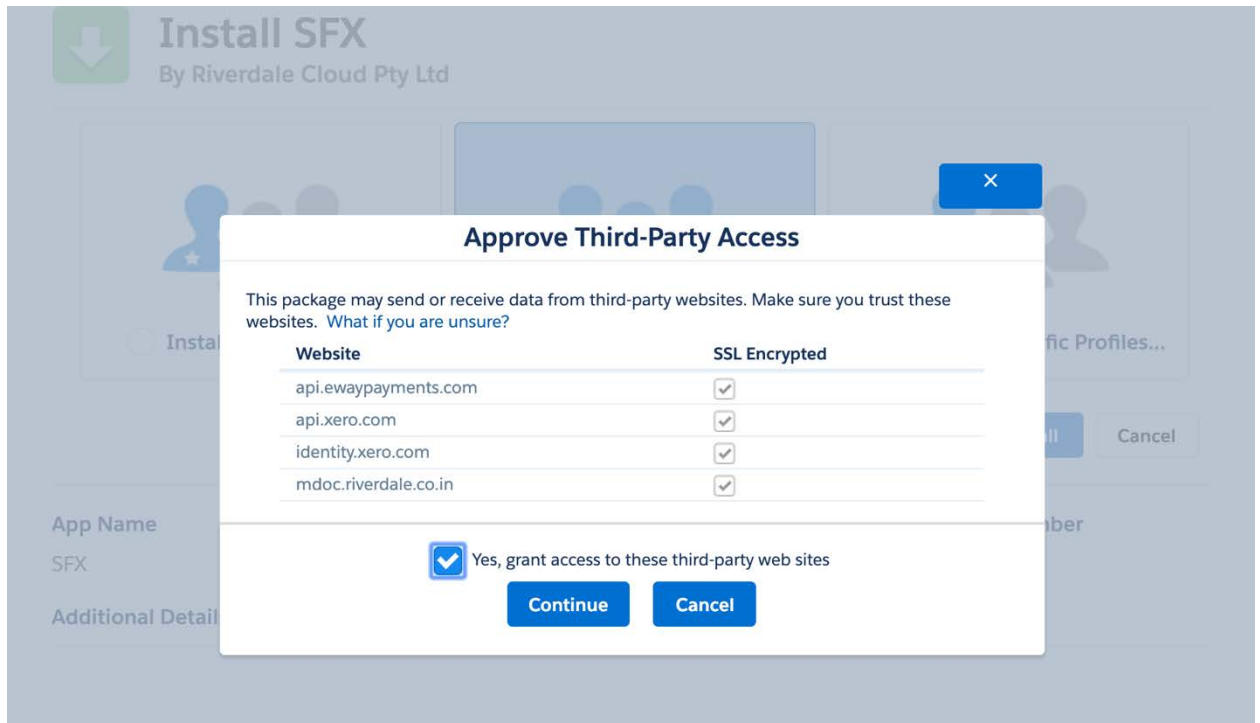
SFX-1.55

Version Number

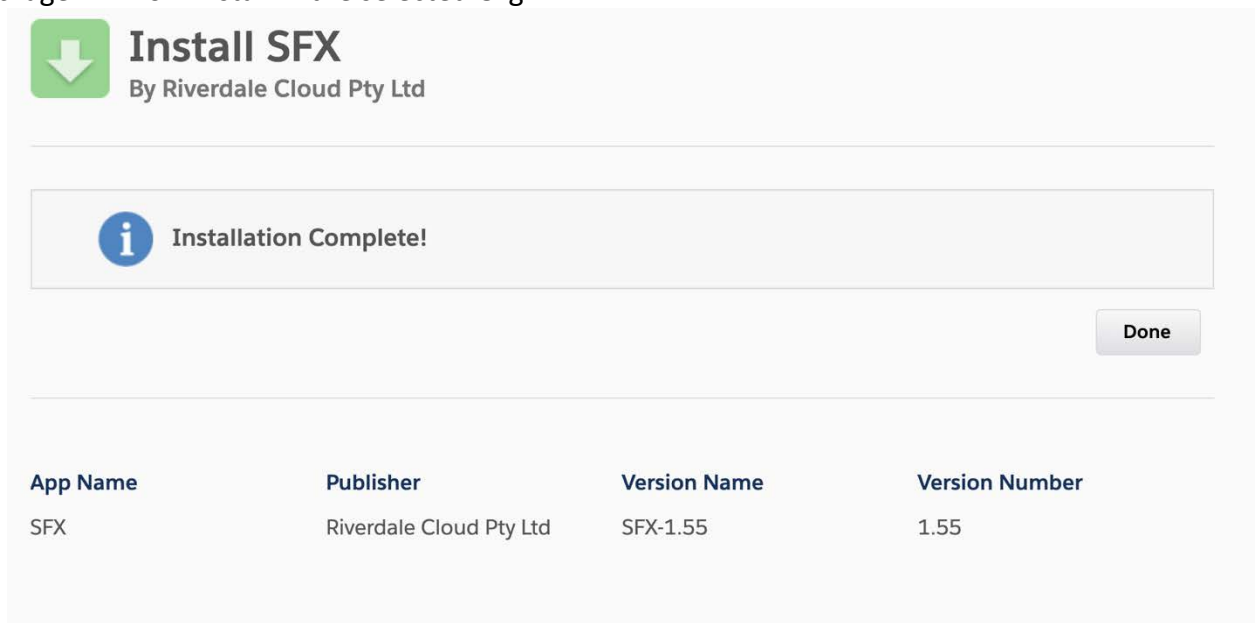
1.55

[Additional Details](#)[View Components](#)

Select the SSL encryption and grant access for eWAY Payment gateway, Xero and SFX connector.



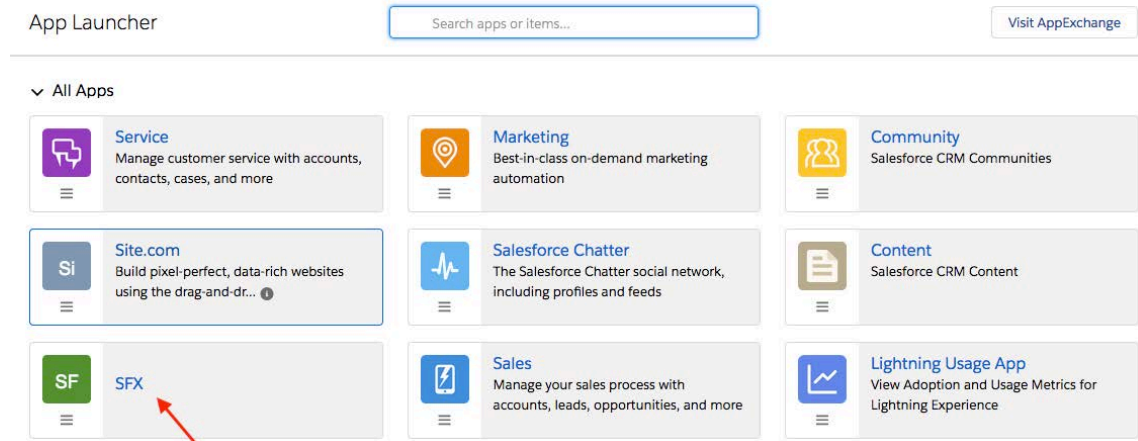
SFX package will now install in the selected Org.



4. SFX Activation

- Click on App Launcher
- Select "SFX" App

SFX app can be selected from app launcher



Update details under the setup tab followed by clicking on <Activate Installation> to complete SFX activation.

The screenshot shows the Salesforce Setup & Configuration page. At the top, there is a "Setup & Configuration" header with a gear icon. Below the header, there is a red button labeled "Click to download the user manual". The page displays the following information: Org ID (00D90000788ZDCEAA), Organisation Name (Riverdale Cloud Pty Ltd), and a list of fields for address and contact information: Street, City, State, Country, PostalCode, Contact Name, Contact Email, and Contact Phone. At the bottom, there is a blue button labeled "Activate Installation".

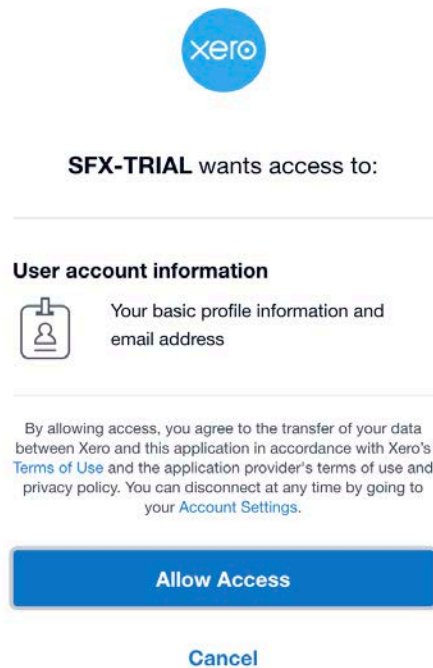
The screenshot shows the Salesforce SFX interface. At the top, there's a navigation bar with the SFX logo and various menu items: Home, SFX Setup, Accounts, Contacts, Opportunities, Invoices/Bills, Products, Reports, Create Invoice/Bills, Xero Tax/Branding, and SFX Logs. A search bar is also present. Below the navigation bar, a red banner says "Click to download the user manual". The main content area has a blue header with the SFX logo and a message: "Your fully-featured 14-day free trial is now active. 11 day/s are remaining for your trial period to expire". Below this, it says "You have generated total 1 invoice/s in this month." and a "Click to Subscribe" button. The "Setup & Configuration" section shows the Org ID (00D2v0000) and Organisation Name (Cloud Riverdale), with a "Connect to Xero" button. The "Xero Multi Org Setup" section shows a table with columns: No., Connected Xero Org, Select/Change Xero Org, Active, Sync, Org Unique Id, and Remove. There are "Add Org" and "Save" buttons. The "Sync Invoices" section has "Sync Xero Invoices" and "Sync Configuration" buttons.

SFX is now activated

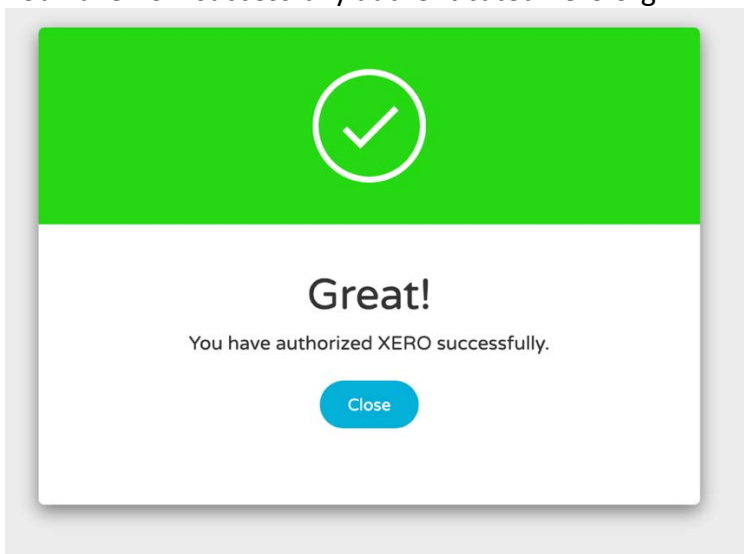
Click on the button <connect XERO>
Upon clicking, you will be re-directed to Xero login

The Xero login page features the Xero logo at the top. Below it, the text "Log in to Xero" is displayed. A message states "You're using the new Xero login experience" with a "Learn more" link. The login form consists of two input fields: "Email address" and "Password", each with a visibility toggle icon. A large blue "Log in" button is positioned below the fields. At the bottom, there are links for "Forgot password" and "Can't log in".

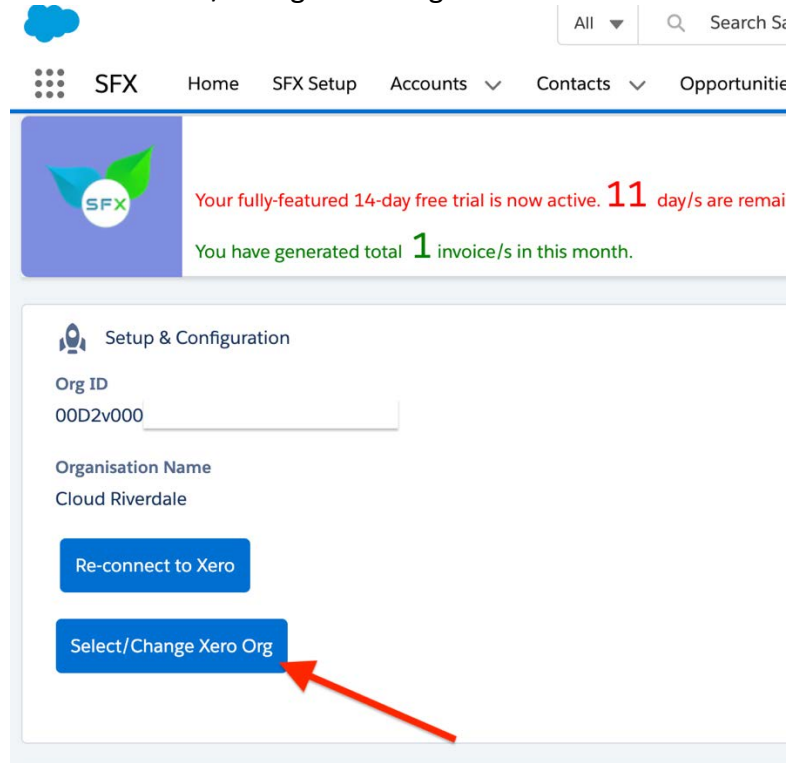
Upon successfully logging in, you will be asked to allow access followed by connect to Xero org



You have now successfully authenticated Xero org



Click on <Select/Change Xero Org>



Cloud Riverdale

Org ID
00D2v000

Organisation Name
Cloud Riverdale

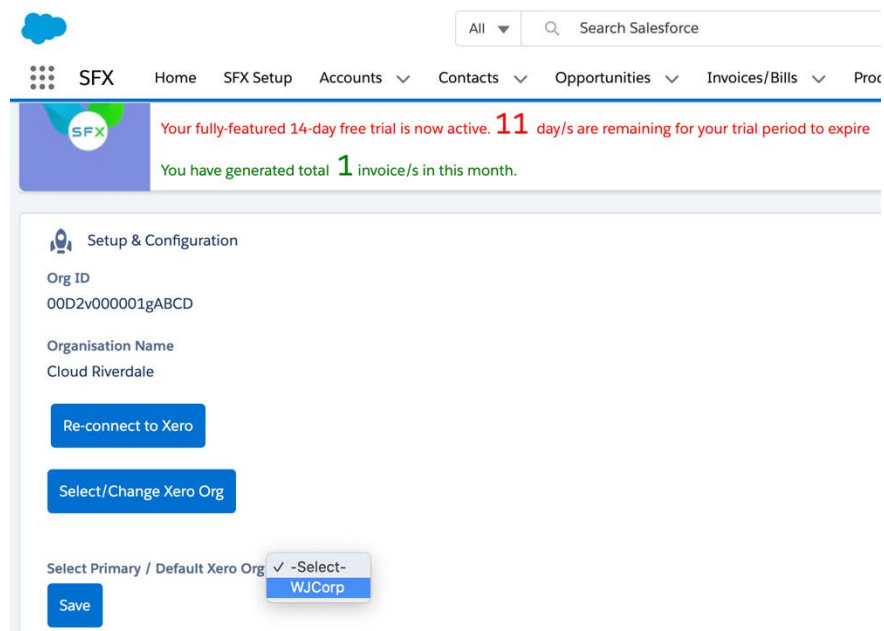
Re-connect to Xero

Select/Change Xero Org

Your fully-featured 14-day free trial is now active. **11** day/s are remaini

You have generated total **1** invoice/s in this month.

Select your Xero Org and click <Save>



Cloud Riverdale

Org ID
00D2v000001gABCD

Organisation Name
Cloud Riverdale

Re-connect to Xero

Select/Change Xero Org

Select Primary / Default Xero Org **✓ -Select- WJCorp**

Save

Your fully-featured 14-day free trial is now active. **11** day/s are remaining for your trial period to expire

You have generated total **1** invoice/s in this month.

You are now connected



All ▾

 SFX Home SFX Setup Accounts ▾ Contacts ▾ Opportunities ▾ Invoices/Bills ▾ Products



Your fully-featured 14-day free trial is now active. **11** day/s are remaining for your trial period to expire

You have generated total **1** invoice/s in this month.

 Setup & Configuration

Org ID

00D2v000001gomaBACD

Organisation Name

Cloud Riverdale

Re-connect to Xero

Connected Primary / Default Xero Org

WJCorp

5. SFX Configuration – Mapping standard or custom objects

Mapping Salesforce standard or custom object to Xero Invoice, Bills, Credit Note, Purchase order & Projects

Invoice from Custom Object (Xero Custom Object Mapping Mapping)

Select SFX app, click on the “Xero Custom Object Mapping”
Create a new record with the below parameters

Invoice can be generated from a **single custom object** or from an object with a child object. Child object is where your line items are stored.

To generate invoice from custom object, the objects should have the below **mandatory** fields

- Name
- Invoice/Bill Object
- SFX Invoice Lookup field (In the RDSFX Invoice object, create a lookup field to your custom object which you want to use for Invoicing)
- Invoice Account Lookup Field
- Invoice Contact Lookup Field (ensure your contact has a email id, which is mandatory to create and map invoice in Xero)
- Line Item Qty field
- Line Item Unit Price field

Ensure the above fields are existing in the respective custom object(s) and the API name used in the “Xero Custom Object Mapping” layout.

To create Invoice from **two custom objects**, a master and a child object(viz, line items object)

- If child object is used, please be sure to map the relevant API names from the child object.
- A typical child object will contain fields such as Product description, price, quantity, discount, account code and tax code.

Refer the screen shot below

Basic Mapping

* Xero Custom Object Mapping Name

Invoice/Bill Line Item Object 

* Invoice/Bill Object 

Lookup Field Lineltem to Invoice 

* SFX Invoice Lookup Field 

Invoice Create/Update 

--None-- 

SFX Invoice Lineltem Lookup Field

Xero Invoice Object Mapping

Custom Invoice/Bill Number 

Invoice Reference Field 

* Invoice Account Lookup Field 

Invoice Contact Lookup Field 

Invoice Address Mapping

--None-- 

Account Ship Addr to Xero Delivery Addr

☐

Invoice Date Field 

Invoice Due Date Field 

Xero Org Unique Id Field

Tax Exclusive/Inclusive Field 

Invoice / Bill / Credit Note 

Currency Code Field 

Invoice Status

--None-- 

Xero Branding Theme Field 

Contact Account Number 

Contact Phone 

Contact Email 

Update SF Contact to Xero

☐

Download PDF 

☐

Xero Invoice Line Item Object Mapping

Line Item Item Code Field ⓘ

Do not create invoice ⓘ

☐

Line Item Description Field ⓘ

* Line Item Quantity Field ⓘ

* Line Item UnitPrice Field

Line Item Xero Account Code ⓘ

Line Item Xero Tax Rate ⓘ

Line Item Discount Field ⓘ

Xero Tracking Category1 ⓘ

SF Tracking Category1 ⓘ

Xero Tracking Category2 ⓘ

SF Tracking Category2 ⓘ

Exclude LineItem ⓘ

A Mapping id is generated and displayed on the layout for use of Invoice creation
Shipping Address mapping to Xero Delivery Address

This feature is added in SFX version 1.82 onwards. This is available on the **Xero Custom Object mapping** screen under the section **Xero Invoice Object Mapping** as shown in the screen below. The functionality allows you to map any of the Account or Contact addresses to the delivery address in Xero

Xero Invoice Object Mapping

Custom Invoice/Bill Number ⓘ

Invoice Reference Field ⓘ

* Invoice Account Lookup Field ⓘ

* Invoice Contact Lookup Field ⓘ

Invoice Address Mapping

Account Billing Address ▼

--None--

✓ Account Billing Address

Account Shipping Address

Person Account Mailing Address

Contact Mailing Address

Account Ship Addr to Xero Delivery Addr

☐

Invoice Due Date Field ⓘ

Tax Exclusive/Inclusive Field ⓘ

Currency Code Field ⓘ

Tracking Code mapping

This feature is added in SFX version 1.82 onwards. This is available on the **Xero Custom Object mapping** screen under the section **Xero Invoice Line-Item Object Mapping** as shown in the screen below.

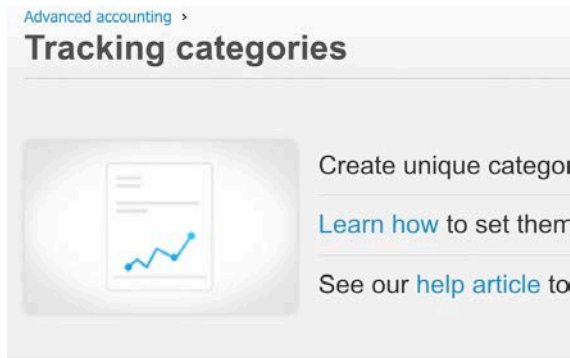
Xero Invoice Line Item Object Mapping

Line Item Item Code Field ⓘ	Line Item Description Field ⓘ
	Description
* Line Item Quantity Field ⓘ	* Line Item UnitPrice Field
Quantity	UnitPrice
Line Item Xero Account Code ⓘ	Line Item Xero Tax Rate ⓘ
RDSFX__Account_Code__c	RDSFX__Xero_Tax_Rate__c
Line Item Discount Field ⓘ	
Xero Tracking Category1 ⓘ ↺	SF Tracking Category1 ⓘ ↺
Tracking1	SFTracking1__c
Xero Tracking Category2 ⓘ ↺	SF Tracking Category2 ⓘ
Tracking2	

The functionality allows you to map the Tracking code created in Xero to the tracking code (custom field) field created on the Invoice header object. On the left column enter the tracking category field as it was created in Xero. On the right-hand column enter the field API name of the Tracking field created on the Invoice header object.

How to create a Tracking category in Xero?

Click on the Accounting menu in Xero, click on Advanced menu item, the following page will display an option “Tracking categories”. Click on the “Tracking categories” option to create your own tracking categories.



What's this?

[+ Add Tracking Category](#)

Tracking1 [Tracking2](#)

Tracking category name

Tracking1 [✕](#) [Rename](#)

Category options

1 [✕](#) [Rename](#)

2 [✕](#) [Rename](#)

3 [✕](#) [Rename](#)

[+ Add another option](#)

Once the tracking categories are mapped, the tracking categories appear on the “Create Invoice” screen under the line items section.

Line Item Details

AUD Australian 1

Tax Exclusive

Remove	Item	Description	Quantity	Unit Price	Accounts	Discount Rate(%)	Tax Rate	Tracking1	Tracking2
✕	--No--				(REVENUE) 200-Sales		GST on Income	--None--	--None--
✕	--No--				(REVENUE) 200-Sales		GST on Income	--None--	--None--
✕	--No--				(REVENUE) 200-Sales		GST on Income	1	--None--

[Add Row](#)

[Save](#) [Cancel](#)

Creating “New Invoice” button from Standard/Custom Object

Go to the custom object nominated as your Invoice Master from the setup

Select the object

Go to <Buttons, Links and Actions>

Select <New Button or Link>

Give a label name <New Invoice>

Select the option <Detail page button>

In the formula section, enter the below function with parameters

/apex/RDSFX__InvoicePage?mappingid=<mappingID>&recordid={!<CustomObject.Id>

Ex: /apex/RDSFX__InvoicePage?mappingid=a0S0o00001Ihu7M&recordid={!Energy_Audit__c.Id}

Ensure the characters <, >, and any space in-between the formula is removed

For the mapping id refer Mapping section

NOTE: Ensure there is no extra spaces in-between the formula

SETUP > OBJECT MANAGER
energy audit

Edit energy audit Custom Button or Link
New Invoice

Custom Button or Link Edit [Save] [Quick Save] [Preview] [Cancel]

Label: New Invoice
Name: New_Invoice
Description:
Display Type:
Detail Page Link View example
Detail Page Button View example
List Button View example
Behavior: Display in new window View Behavior Options
Content Source: URL

Select Field Type: energy audit Insert Field: -- Insert Merge Field -- Insert Operator:
/apex/RDSFX__InvoicePage?mappingid=a0J2w000002MUQ&recordid={!energy_audit__c.Id}

Functions: -- All Function Categories
ABS
ADDMONTHS
AND
BEGINS
BLANKVALUE
CASE
Insert Selected Function

Remember to add the <New Invoice button> on the page layout.

6. Standard Invoice button creation for Opportunity

Adding <New Invoice> button on the Opportunity page for Classic
Edit opportunity layout, drag the <New Invoice> button on to the Custom buttons area on the page, save the layout.

The screenshot displays the Salesforce Classic interface for editing the 'Opportunity Detail' layout. At the top, there is a toolbar with buttons: Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. Below this is a 'Fields' sidebar on the left with categories: Buttons, Custom Links, Quick Actions, Salesforce1 & Lightning Actions, Expanded Lookups, and Related Lists. The 'Buttons' category is selected, showing a 'Quick Find' search bar and a list of buttons: Change Owner, Edit, Submit for Approval, Change Record Type, New Invoice, Send an Email, Clone, and Sharing. A red arrow points from the 'New Invoice' button in this list to the 'Custom Buttons' area in the 'Opportunity Detail' section. The 'Opportunity Detail' section has a header 'Salesforce1 and Lightning Experience' and a sub-header 'Actions'. Below this is a description of actions and a list of buttons: Standard Buttons (Edit, Delete, Clone, Change Owner, Change Record Type, Sharing, Send an Email) and Custom Buttons (New Invoice). The 'Opportunity Detail' section also contains a table of opportunity information.

Opportunity Information (Header visible on edit only)	
Opportunity Owner	Sample User
Private	✓
★ ● Opportunity Name	Sample Opportunity Name
● Account Name	Sample Account
Type	Sample Type
Lead Source	Sample Lead Source
Amount	\$123.45
Expected Revenue	\$123.45
★ ● Close Date	7/02/2017
Next Step	Sample Next Step
★ ● Stage	Sample Stage
● Probability (%)	679%
Primary Campaign Source	Sample Campaign

Other Information (Header visible on edit only)

Adding <New Invoice> button on the Opportunity page for lightning

The screenshot shows the Salesforce Setup interface for the Opportunity object. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Page Layouts (highlighted), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and Search Layouts for Salesforce Classic. The main content area is titled 'SETUP > OBJECT MANAGER Opportunity'. It features a top bar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties' buttons. Below this is a 'Quick Find' search bar and a table of mobile actions. The table has columns for 'Mobile Action Name' and 'Mobile Action Type'. The actions listed are: Change Owner, Delete, Link, New Case, New Invoice, New Task, Question, Change Record Type, Edit, Log a Call, New Contact, New Lead, Poll, Sharing, Clone, Email, Mobile Smart Actions, New Event, New Note, Post, Submit for Approval, Clone with Related, File, New Account, New Group, New Opportunity, and Printable View. Below the table is a 'Highlights Panel' section with a 'Customize the highlights panel for this page layout...' link. This is followed by a 'Quick Actions in the Salesforce Classic' section with a 'Publisher' link and a row of buttons: Post, File, New Task, Log a Call, New Case, New Event, Link, Poll, Question, and Email. The final section is 'Salesforce Mobile and Lightning Experience' with an 'Actions' link and a row of buttons: Post, File, New Task, Log a Call, New Case, New Event, Link, Poll, Question, Email, Change Record Type, Clone, Submit for Approval, Delete, Edit, Change Owner, Sharing, and New Invoice. A red arrow points to the 'New Invoice' button in this section.

Mobile Action Name	Mobile Action Type
Change Owner	Change Owner
Delete	Delete
Link	Link
New Case	New Case
New Invoice	New Invoice
New Task	New Task
Question	Question
Change Record Type	Change Record Type
Edit	Edit
Log a Call	Log a Call
New Contact	New Contact
New Lead	New Lead
Poll	Poll
Sharing	Sharing
Clone	Clone
Email	Email
Mobile Smart Actions	Mobile Smart Actions
New Event	New Event
New Note	New Note
Post	Post
Submit for Approval	Submit for Approval
Clone with Related	Clone with Related
File	File
New Account	New Account
New Group	New Group
New Opportunity	New Opportunity
Printable View	Printable View

7. Creating a New Invoice:

New Invoice button is displayed on the Opportunity layout, this button will enable to create an Invoice

Save Cancel

INVOICE DETAILS

Invoice Number
Invoice number generated by Xero

Account

Contact

Opportunity

Invoice Date [6/19/2019]

Due Date [6/19/2019]

Status
DRAFT

Branding

Invoice Line Item Details

Remove	Description	Quantity	Unit Price	Accounts	Discount Rate(%)	Tax Rate
X				--None--		--Select--
X				--None--		--Select--

There are two options to add products to the Invoice; you could either add any product, which are not related to the opportunity line items or just Click on the button “Copy Opportunity line items”. This will copy all the products added to the related opportunity.
Note: Remember to select the correct Tax rate as defined in Xero

Invoice is generated and the same invoice is created instantly in Xero with the same invoice number.

The screenshot displays the Salesforce interface for an invoice detail page. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The main navigation menu shows options like Home, SFX Setup, Accounts, Contacts, Opportunities, Invoices (selected), Products, Reports, Create Invoice, Xero Tax/Branding, and SFX Logs. The page title is 'Invoice INV-0034'. Below the title, there are buttons for 'New Contact', 'Edit', and 'New Opportunity'. The page is divided into three main sections: 'Related', 'Details', and 'Activity'. The 'Details' section is currently active, showing a table of invoice information. The 'Activity' section on the right shows a list of activities with buttons for 'New Event', 'New Task', and 'Log a Call'. The 'Next Steps' section shows no next steps, and the 'Past Activities' section shows no past activities.

Details	
Invoice Number	INV-0034
Invoice Date	5/31/2019
Due Date	6/3/2019
Invoice Approved Date	6/3/2019 5:00 AM
Sub Total	\$768.00
Total Tax	\$0.00
Total Amount	\$768.00
Xero Link	https://go.xero.com/AccountsReceivable/Edit.aspx?invoiceID=a96756e1-5351-4acc-a1dc-3ab8b6b6951a
Reference	
Status	AUTHORISED
Account	United Oil & Gas Corp.
Contact	Arthur Song
Opportunity	
Invoice External Id	a96756e1-5351-4acc-a1dc-3ab8b6b6951a
Pending Amount	\$768.00
Invoice ID	a96756e1-5351-4acc-a1dc-3ab8b6b6951a
Branding	Standard
Branding Id	56163e2e-9212-4a88-8713-176f9bc2d080
Amount Paid	\$0.00

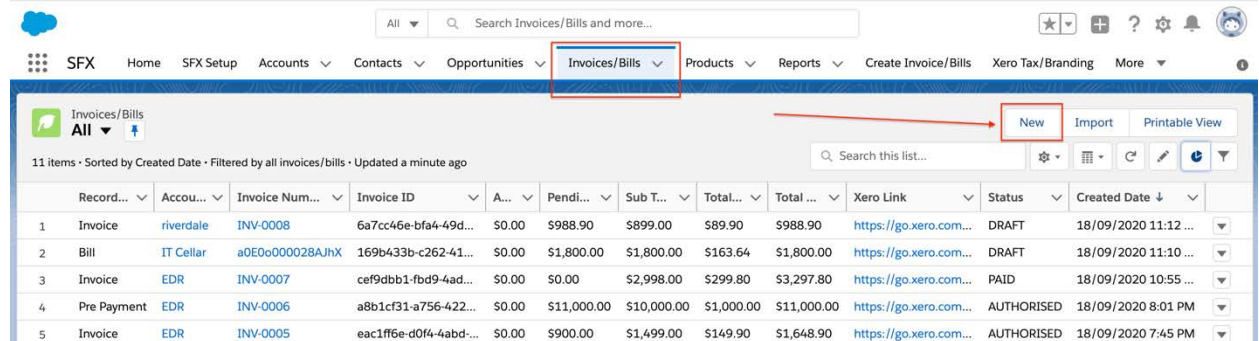
Features on Invoice Detail page:

- Generate PDF: A pdf format Invoice is generated for printing purpose, stored under notes and attachment's
- Send Invoice: Email the Invoice to the selected contact, upon generating PDF. History captured under activity history.
- Approve Xero Invoice: Enable to approve the Invoice, this changes the status of the invoice to Approved both in Salesforce and Xero. Note: Once this is done, you will be unable to edit/modify the approved invoice in XERO
- eWay PAY: This button will enable to take instant credit card payments

Alternately related list <Payments> on the Invoice object will enable you to record any Bank related transactions.

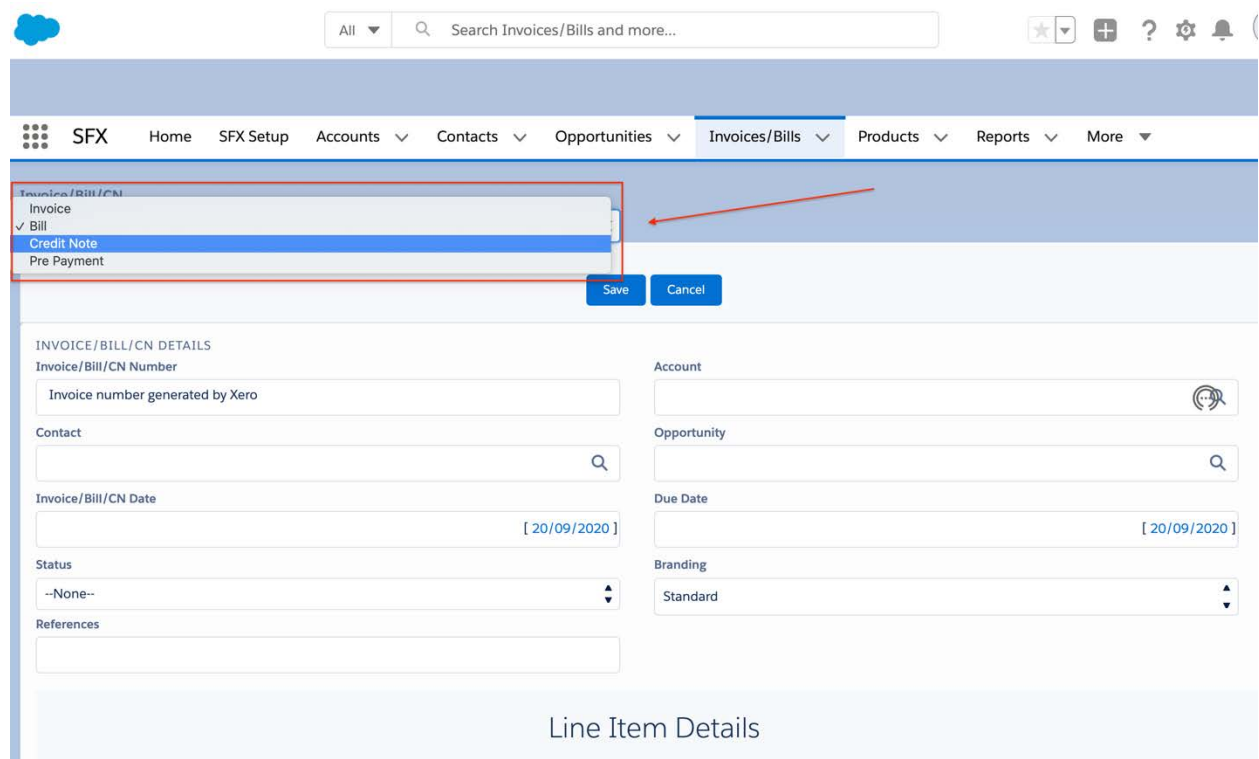
8. Creating a New Invoice / Bill / Credit Note / Pre-payment:

A new transaction such as Invoice or Bill or Credit Note can be created from the Invoice/Bills tab. Click on the tab, followed by clicking on the NEW button. Prepayment is explained in detail following this section.



The screenshot shows the Xero Invoices/Bills tab. The 'Invoices/Bills' menu item is highlighted with a red box. The 'New' button is also highlighted with a red box. Below the menu, there is a table of transactions with columns for Record, Account, Invoice Number, Invoice ID, Amount, Pending, Sub Total, Total, Xero Link, Status, and Created Date. The table contains 5 items, including Invoices, Bills, and Prepayments.

Upon clicking the <NEW> button, a new transaction screen is displayed. To create Invoice or Bill or Credit Note or Prepayment, select the required option on the top left of the screen. The screen will render based on the option selected.



The screenshot shows the 'New Invoice/Bill/CN' screen. The 'Credit Note' option is selected in the top left dropdown menu, highlighted with a red box. The form fields include: Invoice/Bill/CN Number (with a note 'Invoice number generated by Xero'), Contact, Invoice/Bill/CN Date (set to 20/09/2020), Status (set to --None--), References, Account, Opportunity, Due Date (set to 20/09/2020), and Branding (set to Standard). There are 'Save' and 'Cancel' buttons at the bottom.

Fill the required fields and remember to select the correct tax rate as defined in Xero. The selected transaction is generated and the same transaction is instantly created in Xero.

Every transaction created has a record type field that specifies the transaction viz., Bills, Invoice, Credit Note or Pre-payment.

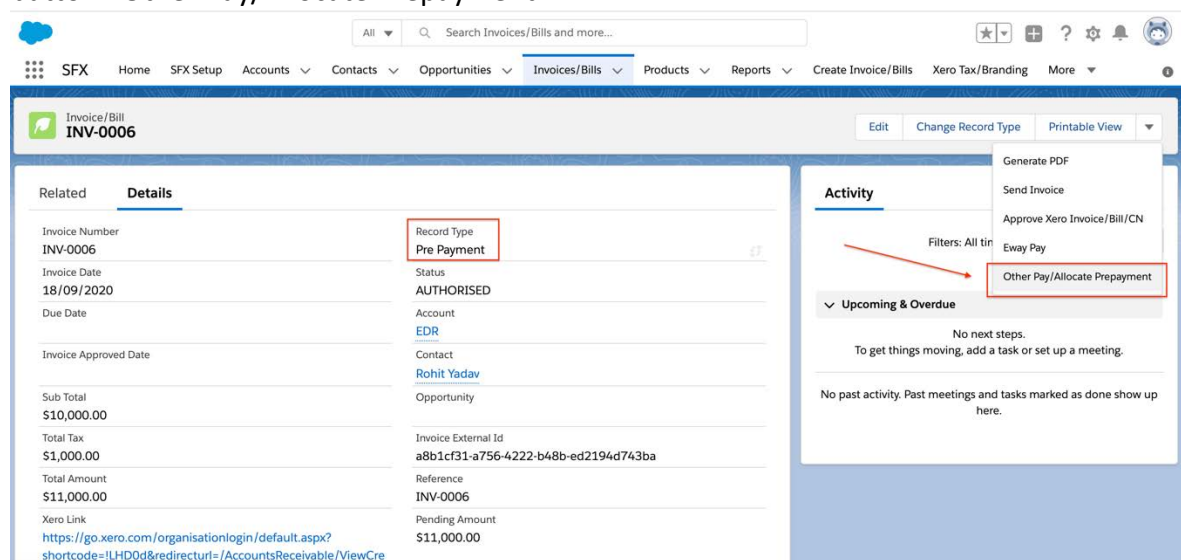
9. Creating Pre-payment:

What is pre-payment?

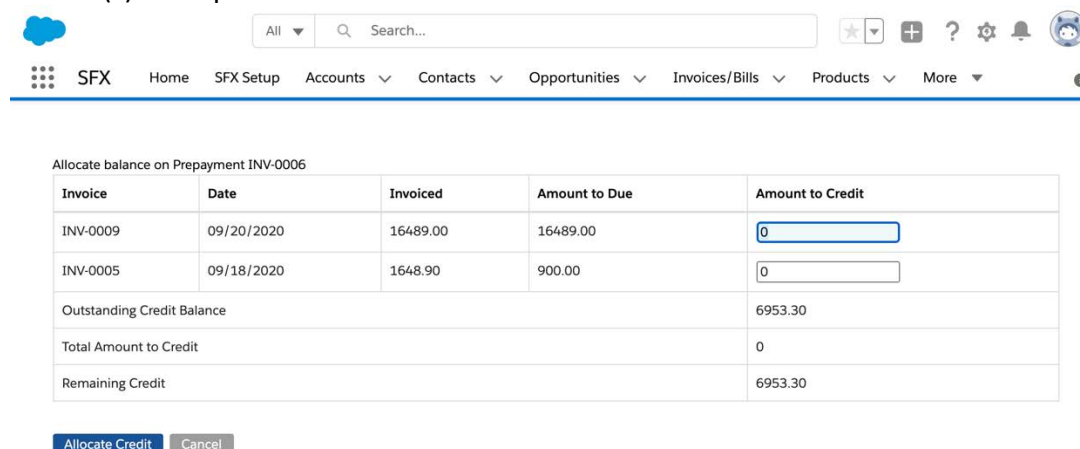
Prepayments are the payment of a bill, operating expense, or non-operating expense that settle an account before it becomes due.

A prepayment is recorded as a debit to the prepaid expenses account and a credit to the cash account. When the prepaid item is eventually consumed, a relevant expense account is debited, and the prepaid expenses account is credited.

To create a pre-payment, just click on the Invoice/Bills tab, click the <NEW> button to create a new prepayment transaction. Once this is done, on the detail page click on the button <Other Pay/Allocate Prepayment>



Upon clicking the button, the below screen is displayed with the list of authorised invoices raised on the client. This will then enable you to allocate credits to the invoice(s) as required



Invoice	Date	Invoiced	Amount to Due	Amount to Credit
INV-0009	09/20/2020	16489.00	16489.00	0
INV-0005	09/18/2020	1648.90	900.00	0
Outstanding Credit Balance				6953.30
Total Amount to Credit				0
Remaining Credit				6953.30

10. Emailing Invoice

To Email invoice, first generate pdf and then use the <Send invoice> button to send the invoice via email to the selected contacts.

Send Invoice

Send To:

Additional Email:

CC Email:

Select Template:

Send Invoice ▾

Hello {!RDSFX__Invoice__c.Name}

☒ INV-0033.pdf

Send

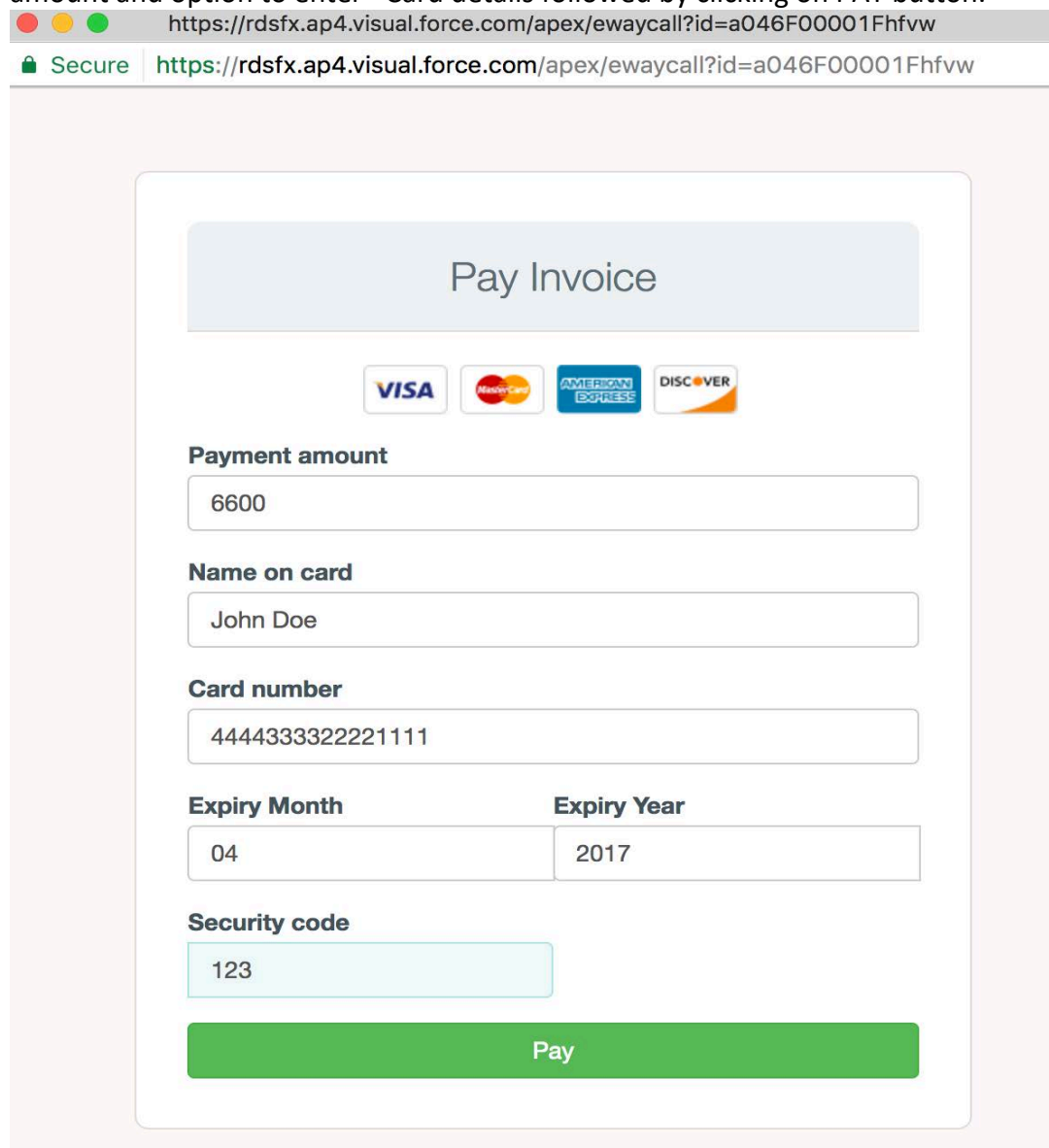
11. Existing Contact mapping from Xero to Salesforce:

Go to <Xero Tax / Branding> tab

1. Download the contact csv from Xero
2. Download contacts from Salesforce
3. Map Xero ids with Salesforce Ids
4. Bulk update the csv file in Salesforce

12.Payment processing via eWay

Click on eWay Pay button. This will open a pop-up a window with Pending Invoice amount and option to enter *Card details followed by clicking on PAY button.



The screenshot shows a web browser window with the URL <https://rdsfx.ap4.visual.force.com/apex/ewaycall?id=a046F00001Fhfvw>. The page is titled "Pay Invoice" and features logos for VISA, MasterCard, AMERICAN EXPRESS, and DISCOVER. The form contains the following fields:

- Payment amount:** 6600
- Name on card:** John Doe
- Card number:** 4444333322221111
- Expiry Month:** 04
- Expiry Year:** 2017
- Security code:** 123

A green "Pay" button is located at the bottom of the form.

Payments are processed by eWay and transaction detail updated back to Salesforce Invoice under eWay Transactions.

On successful transaction payment detail is updated to Xero.

*Card details are managed by eWay, no details are stored in Salesforce.

13.Other Payments

The other payments can be used to capture payments for instance bank payments, which is then recorded in Salesforce & Xero

River Cloud2 has 281.00 in outstanding credit.

[Credit this invoice](#)

Pay Invoice

Payment amount

100.00

Payment Date

[6/05/2022]

Payment Account

--None--

Payment Description

[Pay](#)

Upon successful payment, Transaction details are updated under Payments and eWay Transactions related list.

Invoice INV-0013

New Contact Edit New Opportunity

Related Details

Invoice Line Item (1)

INVOICE LINE ITEMS NAME	DESCRIPTION	QUANTITY	UNITAMOUNT
TR-00002330	Test Opp M-Doc 10 GB - Test Desc	2.00	\$50.00

[View All](#)

Payments (0)

Eway Transactions (0)

Notes & Attachments (0) [Upload Files](#)

[Upload Files](#)

Or drop files

Activity

New Event New Task Log a Call

Create new...

Filters: All time All

[More Steps](#)

No next steps. To get things moving, add a task or set up a meeting.

Past Activities

No past activity. Past meetings and tasks marked as done show up here.

[Load More Past Activities](#)

New Case
New Lead
Printable View
Generate PDF
Send Invoice
Approve Xero Invoice
Eway Pay
Other Pay

14.Xero Tax / Branding

Click on the <Xero Tax/Branding > tab followed by clicking on the button <Get Xero Tax Codes>

This will retrieve tax codes from your Xero Org

Update these <Xero Tax Codes> values highlighted in the image to <Opportunity Products> object custom field <Xero Tax Code> picklist.

GET XERO TAX CODES

GET XERO BRANDING THEME ID

GET ACCOUNT CODES

TAX NAME	TAX CODE	TAX VALUE	BRANDING THEME NAME	BRANDING THEME ID
Sales Tax on Imports	GSTONIMPORTS	0.0		
Tax on Purchases	INPUT	0.0		
Tax Exempt	NONE	0.0		
Tax on Sales	OUTPUT	0.0		
ACCOUNTS NAME			ACCOUNT CODES	

For Branding click on <Get Xero Branding Theme Id>

Update the custom field <Xero Branding Theme> of Opportunity object. The values should be the “Branding Theme Name” in this example the value is “Standard”

GET XERO TAX CODES			GET XERO BRANDING THEME ID		GET ACCOUNT CODES	
TAX NAME	TAX CODE	TAX VALUE	BRANDING THEME NAME		BRANDING THEME ID	
Sales Tax on Imports	GSTONIMPORTS	0.0	Standard		00b5b08d-970e-4467-90da-98e3a6ac3e0c	
Tax on Purchases	INPUT	0.0				
Tax Exempt	NONE	0.0				
Tax on Sales	OUTPUT	0.0				

For Account Codes click on <Get Account Codes>

GET XERO TAX CODES

GET XERO BRANDING THEME ID

GET ACCOUNT CODES

TAX NAME	TAX CODE	TAX VALUE	BRANDING THEME NAME	BRANDING THEME ID
Sales Tax on Imports	GSTONIMPORTS	0.0	Standard	00b5b08d-970e-4467-90da-98e3a6ac3e0c
Tax on Purchases	INPUT	0.0		
Tax Exempt	NONE	0.0		
Tax on Sales	OUTPUT	0.0		

ACCOUNTS NAME	ACCOUNT CODES
(REVENUE) 200-Sales	200
(REVENUE) 260-Other Revenue	260
(REVENUE) 270-Interest Income	270
(DIRECTCOSTS) 310-Cost of Goods Sold	310
(EXPENSE) 400-Advertising	400

15.Auto Invoice Creation using Flow

Invoice auto creation and updating is based on the opportunity (or any other objects) create, edit and condition mentioned in the flow.

Conditions are based on use cases such as Opportunity Stage = “Closed won” or as required by the business.

Step 1: Start a New Flow, choose the option “Record-Triggered Flow”

The screenshot shows the 'New Flow' interface. At the top, it says 'New Flow'. Below that, there are two tabs: 'Core' and 'All + Templates'. Under the 'Core' tab, there are five flow types listed:

- Screen Flow**: Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and ...
- Record-Triggered Flow**: Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background. (This option is highlighted with a blue border and a checkmark icon.)
- Schedule-Triggered Flow**: Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.
- Platform Event—Triggered Flow**: Launches when a platform event message is received. This autolaunched flow runs in the background.
- Autolaunched Flow (No Trigger)**: Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.

At the bottom right, there is a blue 'Create' button.

Step 2: Select the object and choose the criteria

The screenshot shows the 'Configure Start' and 'Configure Trigger' sections of the Salesforce Flow Builder.

Configure Start

Object: Opportunity

Configure Trigger

Trigger the Flow When:

- ☐ A record is created
- ☐ A record is updated
- ☒ A record is created or updated
- ☐ A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

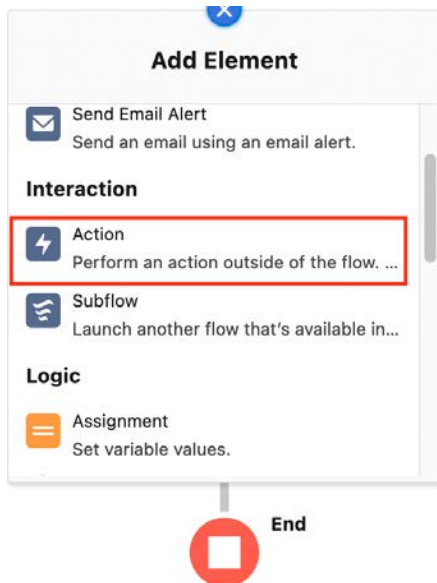
If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

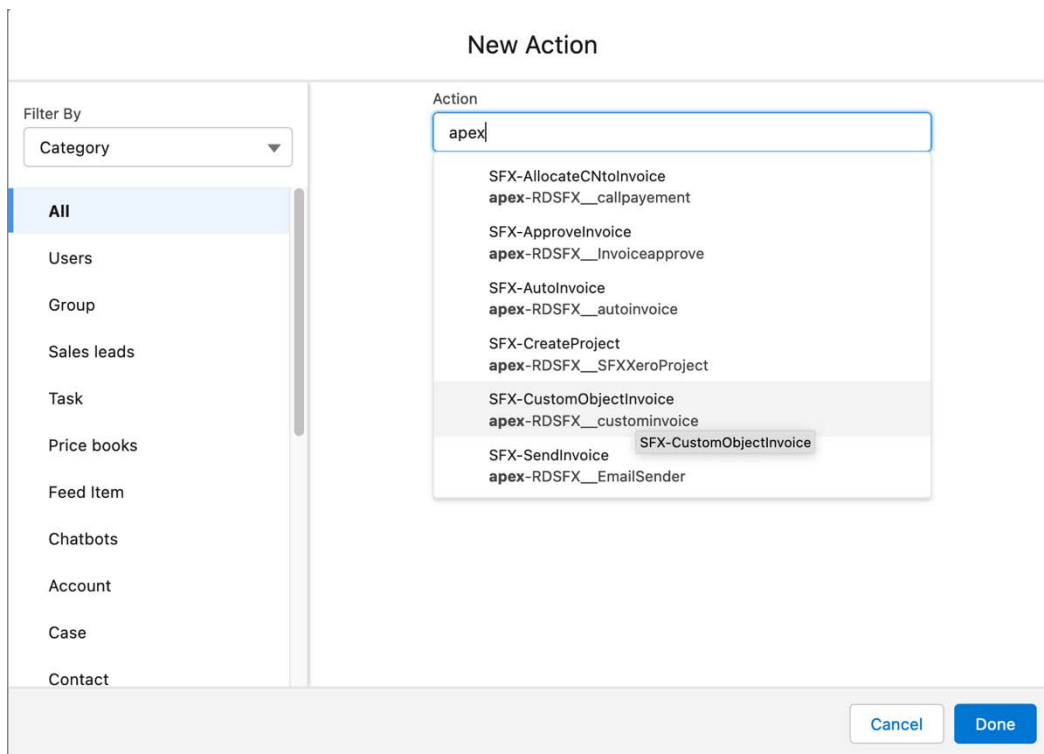
All Conditions Are Met (AND)

Field	Operator	Value
StageName	Equals	Closed Won

Step 3: Click “Add Element” and Click “Action”



Step 4: Select action name SFX-CustomObjectInvoice (you could also select other actions such as Allocate Credit Note, Invoice Approve, Auto Invoice, Send Invoice and Create Project)



Step 5: Include parameter ids as below by replacing mapping id

recordid=<record id field>&mappingid=<mappingid>

Ex: recordid={!\$Record.Id}&mappingid=a0S0o00001lhu7M

Edit "SFX-CustomObjectInvoice" Apex action

Use values from earlier in the flow to set the inputs for the "SFX-CustomObjectInvoice" Apex action. To use its outputs later in the flow, store them in variables.

Create Invoice (Create_Invoice) 

Set Input Values

 parameterIds

recordid={!\$Record.Id}&mappingid=a0A0I00



Cancel

Done

16.Auto Invoice Creation using Process Builder

Invoice auto creation and updating is based on the opportunity create, edit and condition mentioned in Process builder.

Conditions are based on use cases such as Opportunity Stage = “Closed won” or as required by the business.

Following configuration is for an example where **Opportunity Stage = “Closed won”** and is applicable in two different scenarios.

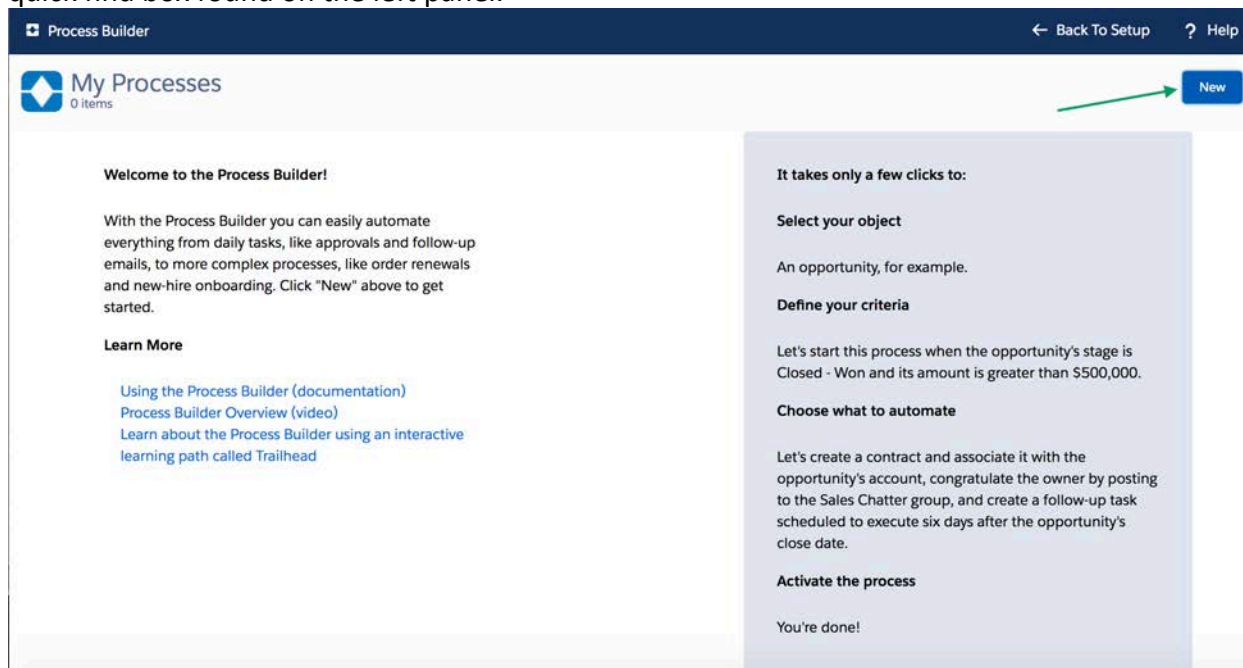
Scenario 1: New Invoice Creation

Invoice auto-creation is based on creating of new opportunity, condition being Opportunity Stage = “Closed won”

Scenario 2: Edit Opportunity line item (for an opportunity with existing Invoice)

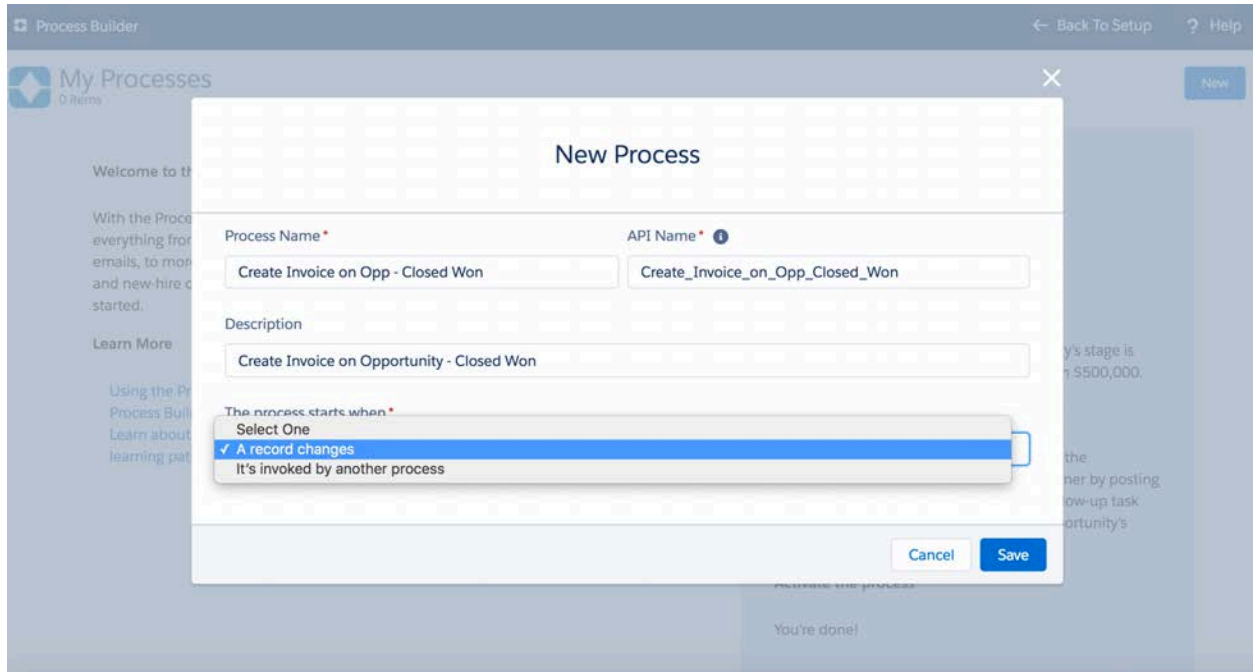
In a scenario where the opportunity line items have to be modified, the Invoice is auto updated, only upon editing the opportunity

To setup a Process Builder, click on <Setup> and search for “Process Builder” in the quick find box found on the left panel.

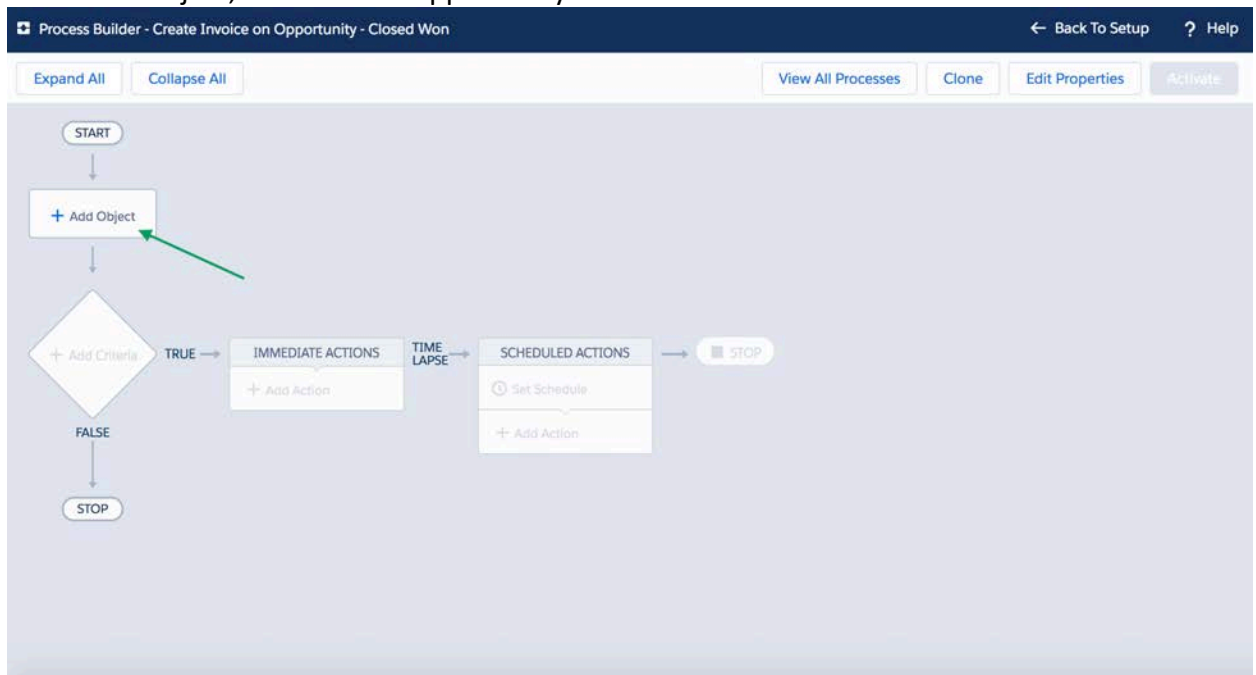


Click on <New> button to create a new process.

Add a Process name as “Create Invoice on Opportunity – Stage”



Select the Object, in this case “Opportunity “



Process Builder - Create Invoice on Opportunity - Closed Won

Expand All Collapse All View All Processes Clone Edit Properties Activate

START

+ Add Object

+ Add Criteria

TRUE

IMMEDIATE ACTIONS

+ Add Action

TIME LAPSE

SCHEDULE

FALSE

STOP

Choose Object and Specify When to Start the Process

Object *

Opportunity

Start the process *

☐ only when a record is created

☒ when a record is created or edited

> Advanced

Save Cancel

Add the Criteria as shown in the diagram below, in this case Opportunity Stage = "Closed Won"

Process Builder - Create Invoice on Opportunity - Closed Won

Expand All Collapse All View All Processes Clone Edit Properties Activate

START

Opportunity

+ Add Criteria

TRUE

IMMEDIATE ACTIONS

+ Add Action

FALSE

STOP

Define Criteria for this Action Group

Criteria Name *

Opp - Closed Won

Criteria for Executing Actions *

☒ Conditions are met

☐ Formula evaluates to true

☐ No criteria—just execute the actions!

Set Conditions

Field *	Operator *	Type *
1 [Opportunity]... Q	Equals	Picklist

+ Add Row

Conditions *

☒ All of the conditions are met (AND)

☐ Any of the conditions are met (OR)

Opportunity Stage

Select One
Prospecting
Qualification
Needs Analysis
Value Proposition
Id. Decision Makers
Perception Analysis
Proposal/Price Quote
Negotiation/Review
✓ Closed Won
Closed Lost

Save Cancel

Next add Action. For the action select “Apex”, provide a name and select the Apex class “SFX-AutoInvoice”

Process Builder - Create Invoice on Opportunity - Closed Won

Expand All Collapse All View All Processes Clone Edit Properties Activate

START

Opportunity

Opp - Closed Won

TRUE

IMMEDIATE ACTIONS

+ Add Action

STOP

FALSE

+ Add Criteria

TRUE

IMMEDIATE ACTIONS

+ Add Action

FALSE

STOP

Select and Define Action

Action Type *

Apex

Action Name *

SFX Auto Invoice

Apex Class *

SFX-AutoInvoice

Set Apex Variables

Field *	Type *	Value *
OpportunityIds	Reference	[Opportunity].Id

+ Add Row

Save Cancel

Followed by “Set Apex Variable”,
Select Field as OpportunityIds
Select Type as reference and
Select Value as Opportunity.ID
Save and **Activate** the Process builder.

Pre-requisite on Opportunity Create or Update:

- Opportunity should be linked to Account
- Opportunity should have line items with Xero Tax code values (Refer Index#13)
- Opportunity contact role with primary contact
- Opportunity should have “Xero Branding Theme” values updated

NOTE:

- Editing of opportunity line items of an existing Invoice is based on editing the Opportunity
- Any Invoice with Status as “Authorised” cannot be edited or modified via Process builder
- Incase of an additional invoice existing on the opportunity object, the invoice with latest date/time stamp is updated via the Process builder upon editing and saving the Opportunity

17. Automate Invoice creation on a Custom object using Process Builder

To automate the invoice creation, add a criteria such as on changing a stage, ideally a pick list field on the custom object.

Create a process with the criteria that is required to satisfy and initiate an Invoice creation.

Add action, select Action Type as APEX, give a name. Select SFX-CustomObjectInvoice Apex class

Click on “Add Row”

In the field section select parameterIds, Type should be formula.

For the formula use the below function with required parameters

'recordid='+<record id field>+'&mappingid=<mappingid>'

Ex: 'recordid='+[Energy_Audit__c].Id+'&mappingid=a0S0o00001lhu7M'

NOTE: Ensure there is no extra spaces in-between the formula

Click Save followed by activating the process builder

The screenshot displays the Salesforce Process Builder interface. On the left, a process flowchart for 'energy audit' is shown. It starts with a decision diamond labeled 'InvCust'. If 'TRUE', it leads to 'IMMEDIATE ACTIONS' and then to a 'STOP' node. If 'FALSE', it leads to another decision diamond labeled '+ Add Criteria'. From '+ Add Criteria', if 'TRUE', it leads to 'IMMEDIATE ACTIONS' and then to a 'STOP' node. If 'FALSE', it leads to a 'STOP' node. On the right, the 'Select and Define Action' panel is open. The 'Action Name' is 'InvOnCustomObject'. The 'Apex Class' is 'SFX-CustomObjectInvoice'. Under 'Set Apex Variables', a table is shown with columns 'Field', 'Type', and 'Value'. The first row has 'parameterIds' in the 'Field' column, 'Formula' in the 'Type' column, and 'Build a formula...' in the 'Value' column. Below the table, the formula is entered: 'recordid='+[energy_audit__c].Id+'&mappingid=a0J2w0000002MUQ'. The 'Save' button is visible at the bottom of the panel.

18.Sync Invoices

SFX can sync invoices from Xero to Salesforce. Two types of sync provided by SFX.

- Auto sync
- Manual sync

Manual Sync

You can sync invoices from SFX setup tab



Sync Xero Invoices

Sync Xero Credit Notes

Sync Configuration

Click on a date to sync invoices created/updated after selected date or simply enter the invoice numbers separated by a comma (ex: INV-0001,INV-002).

**SFX - Contact and Invoice Sync**
Match Rohde Corp - 80,000 Widgets Xero to Salesforce(Last Sync:2022-05-06 12:12:27)

Sync invoices created/edited after
2022-05-06

Select Xero Org
Primary/Default Xero Org

CLICK TO SYNC

Note: If number of invoices to sync exceeds 20, sync is initiated in batches of 20 invoices.

OR

Please enter comma separated invoice numbers to sync from Xero. Maximum 25 invoices per minute

Select Xero Org

Primary/Default Xero Org

CLICK TO SYNC

Note: If number of invoices to sync exceeds 20, sync is initiated in batches of 20 invoices.

[Click here to export invoices as csv file](#)

Total invoices for sync:4

New invoices:1

Existing invoices:3

Xero Information

Invoice Number

INV-0036

Contact

River Cloud2 - -

Salesforce Information

Account Name / Email

Account Mapped

Manual Account Selection

CREATE/UPDATE INVOICES

Account and contact auto matched by email if already exist in salesforce.
If account and contact are new, then user can manually map from xero contact.

If more than 50 invoices, sync can be completed by batches of 50 invoices.

On clicking create/update invoices, new invoices will be created in salesforce and existing will be updated. Logs can be tracked under SFX Logs tab.

All Search SFX Logs and more...

SFX Home SFX Setup Accounts Contacts Opportunities Invoices Products Reports Create Invoice Xero Tax/Branding SFX Logs

SFX Logs L-0000067 New

Related Details

SFX Logs Name

L-0000067

Owner

Sandeep Kotian

Sync type

Manual sync - Xero to SF

Log Message

Following invoices created/updated.INV-0001,

Status

Success

Created Date Time

6/19/2019 6:23 AM

Created By

Sandeep Kotian, 6/19/2019 6:23 AM

Last Modified By

Sandeep Kotian, 6/19/2019 6:23 AM

Auto Sync - Every 15 mins New invoices / existing invoices created or updated from Xero to Salesforce. Logs can be tracked under SFX Logs tab

19. Multiple Invoices on existing object on selected line items

This section covers Invoice creation with two options

1. To Create New Invoice every time an item is added
2. To update Invoice if already one exists

Option 1

To create multiple invoices on the same object select the option <Everytime Create New Xero Invoice> on the <Xero Custom Object Mapping> object

- For the functionality to execute as required add the <Exclude Lineltem field> in <Xero Xustom Object Mapping> to exclude line items from xero invoice

Note: this field mapping should be always a check box

Option 2

To create single invoice or update the same Invoice select the option <Update if Invoice exists in Xero>

▼ Basic Mapping	
Xero Custom Object Mapping Name	Opportunity Map
Mapping ID	a0A0I00000zGvet
Invoice/Bill Object	Opportunity
Invoice/Bill Line Item Object	OpportunityLineltem
SFX Invoice Lookup Field	Opportunity__c
Lookup Field Lineltem to Invoice	OpportunityId
Invoice Create/Update	Everytime Create New Xero Invoice
▼ Xero Invoice Object Mapping	
Custom Invoice/Bill Number	Invoice Reference Field
Invoice Account Lookup Field	Xero_Invoice_Referecnce__c
Invoice Address Mapping	Invoice Contact Lookup Field
Invoice Date Field	Contact__c
Xero Org Unique Id Field	Invoice Due Date Field
Invoice / Bill / Credit Note	CloseDate
Invoice Status	Tax Exclusive/Inclusive Field
DRAFT	Currency Code Field
Xero Branding Theme Field	
▼ Xero Invoice Line Item Object Mapping	
Line Item Item Code Field	Line Item Description Field
Line Item Quantity Field	Description
Line Item Xero Account Code	Line Item UnitPrice Field
Line Item Discount Field	UnitPrice
Exclude Lineltem	Line Item Xero Tax Rate
truestest__c	Xero_Tax_Rate__c

NOTE: If the line item invoice flag is left unchecked, this item will be included every time an Invoice is created.

20.Multi-Currency

SFX Advanced/Enterprise version enables Multi Currency from Xero.

You can create invoice using predefined currencies from Xero.

The screenshot displays the 'Invoice Line Item Details' section of the SFX Advanced/Enterprise interface. At the top, there are fields for 'Contact', 'Opportunity', 'Invoice Date' (set to 7/17/2019), 'Due Date' (set to 7/17/2019), 'Status' (set to DRAFT), and 'Branding' (set to Standard). Below these is a table for 'Invoice Line Item Details'. The table has columns: 'Remove', 'Description', 'Quantity', 'Unit Price', 'Accounts', 'Discount Rate(%)', and 'Tax Rate'. There are three rows, each with a blue 'X' in the 'Remove' column, a description field, and a 'Tax on Sales' dropdown in the 'Tax Rate' column. A red arrow points to the 'AUD Australian Dollar' dropdown menu at the top left of the table. An 'Add Row' button is located at the bottom left of the table.

Remove	Description	Quantity	Unit Price	Accounts	Discount Rate(%)	Tax Rate
X				(REVENUE) 200-Sales		Tax on Sales
X				(REVENUE) 200-Sales		Tax on Sales
X				(REVENUE) 200-Sales		Tax on Sales

Invoices are created based on the Currency selected and the same is updated in Xero.

Currency field can be updated in opportunity object using Process Builder to automate invoice creation.

21.Multi Xero Org

SFX Enterprise version enables Multiple Xero Org Integration.

Setup Multi Xero Org

Connect and authorize your Xero org followed by selecting the required org under multi-org section. (Please refer/follow steps to connect Primary / Default Xero org)

 Xero Multi Org Setup

No.	Connected Xero Org	Select/Change Xero Org	Active	Sync	Org Unique Id	Remove
1	TESTORG2	✓ -Select- TESTORG2 TESTORG	☒	☒	31fcc4f6-828b-aa8f-e390-c87f295dee58	X

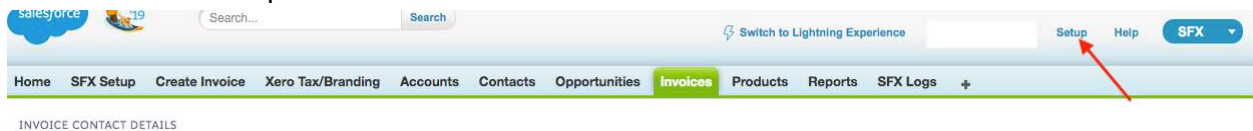
Add Org

Save

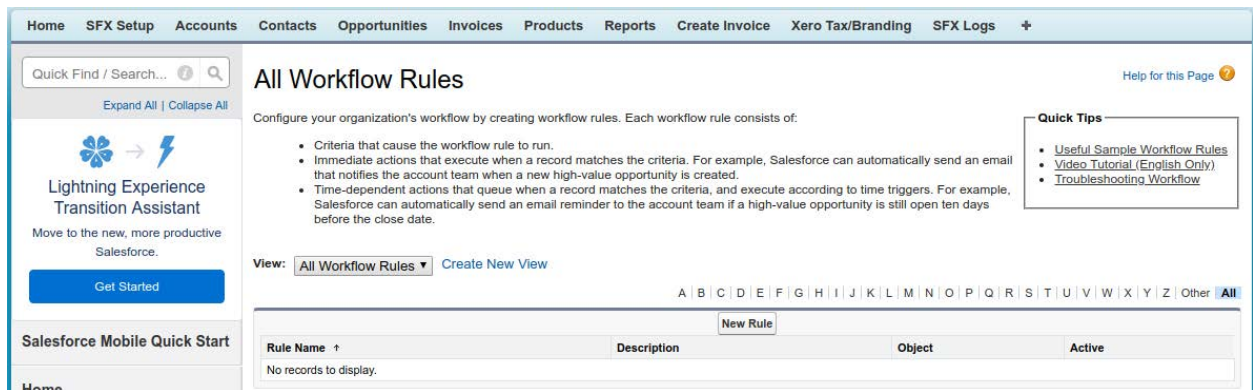
22.Auto Invoice creation on Multiple Xero Org

Dynamically select Xero Org and create invoice from SFX Auto Invoice using workflow rule and Flow/Process builder. You could do the same using a formula field

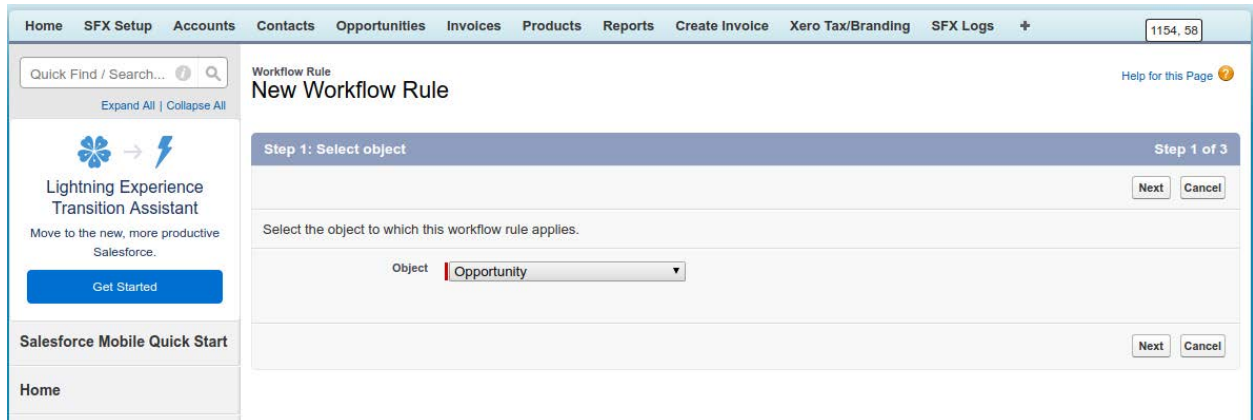
- Click on setup from salesforce menu



- Go to Workflow and Approval Process -> Workflow Rules



- Create a new workflow rule on opportunity object



- Add criteria for Xero org selection

New Workflow Rule Help for this Page

Opportunity

Step 2: Configure Workflow Rule

Step 2 of 3

Previous

Save & Next

Cancel

Enter the name, description, and criteria to trigger your workflow rule. In the next step, associate workflow actions with this workflow rule.

Edit Rule

= Required Information

Object

Opportunity

Rule Name

Auto Xero UniqID Update

Description

Evaluation Criteria

Evaluate the rule when a record is:

☐ created
☐ created, and every time it's edited
☒ created, and any time it's edited to subsequently meet criteria i

How do I choose?

Rule Criteria

Run this rule if the criteria are met :

Field	Operator	Value	
Opportunity: Amount	greater than	5000	AND
Opportunity: Stage	equals	Closed Won	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

[Add Filter Logic...](#)

Previous

Save & Next

Cancel

- Add workflow field update action

Edit Rule Auto Xero UniqID Update

[Help for this Page](#)

Step 3: Specify Workflow Actions

Step 3 of 3

Done

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria

(Opportunity: Amount GREATER THAN 5000) AND (Opportunity: Stage EQUALS Closed Won)

Evaluation Criteria

Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

No workflow actions have been added.

[Add Workflow Action](#)

Time-Dependent Workflow Actions

[See an example](#)

i No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

[Add Time Trigger](#)

- Update <Xero Org Unique Id> field from opportunity

Edit Field Update Help for this Page ?

Xero Org Uniq Id Update

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.

Field Update Edit

Save Save & New Cancel

Identification

= Required Information

Name

Xero Org Uniq Id Update

Unique Name

Xero_Org_Uniq_Id_Upda

Description

Object

Opportunity

Field to Update

Opportunity Xero Org Unique Id

Field Data Type

Text

Re-evaluate Workflow Rules after Field Change

☐ i

Specify New Field Value

Text Options

☐ A blank value (null)

☒ Use a formula to set the new value

Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7)

Save Save & New Cancel

- Copy Org unique id from Xero Multi Org Setup under SFX Setup tab, where you need to create an invoice.

Xero Multi Org Setup

No.	Xero Org Name	Consumer Key	Active	Sync	Org Unique Id	Remove
1	RD_Org1	*****KL	☐	☐	b1289ff5-03fa-c38a-b7e2-c137ebbc087d	X
2	RD_Org2	*****ML	☒	☒	53101a9f-b35d-48a9-30a7-053a6e24de1e	X

Add Org

Save

- Update copied <Org Unique id> in the new field value enclosed with single quotes ('')

Edit Field Update

[Help for this Page](#)

Xero Org Uniq Id Update

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.

Field Update Edit

Save Save & New Cancel

Identification

= Required Information

Name

Xero Org Uniq Id Update

Unique Name

Xero_Org_Uniq_Id_Upda

Description

Object

Opportunity

Field to Update

Opportunity: Xero Org Unique Id

Field Data Type

Text

Re-evaluate Workflow Rules after Field Change

☐

Specify New Field Value

Text Options

☐ A blank value (null)
 ☒ Use a formula to set the new value

[Show Formula Editor](#)

'53101a9f-b35d-48a9-30a7-053a6e24de1e'

Use [formula syntax](#): Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7)

Save Save & New Cancel

- Save and activate the workflow rule.

Workflow Rule
Auto Xero UniqID Update
[Help for this Page](#)

Workflow Rule Detail

Edit
Delete
Clone
Activate

Rule Name	Auto Xero UniqID Update	Object	Opportunity
Active	☐	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description			
Rule Criteria	(Opportunity: Amount GREATER THAN 5000) AND (Opportunity: Stage EQUALS Closed Won)		
Created By	Nagaveena A, 7/17/2019 3:34 AM	Modified By	Nagaveena A, 7/17/2019 3:47 AM

Workflow Actions

Edit

Immediate Workflow Actions

Type	Description
Field Update	Xero Org Uniq Id Update

Time-Dependent Workflow Actions [See an example](#)

No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

Edit

Note: If criteria of workflow rule does not match or field updated as empty then the Invoice is created under Primary / Default Xero Org.

23.Schedule Batch Invoicing

Batch invoicing allows you to generate multiple invoices all created at the same time for a group of customers from a single-entry input. This way, it speeds up your invoicing time rather than having to go through the same process for every single invoice every month or end of your billing cycle.

Batch invoicing is available in SFX enterprise and advanced editions only.

Go to the tab <Scheduled batch invoicing> to create a batch for generating invoices.

Create New Batch

Batch Description: CR2

Mapping Id: a0H5g000001WL5d

Field to exclude invoice created from the same batch(API Name): Inv_Create_Date__c

Invoice Object API Name: Opportunity

Criteria Field to select Invoice(API Name): Batch__c

Xero Org Id (Leave blank for primary org): f15bd68d-e016-cec1-370e-811706360819

Scheduler Information

Execution Frequency: Monthly

When to execute Day of month: 12

Start Date: 12/9/2021 [26/9/2021]

Email for execution report:

Month Day / Weekend: Month Day

Time of Execution: 16:35:00.000

Next Date of Execution: 12/10/2021, 5:35 pm

Verify Submit

Batch invoice can be created on any object (standard or custom) on which a Xero custom object mapping record is created. You can define a criteria based on your business process.

Note: The field "Field to exclude invoice created from the same batch" should be a date field.

The batch invoice frequency can be defined monthly (or daily) and set to schedule on a day of the month or weekends. There is an option to send the batch execution report to your email (Recommended). Once the batch is set the following records are created. You can create multiple batch invoicing records as required.

Batch Invoice Scheduler									
No.	Batch No.	Description.	Invoice object	Frequency	Day of month/Week	Start Date/Start Time	Next Date of Execution	Active	Remove
1	BCH-000001	CR2	Opportunity	Monthly	Month Day/12	September 12, 2021 /16:35:00.000Z	12/10/2021, 5:35 pm	☒	EDIT X
2	BCH-000000	CR1	Opportunity	Monthly	Month Day/11	September 11, 2021 /21:05:00.000Z	11/10/2021, 10:05 pm	☒	EDIT X

The Batch number viz., BCH-000001 should then be made available in the records of the object that is used for invoicing. In the example given on this page, the Batch number will be entered in the field specified as Batch__c

24. Purchase Order & Project configuration

Map any object from Salesforce to create purchase order or projects in Xero.

Follow the procedure to create a button to initiate the purchase order creation or projects creation and sync from Xero (**Creating “New Invoice” button** found on page 21)

Purchase Order Related

Delivery Address ⓘ

Attention To ⓘ

Telephone ⓘ

Delivery Instructions ⓘ

Project Related

Project Name Field ⓘ

Project Deadline Date Field ⓘ

Project estimateAmount Field ⓘ

Xero Project Id Field ⓘ

Log

Invoice Log Status ⓘ

Error Log ⓘ

25.Others

Following new features are released in the SFX release 2.0

1. Approval process to convert a draft Invoice as approved
2. Invoice is auto downloaded when Invoice is approved
3. Invoices sent from Salesforce marked as sent in Xero
4. Option to download historical invoices in .csv format
5. Option to auto-download pdf only for Purchase Order in draft mode
6. Option to retrieve Invoice pdf from Xero once the invoice is approved
7. Option to send to and cc emails with Invoice attachment.
8. Option to automate emailing invoice using process builder or flow
9. Option to block invoice creation if the matching item is not found in Xero
10. Option to update Salesforce contacts to Xero
11. Auto-Allocation of credit note
 - a. This can be achieved by calling the apex method as per the below parameters
RDSFX.callpayment.creditallocation(creditnoteid, invoiceid, CN amount)

Xero Invoice Object Mapping

Custom Invoice/Bill Number ⓘ 	Invoice Reference Field ⓘ
* Invoice Account Lookup Field ⓘ Accountid	Invoice Contact Lookup Field ⓘ Cont_act__c
Invoice Address Mapping --None--	Account Ship Addr to Xero Delivery Addr ☐
Invoice Date Field ⓘ RDSFX__Xero_Invoice_Date__c	Invoice Due Date Field ⓘ Inv_Due_Date__c
Xero Org Unique Id Field Xero_Org_Id__c	Tax Exclusive/Inclusive Field ⓘ
Invoice / Bill / Credit Note ⓘ 	Currency Code Field ⓘ
Invoice Status ⓘ AUTHORISED	Xero Branding Theme Field ⓘ
Contact Email ⓘ 	Contact Phone ⓘ
Update SF Contact to Xero ☐	Download PDF ⓘ ☒

api name of the contact email field, if mentioned will be sent to Xero overriding standard contact email

Xero Invoice Line Item Object Mapping

Do not create invoice if item does not exists in Xero
/ Applied if Item code mapped in salesforce

Line Item Item Code Field ⓘ

ProductCode

Do not create invoice ⓘ



Line Item Description Field ⓘ

Description

▪ Line Item Quantity Field ⓘ

Quantity

▪ Line Item UnitPrice Field

ListPrice

Line Item Xero Account Code ⓘ

RDSFX__Account_Code__c

Line Item Xero Tax Rate ⓘ

RDSFX__Xero_Tax_Rate__c

Line Item Discount Field ⓘ

Xero Tracking Category1 ⓘ

SF Tracking Category1 ⓘ

Xero Tracking Category2 ⓘ

SF Tracking Category2 ⓘ

Exclude LineItem ⓘ

26.eWay Payment Gateway Setup

This feature is *optional* and configured if eWay is used as a Payment Gateway. To setup eWay, click on <Setup> and search for “Custom Settings” in the quick find box found on the left panel.

Custom Settings

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Force.com Web Services API.

Percentage of custom settings data used: 0%
You are currently using 0 MB of custom settings data in your organization, out of an allowed limit of 2 MB.

View: All Create New View

Action	Label	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Manage	Eway	Public	List	RDSFX	Eway Credentials	355	1	355
Manage	Eway Key	Public	List	RDSFX		355	0	0

Click on Manage to enter API+PASS for eWay

Custom Setting Definition

Eway

Create the fields for your custom setting. The data in these fields are cached with the application.

Custom Setting Definition Detail

Label	Value	Object Name	Value
Label	Eway	Object Name	Eway
API Name	RDSFX__Eway__c	Setting Type	List
Visibility	Public	Description	Eway Credentials
Namespace Prefix	RDSFX	Created Date	7/02/2017 9:21 AM
Last Modified Date	7/02/2017 9:21 AM	Record Size	355

Custom Fields

Action	Field Label	API Name	Installed Package	Data Type	Indexed	Modified By
Edit	API+Pass	RDSFX__api_pass__c	SFX	Text Area(255)		js, 7/02/2017 9:21 AM

Enter the API Key and password from eWay as shown

Name should be "Eway Credentials"

API+Pass should be entered as per the given format "API Key":"Password" separated by colon ":"

For Example: C3AB9CoK/S5QImUXK8WdNrYF1VLiXvKS4lCypth9NElBo8L8IY6:Reset!123

Eway Edit

Provide values for the fields you created. This data is cached with the application.

Edit Eway

SaveSave & NewCancel

Eway Information

Name

Eway Credentials

i

API+Pass

C3AB9CoK/S5QImxbcm
oybz+3K0WUXkM0F7K8

Click on Manage to enter Ewaykeydata for Eway Key

Custom Setting Definition

Eway Key

Create the fields for your custom setting. The data in these fields are cached with the application.

Custom Setting Definition Detail				Manage
Label	Eway Key	Object Name	EwayKey	
API Name	RDSFX__EwayKey__c	Setting Type	List	
Visibility	Public	Description		
Namespace Prefix	RDSFX	Created Date	7/02/2017 9:21 AM	
Last Modified Date	7/02/2017 9:21 AM	Record Size	355	

Custom Fields							New
Action	Field Label	API Name	Installed Package	Data Type	Indexed	Modified	
Edit	 Ewaykeydata	RDSFX__Ewaykeydata__c	SFX	Text Area(255)		John	

Enter the Ewaykeydata – Please note to copy and paste as-is the Name and Ewaykeydata as given below:

Name should be "keyname"

Ewaykeydata should be

0hTCZ9Mz39iLW6DImbY8u3X10iPf2BAj5zKiAxmFwfXrHYNAOZMTPrlmoixEubwWnnZQQCcUBh6cnlgsV+p8CRhdySpwTDqgeKSGWTgPkvSzaXw5Zo21WWBVtr8QrA8Dt4YUI8uyJjqWq4gwiQA7U39YRCn3CNgxZqARxB4mMdMMnhrfQfRK67RUKOGTNLRzGpxsUUn4ma8rJswvZSFOWEr8BHdoThoxl7P0YI/DPO+52sDNQ4wLV8ezYX7ImKW

Eway Key Edit

Provide values for the fields you created. This data is cached with the application.

Edit Eway Key

SaveSave & NewCancel

Eway Key Information

Name

keyname

Ewaykeydata

0hTCZ9Mz39iLW6DImbY8u3X10iPf2BAj5zKiAxmFwfXrHYNAOZMTPrlmoixEubwWnnZQQCcUBh6cnlgsV+p8CRhdySpwTDqgeKSGWTgPkvSzaXw5Zo21WWBVtr8QrA8Dt4YUI8uyJjqWq4gwiQA7U39YRCn3CNgxZqARxB4mMdMMnhrfQfRK67RUKOGTNLRzGpxsUUn4ma8rJswvZSFOWEr8BHdoThoxl7P0YI/DPO+52sDNQ4wLV8ezYX7ImKW

Add another record and update the fields **Name** and **Ewaykeydata** with following:
(Please note to copy and paste as-is)

Name should be “keyname2”

Ewaykeydata should be

xHDLRhzo5EL5RFC5pPB9SUUf2SAD9YMwx1/5x+MDDxY1E8HcrSqBYulaxUdJg+KfMOQH6XhYpaz6MbOLu8ZH0bw==

Eway Key Edit

Provide values for the fields you created. This data is cached with the application.

Edit Eway Key

SaveSave & NewCancel

Eway Key Information

Name

keyname2

Ewaykeydata

xHDLRhzo5EL5RFC5pPB9SUUf2SAD9YMwx1/5

27.Contact Us

THANK YOU!!! for using SFX 1.93

We are here to connect you

For any support issues please contact support@riverdalecloud.com.au