
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:

Install Xero Connect
By Kasetti Technologies

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

You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

☒ I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

[Install](#) [Cancel](#)

App Name	Publisher	Version Name	Version Number
Xero Connect	Kasetti Technologies	Beta v1.5	1.0 (Beta 8)

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

KT Xero Connect will now install in the selected Org

Install Xero Connect
By Kasetti Technologies

Installation Complete!

[Done](#)

App Name	Publisher	Version Name	Version Number
Xero Connect	Kasetti Technologies	Beta v1.5	1.0 (Beta 8)

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

1. Account Object (Select Installed package Layout)

The screenshot shows the Salesforce Setup interface for the Account Object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Edit Page Layout Assignment' for the 'Account' object. It includes a table of profiles and their assigned page layouts. A dropdown menu is open, showing the 'Page Layout To Use' selection. The selected option is 'Account Layout (Installed Package: Xero Connect)'. The table shows the following profiles and their current page layouts:

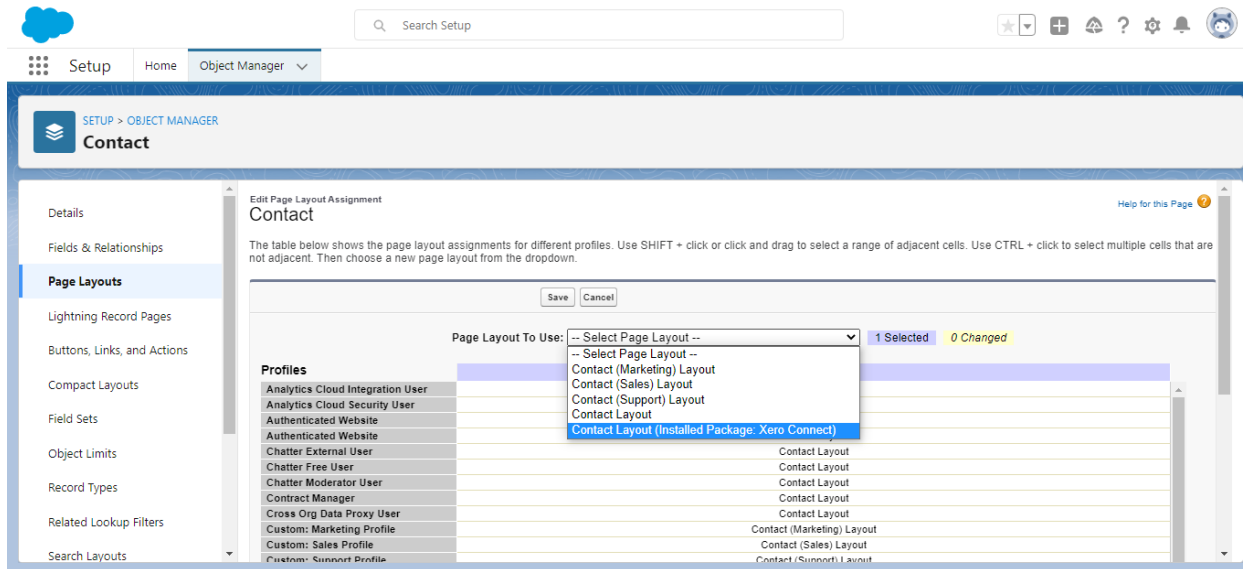
Profiles	Page Layout To Use
Analytics Cloud Integration User	Account Layout
Analytics Cloud Security User	Account Layout
Authenticated Website	Account Layout
Authenticated Website	Account Layout
Chatter External User	Account Layout
Chatter Free User	Account Layout
Chatter Moderator User	Account Layout
Contract Manager	Account Layout
Cross Org Data Proxy User	Account Layout
Custom: Marketing Profile	Account (Marketing) Layout
Custom: Sales Profile	Account (Sales) Layout
Custom: Support Profile	Account (Support) Layout

2. Opportunity Object (Select Installed package Layout)

The screenshot shows the Salesforce Setup interface for the Opportunity Object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Edit Page Layout Assignment' for the 'Opportunity' object. It includes a table of profiles and their assigned page layouts. A dropdown menu is open, showing the 'Page Layout To Use' selection. The selected option is 'Opportunity Layout (Installed Package: Xero Connect)'. The table shows the following profiles and their current page layouts:

Profiles	Page Layout To Use
Analytics Cloud Integration User	Opportunity Layout
Analytics Cloud Security User	Opportunity Layout
Authenticated Website	Opportunity Layout
Authenticated Website	Opportunity Layout
Chatter External User	Opportunity Layout
Chatter Free User	Opportunity Layout
Chatter Moderator User	Opportunity Layout
Contract Manager	Opportunity Layout
Cross Org Data Proxy User	Opportunity Layout
Custom: Marketing Profile	Opportunity (Marketing) Layout
Custom: Sales Profile	Opportunity (Sales) Layout
Custom: Support Profile	Opportunity (Support) Layout

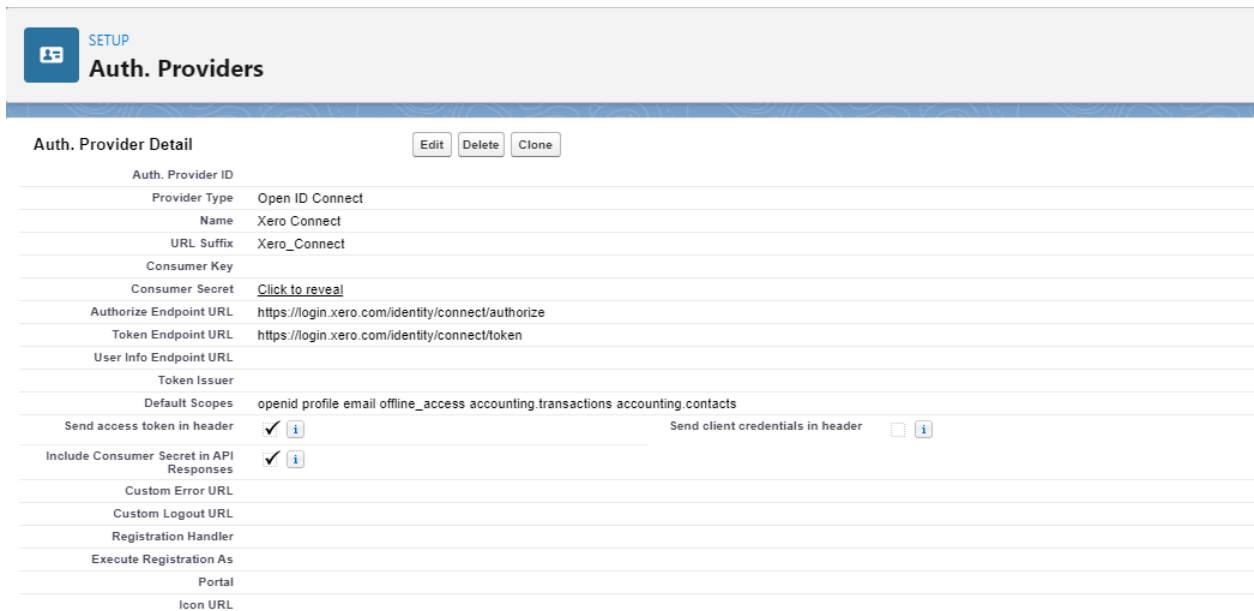
3. Contact Object (Select Installed package Layout)



The screenshot shows the Salesforce Setup interface, specifically the 'Object Manager' section for the 'Contact' object. The 'Page Layouts' tab is selected in the left sidebar. The main area displays a table of page layout assignments for various profiles. A dropdown menu is open, showing the selection of 'Contact Layout (Installed Package: Xero Connect)' from the 'Page Layout To Use' column. The table lists profiles such as 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Chatter External User', 'Chatter Free User', 'Chatter Moderator User', 'Contract Manager', 'Cross Org Data Proxy User', 'Custom: Marketing Profile', 'Custom: Sales Profile', and 'Custom: Support Profile'. The 'Contact Layout' is assigned to most of these profiles.

Profiles	Page Layout To Use
Analytics Cloud Integration User	Contact Layout
Analytics Cloud Security User	Contact Layout
Authenticated Website	Contact Layout
Chatter External User	Contact Layout
Chatter Free User	Contact Layout
Chatter Moderator User	Contact Layout
Contract Manager	Contact Layout
Cross Org Data Proxy User	Contact Layout
Custom: Marketing Profile	Contact (Marketing) Layout
Custom: Sales Profile	Contact (Sales) Layout
Custom: Support Profile	Contact (Support) Layout

Create an Auth. Provider in your Org:



The screenshot shows the 'Auth. Providers' section in Salesforce Setup. The 'Auth. Provider Detail' for 'Xero Connect' is displayed. The details include the Provider Type, Name, URL Suffix, Consumer Key, Consumer Secret, Authorize Endpoint URL, Token Endpoint URL, User Info Endpoint URL, Token Issuer, Default Scopes, and various checkboxes for sending access tokens, client credentials, and including consumer secrets in API responses.

Auth. Provider Detail	
Auth. Provider ID	
Provider Type	Open ID Connect
Name	Xero Connect
URL Suffix	Xero_Connect
Consumer Key	
Consumer Secret	Click to reveal
Authorize Endpoint URL	https://login.xero.com/identity/connect/authorize
Token Endpoint URL	https://login.xero.com/identity/connect/token
User Info Endpoint URL	
Token Issuer	
Default Scopes	openid profile email offline_access accounting.transactions accounting.contacts
Send access token in header	☒
Send client credentials in header	☐
Include Consumer Secret in API Responses	☒
Custom Error URL	
Custom Logout URL	
Registration Handler	
Execute Registration As	
Portal	
Icon URL	

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:

SETUP
Named Credentials

Specify the callout endpoint's URL and the authentication settings that are required for Salesforce to make callouts to the remote system.

[Back to Named Credentials](#)

Label	Name	URL
Xero	Xero	https://api.xero.com

Authentication

Certificate

Identity Type: Named Principal

Authentication Protocol: OAuth 2.0

Authentication Provider: Xero Connect

Scope:

Authentication Status: Authenticated

Callout Options

Generate Authorization Header: ☒

Allow Merge Fields in HTTP Header: ☐

Allow Merge Fields in HTTP Body: ☐

Outbound Network Connection:

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

xero

Demo Account wants access to:

Select another organisation

Organisation data

 **2 connected organisations**
View and manage your business transactions and contacts

User account information

 **Kasetti Demo**
View your name, email, and user profile.

By allowing access, you agree to the transfer of your data between Xero and this application in accordance with Xero's [Terms of use](#) and the application provider's terms of use and privacy policy.

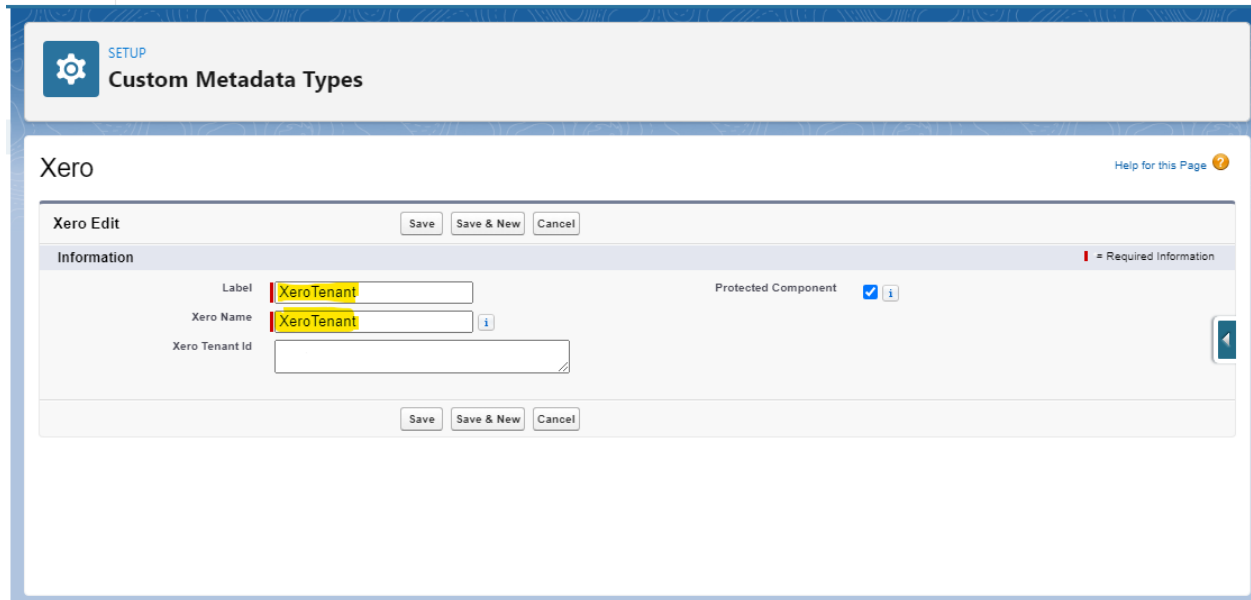
You can disconnect at any time by going to [Connected apps](#) in your Xero settings.

Continue with 2 organisations

Cancel

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.

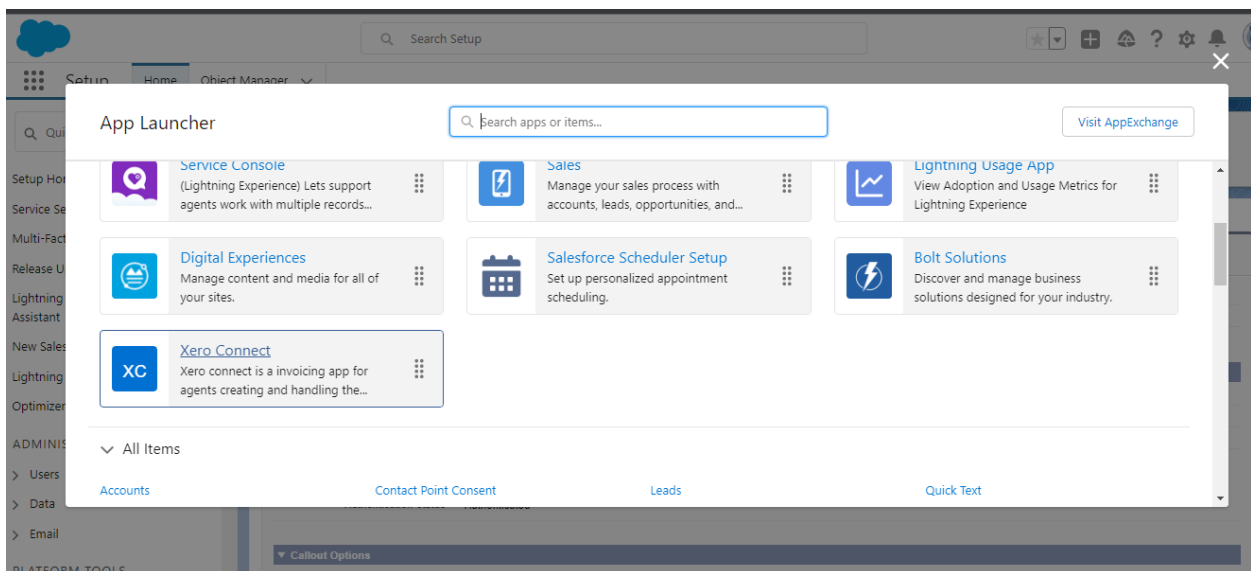


The screenshot shows the Salesforce 'Custom Metadata Types' page for the 'Xero' type. The 'Xero Edit' form is displayed with the following fields:

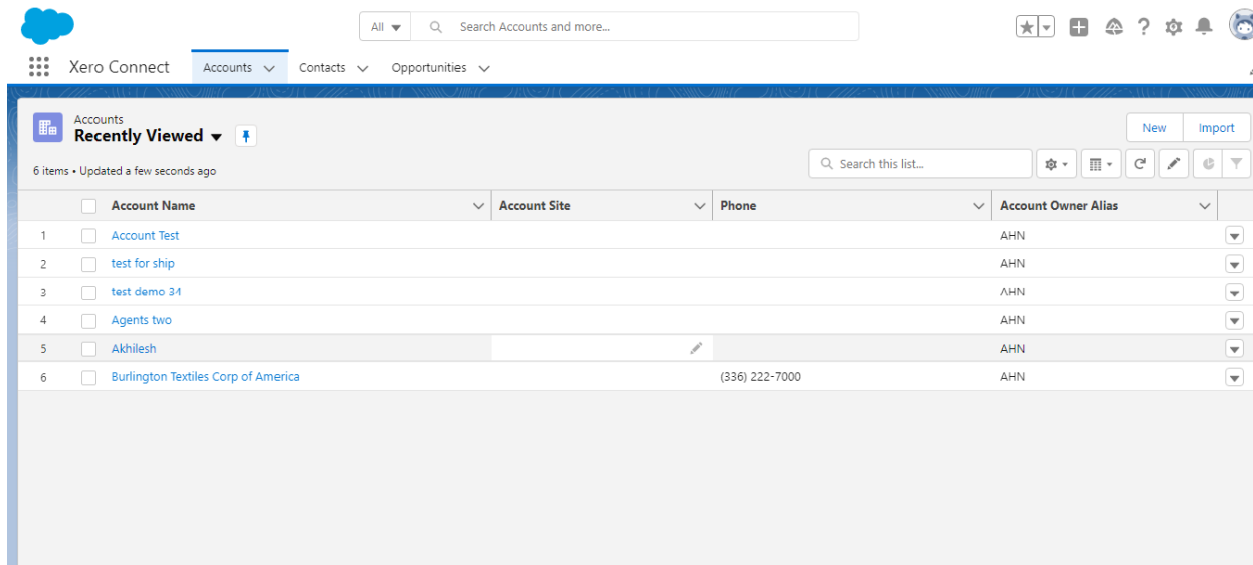
- Label:** XeroTenant
- Xero Name:** XeroTenant
- Xero Tenant Id:** (Empty text field)
- Protected Component:** ☒

Buttons at the top of the form include 'Save', 'Save & New', and 'Cancel'. A 'Help for this Page' link is visible in the top right corner.

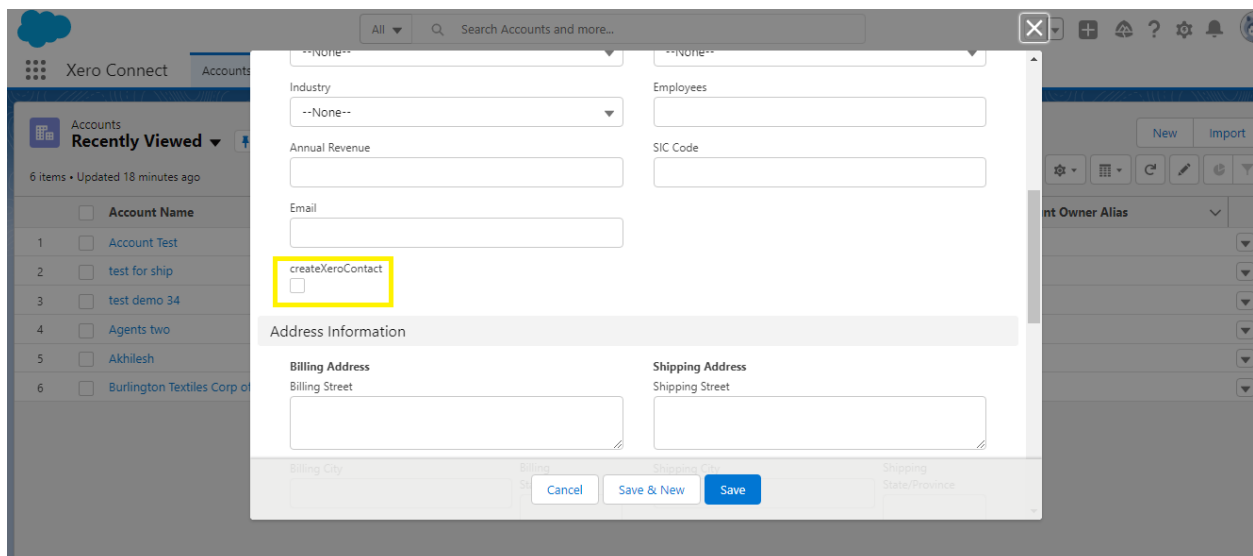
Once the setup is Completed You Can open the Xero Connect app from App launcher:



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.

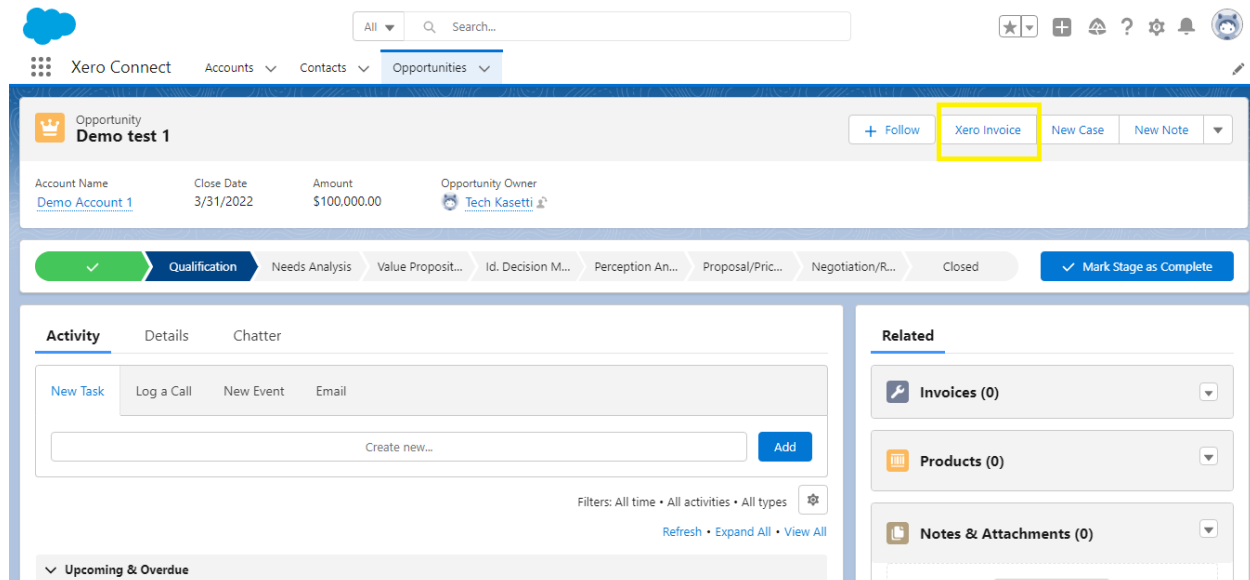


Fig (1)

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.

The screenshot shows the 'Contact Details' form in the Xero Connect interface. The form is titled 'Contact Details' and is part of the 'Create Xero Contact' process. It contains the following fields:

- Account name:** Demo Account 1
- Street:** 112 Street
- City:** Bangalore
- State:** Karnataka
- Country:** India
- Postal Code:** 560002
- Email:** demo_account@noreply.com

At the bottom of the form, there are two buttons: 'Confirm' and 'Cancel'.

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)

Billing Invoice details

Billing Invoice

To
Demo Account 1
112 Street,
Bangalore,
Karnataka.

Date
Mar 28, 2022

*** Due Date**
Mar 30, 2022

Line Items

Item Code	Description	Quantity	Unit Price	Discount	Account	Amount INR	Action
GC1060	1000KW	100	100000		200 - Sales	10000000	X
GC1020	10KW	200	5000		200 - Sales	1000000	X

Cancel Submit

Fig (3)

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

Invoices
INV-0035

New Contact Edit New Opportunity

Related Details

Invoices Name	Account	Contact Id	Opportunity	To	Invoice Id	Invoice	Status	Description	Due Date	Paid Date
INV-0035	Demo Account 1	4817a0e2-20f5-46ae-8e8d-5922eb21d858	Demo test 1	112 StreetBangaloreKarnataka560002India	30731490-5aaf-43da-a7f1-960f15ad70f4		DRAFT	00kSj000000chpHLAAy,00kSj000000chpHMAAY	3/31/2022	

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)

The screenshot displays the Salesforce interface for an Opportunity record titled "Demo test 1". The top navigation bar includes "Xero Connect", "Accounts", "Contacts", and "Opportunities". The right sidebar shows "Contact Roles (1)", "Partners (0)", and "Stage History (2)". The main content area includes fields for "Tracking Number", "Created By" (Tech Kasetti, 3/28/2022, 11:47 PM), "Last Modified By" (Tech Kasetti, 3/28/2022, 11:56 PM), and "Description". Below these fields is an "Invoice List" table.

INVOICE	STATUS	XERO CONT...	INVOICE DA...	DUE DATE	TOTAL	DOWNLO...
INV-0035	DRAFT	Demo Accou...	2022-03-30	2022-03-31	11000000	Download

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