User Manual

KT Xero Connect

Overview

Automate your business: A solution that will reduce time, creating an invoice from Opportunity, instant sync with Xero.

- A Solution that automates your business and reduces your time
- Invoice, Bills Automatically created in Xero and the same will be reflected in Salesforce
- Create a contact in Xero from Salesforce
- Invoice automatically created in Xero as draft, Status will get automatically updated in Salesforce if Status of Invoice changed in Xero
- Status of your Invoices will be visible to agent in Salesforce in detail Data table
- User Can View/Download PDF format of Invoices In Salesforce
- Create Invoice for products in OpportunityLineItem

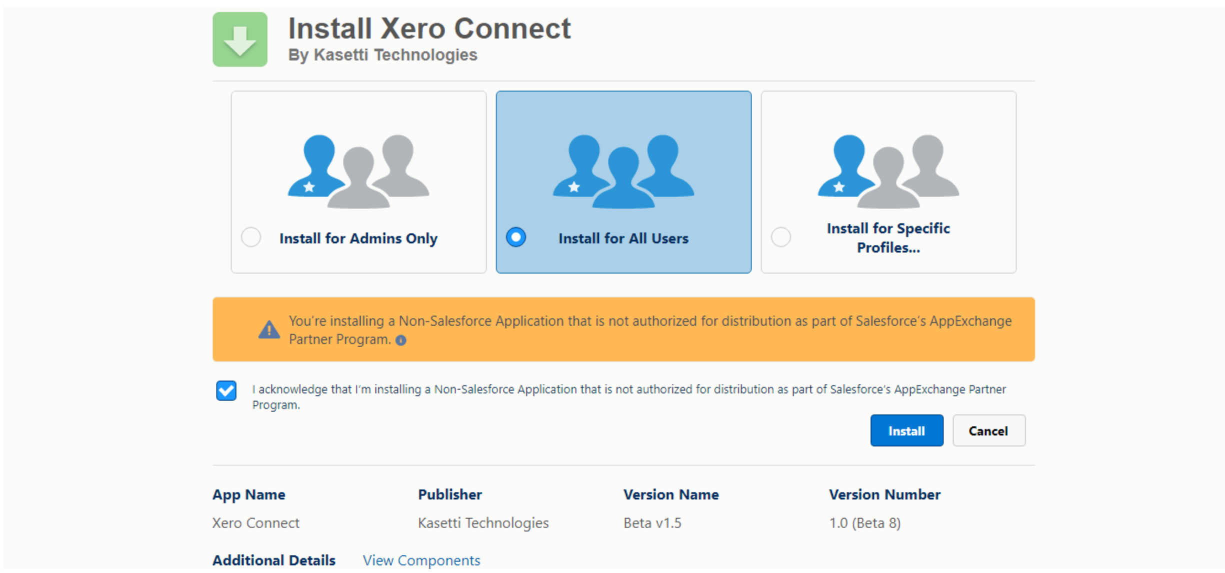
Prerequisites

1. Xero account
2. Salesforce

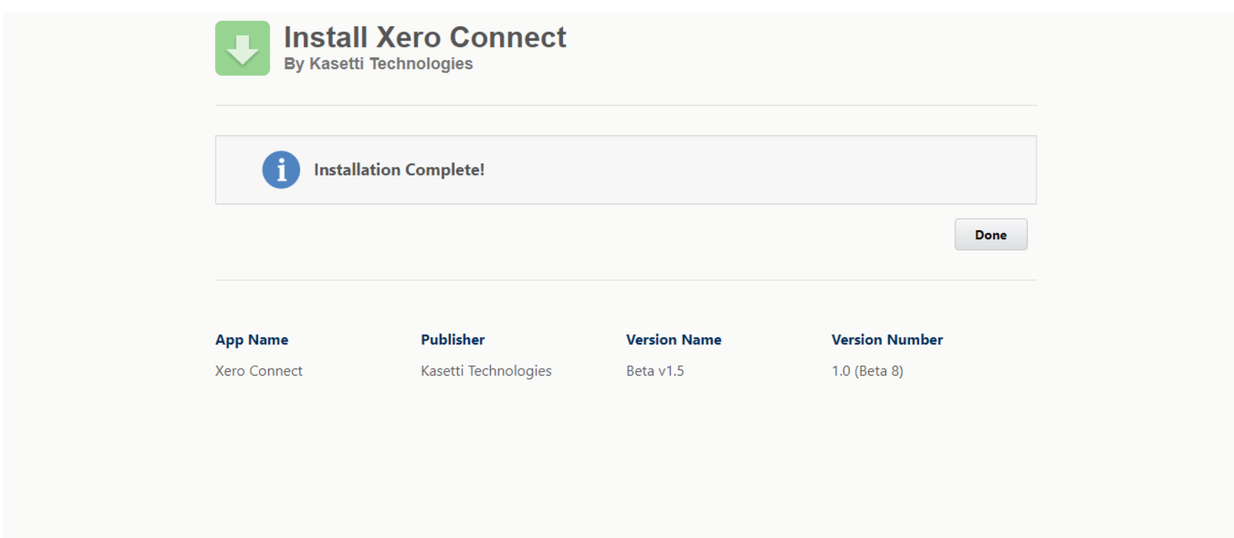
How to Install KT Xero Connect:

Click on This link:

Log in to your Salesforce org, and Install it for users:

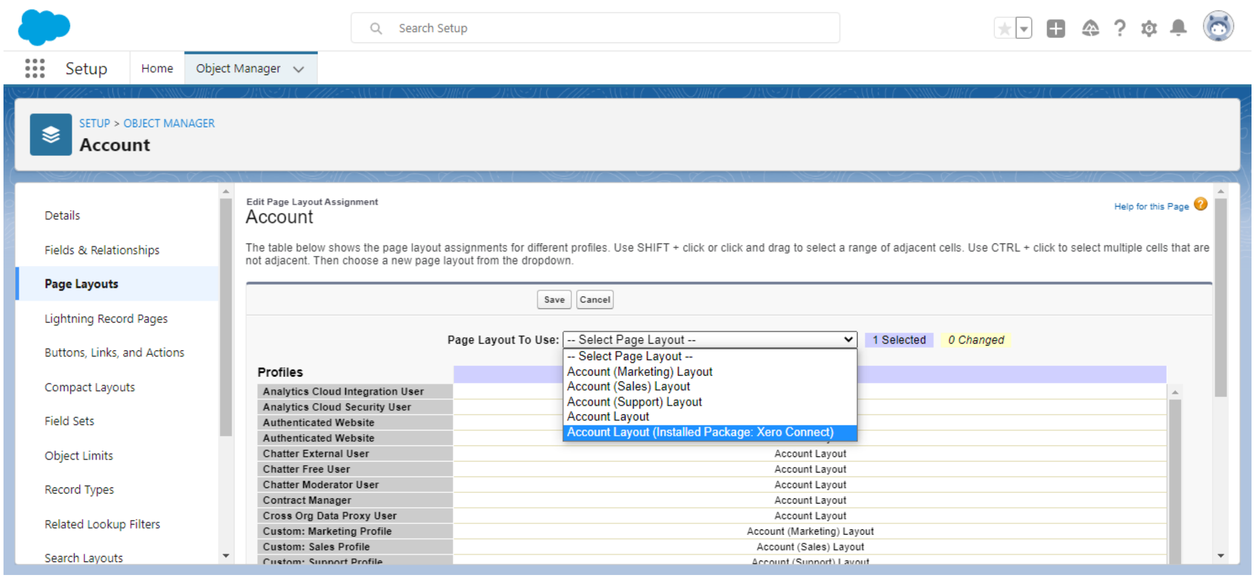


KT Xero Connect will now install in the selected Org

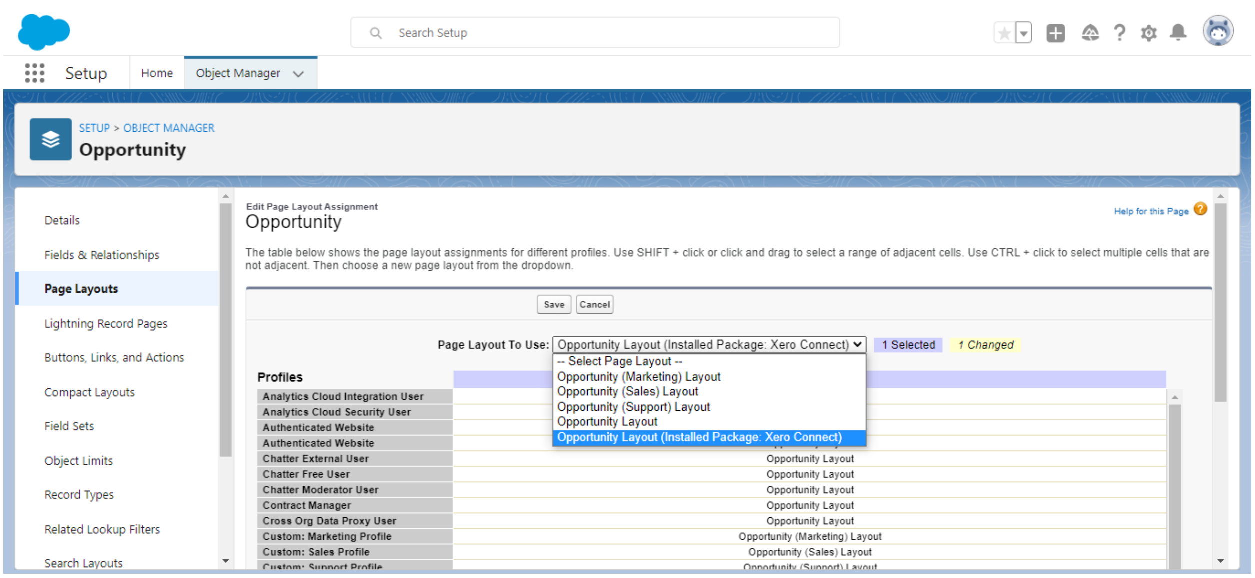


After installation we need to edit page layout assignments, and assign it to your users:

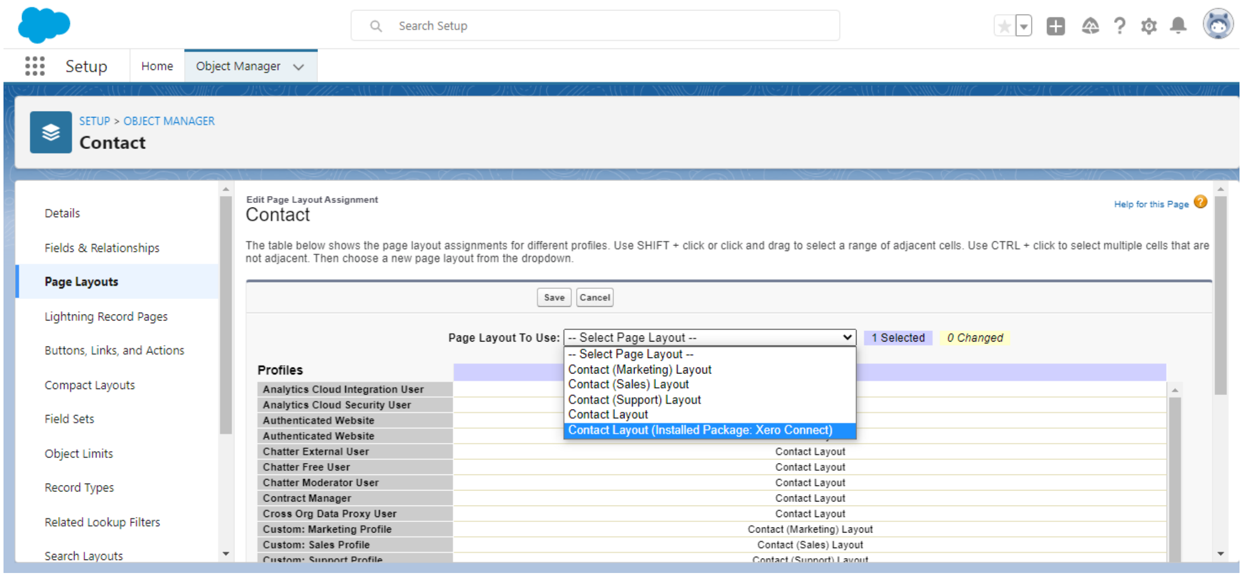
1. Account Object (Select Installed package Layout)



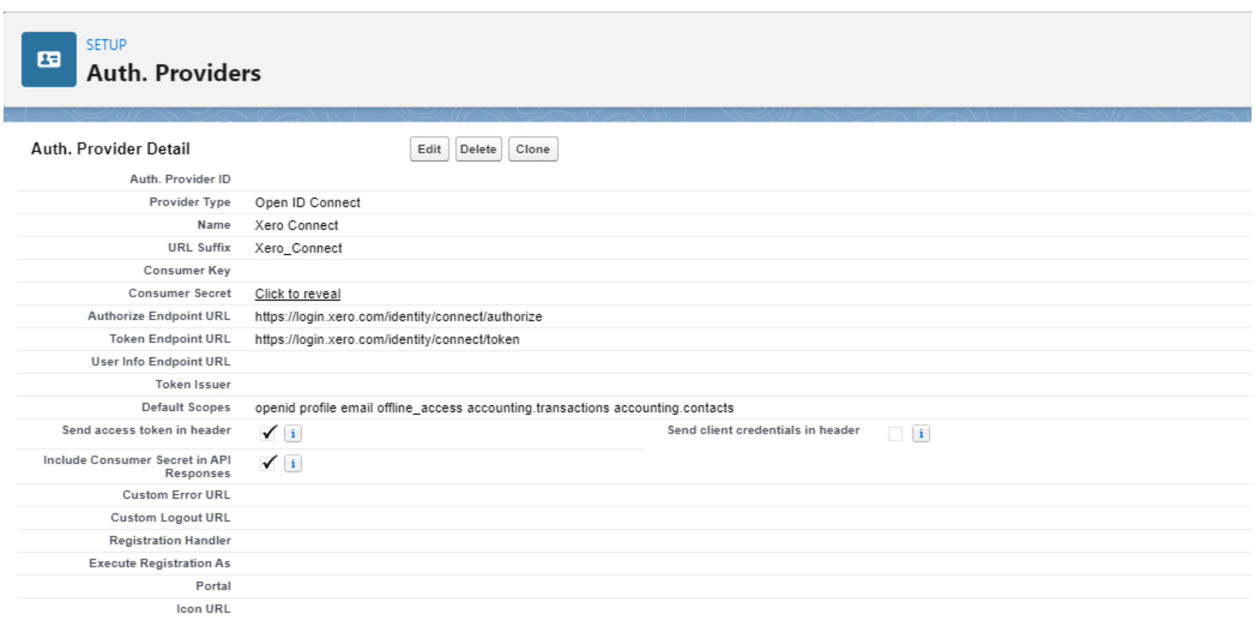
2. Opportunity Object (Select Installed package Layout)



3. Contact Object (Select Installed package Layout)



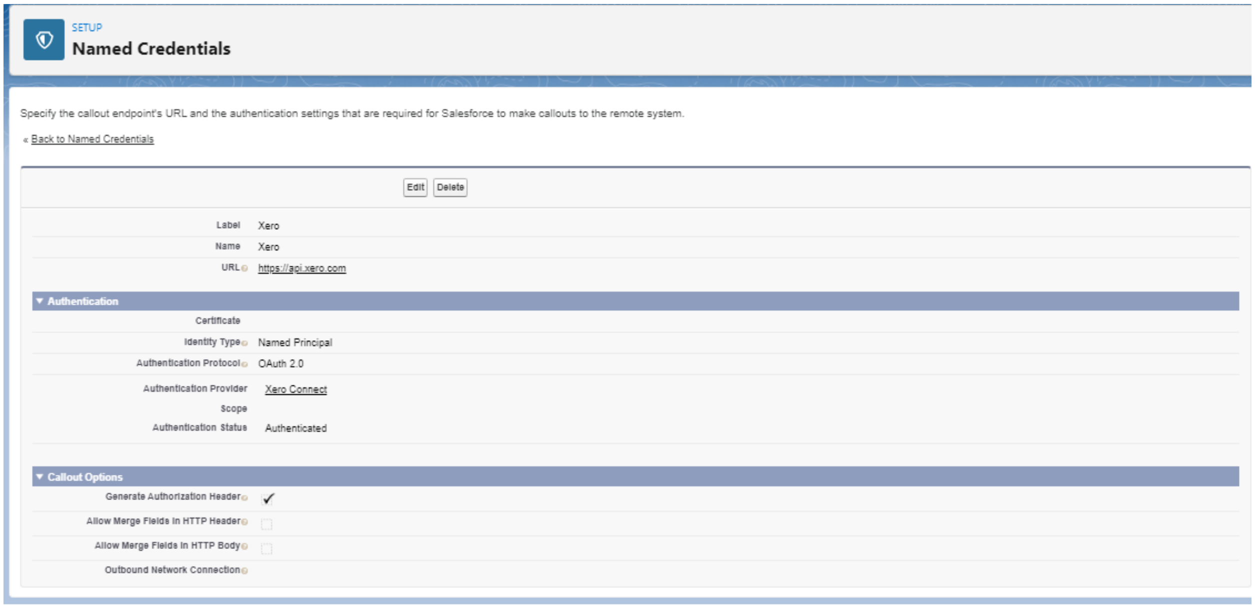
Create an Auth. Provider in your Org:



For default Scopes Give: openid profile email offline_access accounting.transactions accounting.contacts

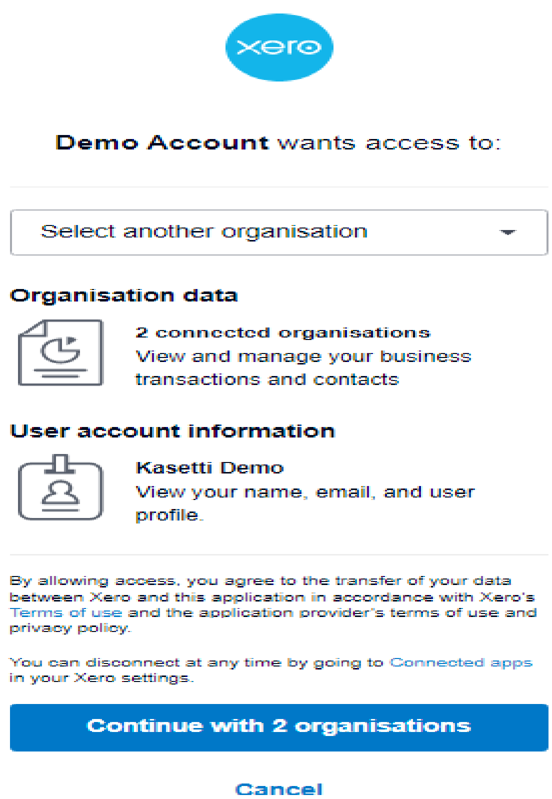
Consumer Key and Consumer Secret will be present in your xero account.

Create Named Credential in your Org:



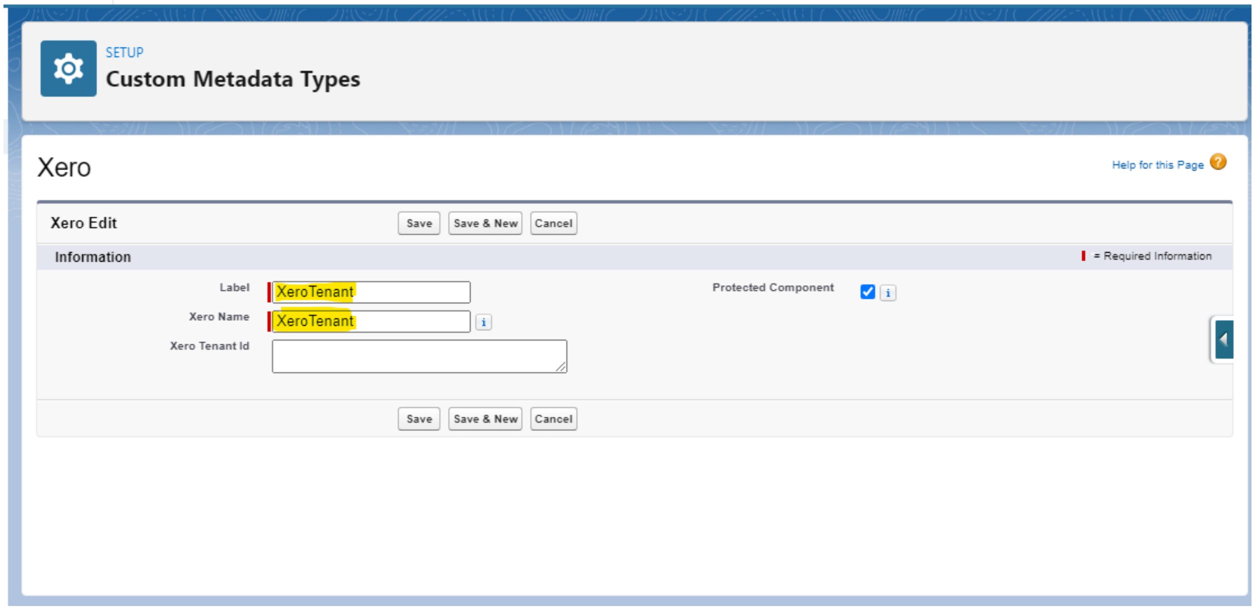
For authentication Provider point towards auth. Provider you created earlier for URL field provide this URL https://api.xero.com click save.

It will redirect to your Xero login page then select the org you wish to connect to Salesforce

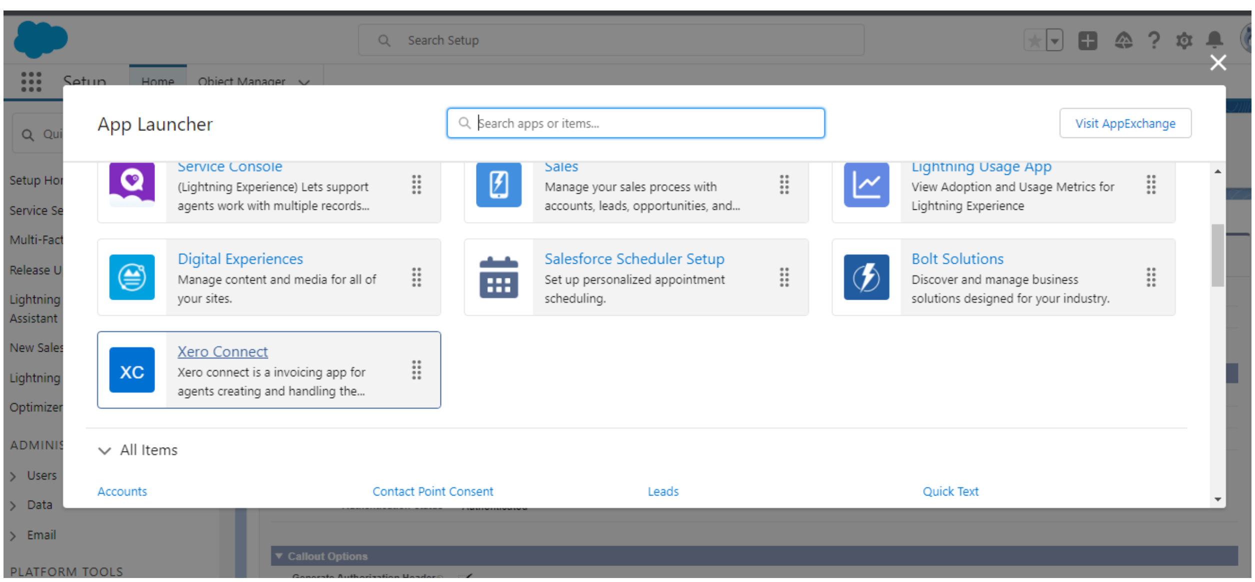


Update your Xero tenant ID in xero Custom Metadata:

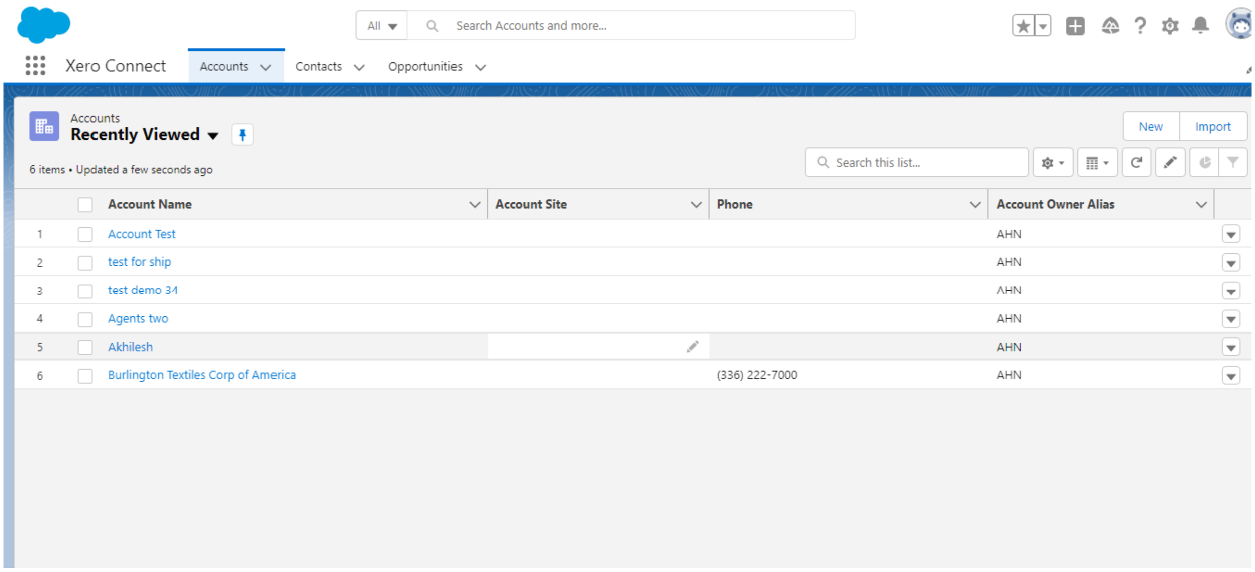
As shown in below image in Xero tenant Id field add your xero tenant Id and save.



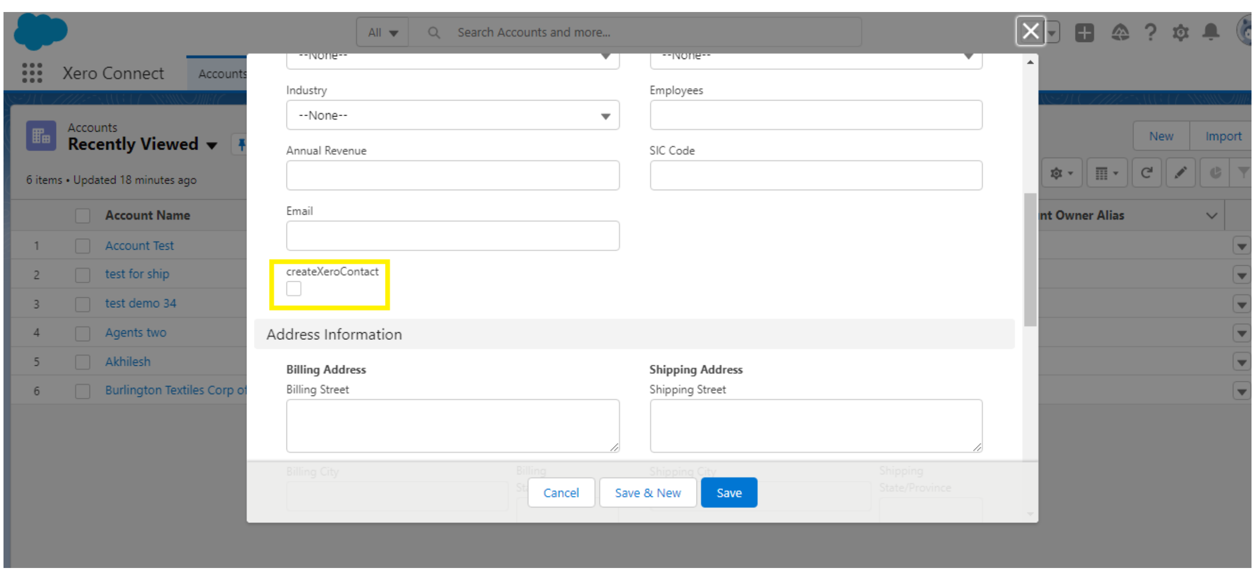
Once the setup is Completed You Can open the Xero Connect app from App launcher:



App Contains Account, Contact and Opportunity Tab:



While creating an Account record enable createXeroContact checkbox field, This will automatically create a contact for the account. Then create a Opportunity for that contact.



From Opportunity you can create Invoices for products in opportunityLineItem.

Before that you need to create a Xero contact first, Click on Xero Invoice action button on opportunity record page it will redirect it to Xero Connect tab where you can create a xero contact.

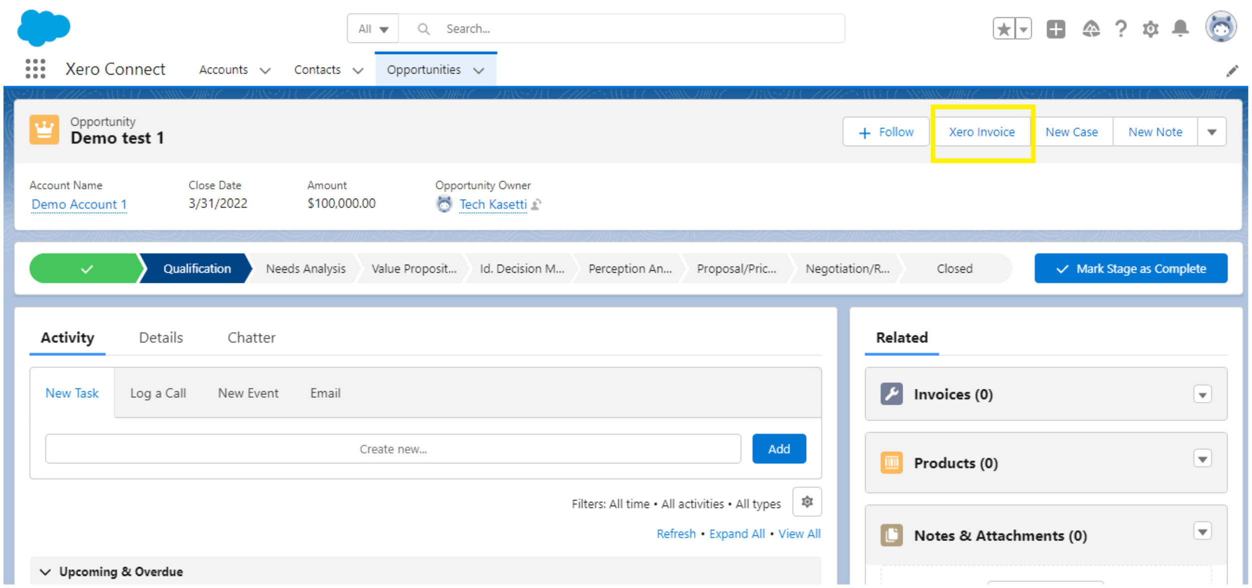


Fig (1)

If xero contact already present for the account new contact won’t be created if not new Xero contact will be created first. Here you can edit the address fields and email field.

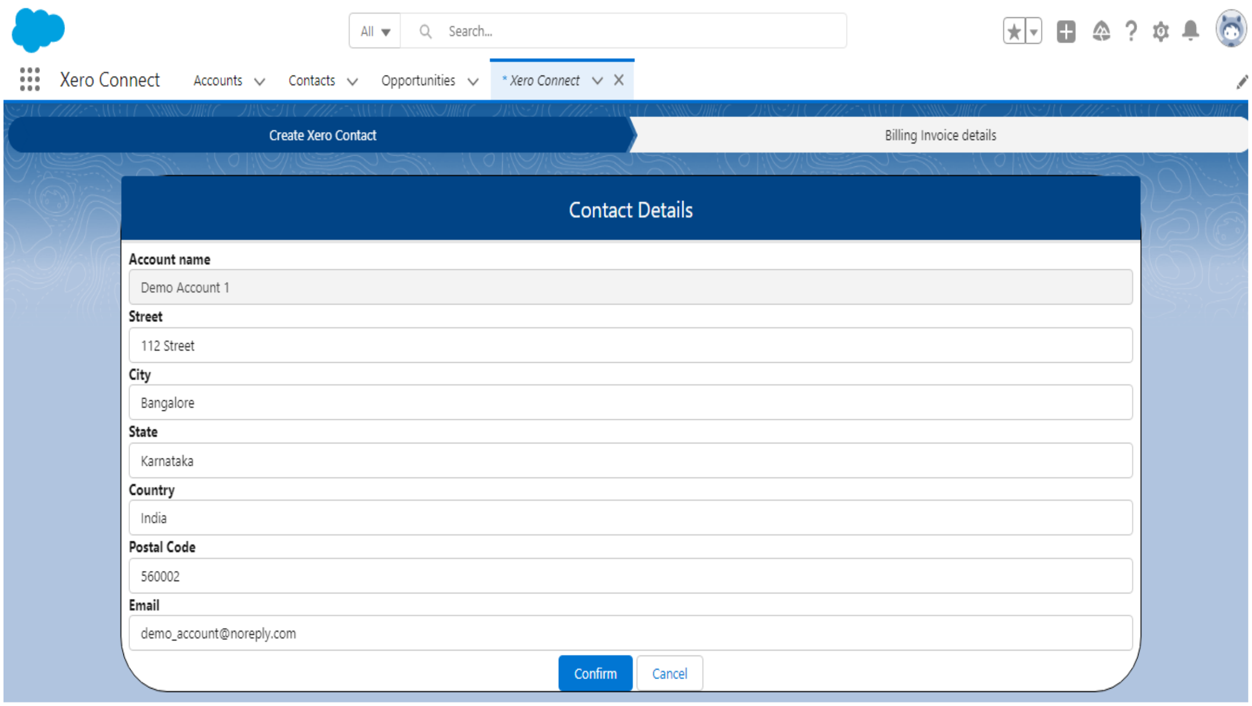


Fig (2)

On confirm new Xero contact will be created in Xero and Xero Contact Id will be received as response and updated in opportunity Object. Since now Xero Contact is created yo can create invoice for product by clicking on Xero Invoice Action button which will take you to Billing Invoice Page where you can edit your product quantity, Discount and also you can remove product from table.

To create Invoice add Products to Opportunity and click on Xero Invoice since Xero Contact already created earlier it will take you to invoice generation view. Refer Fig (3)

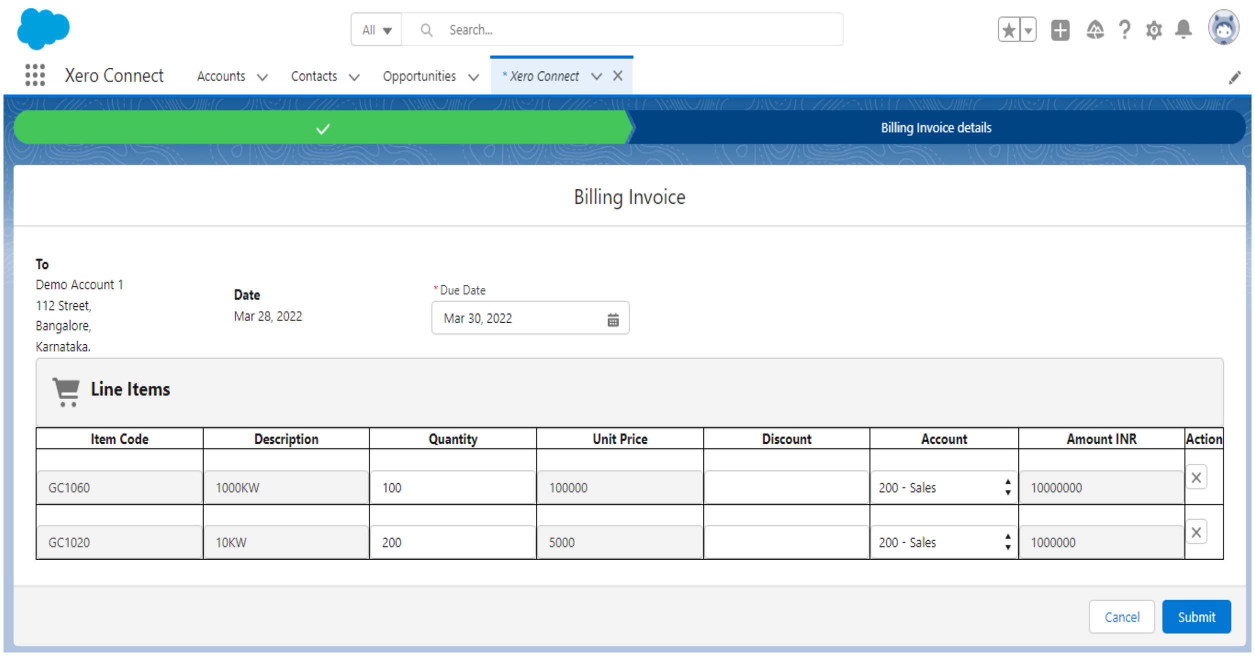


Fig (3)

On submit an invoice is generated and the same invoice is created instantly in Xero with the same invoice number.

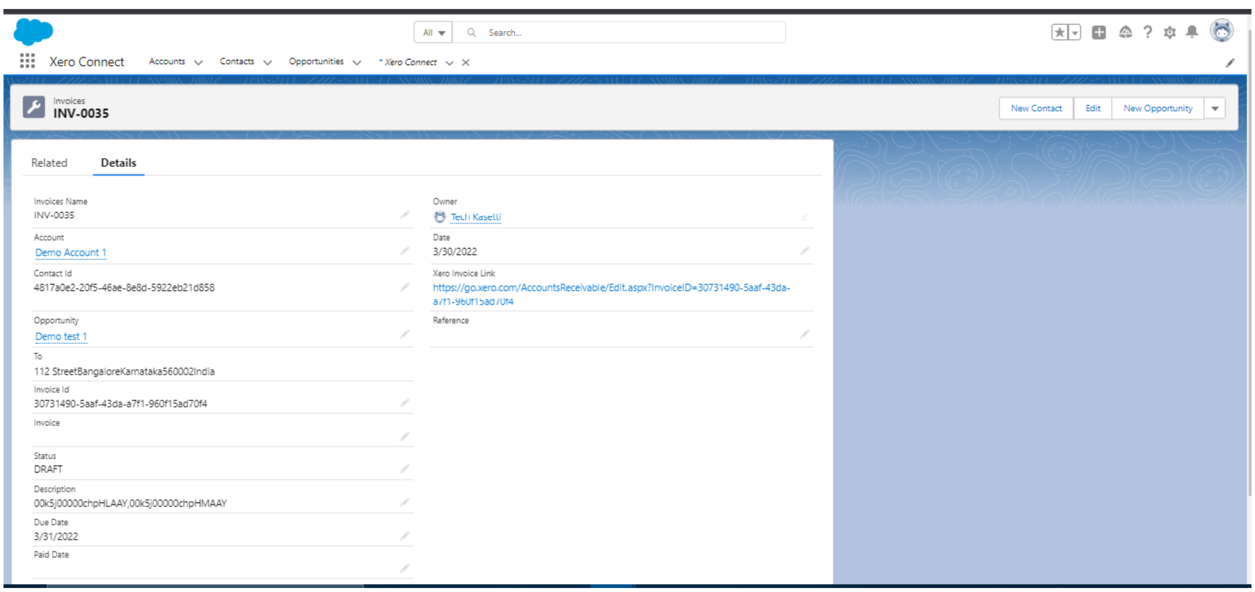
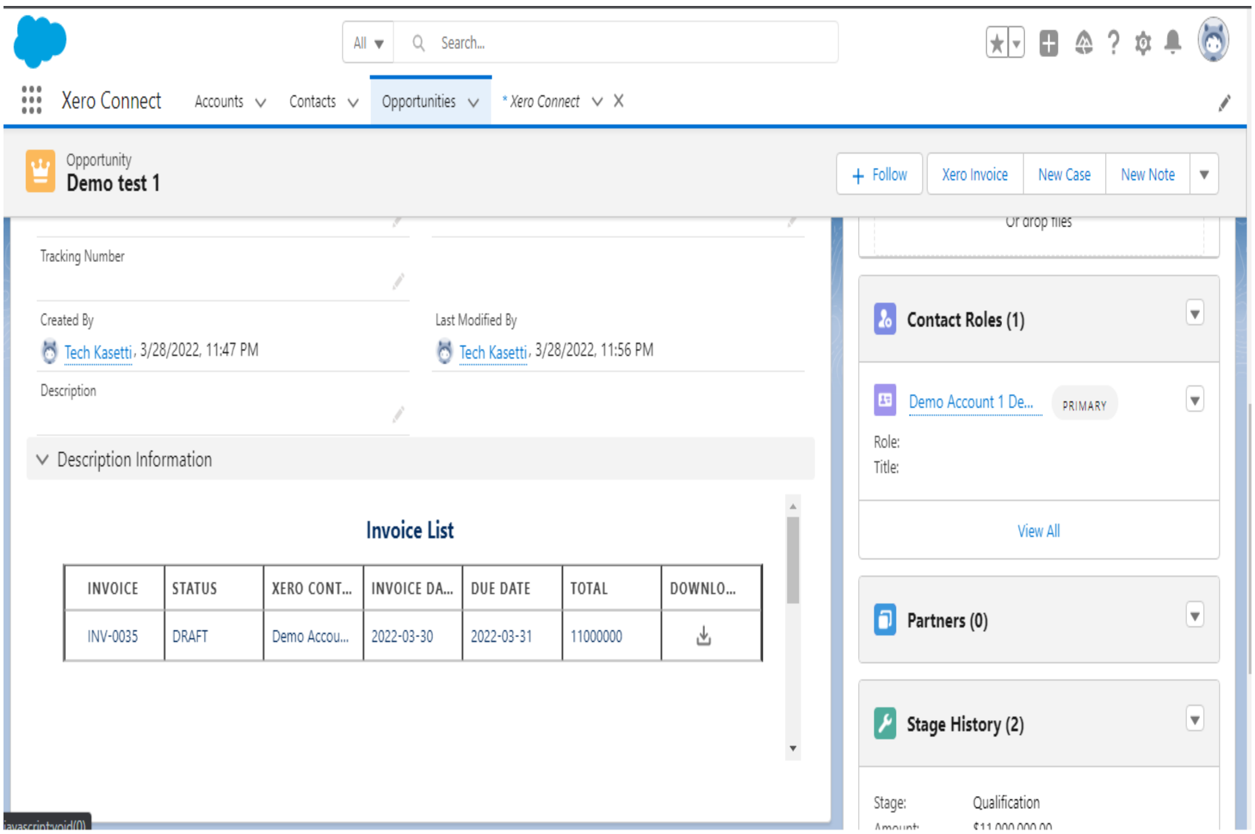


Fig (4)

After an Invoice is generated for a Product, An invoice table with invoice details will be displayed in Opportunity page layout which displays Invoice, Status, Xero Contact Name, Invoice Date, Due Date, Total Amount and option to download this Invoice in PDF format. Fig (5)

Here status of the invoice gets updated with status change in Xero, Initially when an invoice created default it's status is updated as Draft in Salesforce a schedule batch will be running which checks for any status change in xero if changed same will get updated in Salesforce.

Fig (5)



Preview of a Generated Invoice in PDF format which an user can download.

Invoice Preview

To	Demo Account 1 112 Street Bangalore - 560002 Karnataka India
Invoice Number	INV-0035
Date	Wed Mar 30 00:00:00 GMT 2022
Issued	Thu Mar 31 00:00:00 GMT 2022

Description	Quantity	Unit Price	Amount INR
GenWatt Diesel 10kW	200.00	5000.00	1000000.00
GenWatt Diesel 1000kW	100.00	100000.00	10000000.00

Total **11000000.00**

Fig (6)

THANK YOU