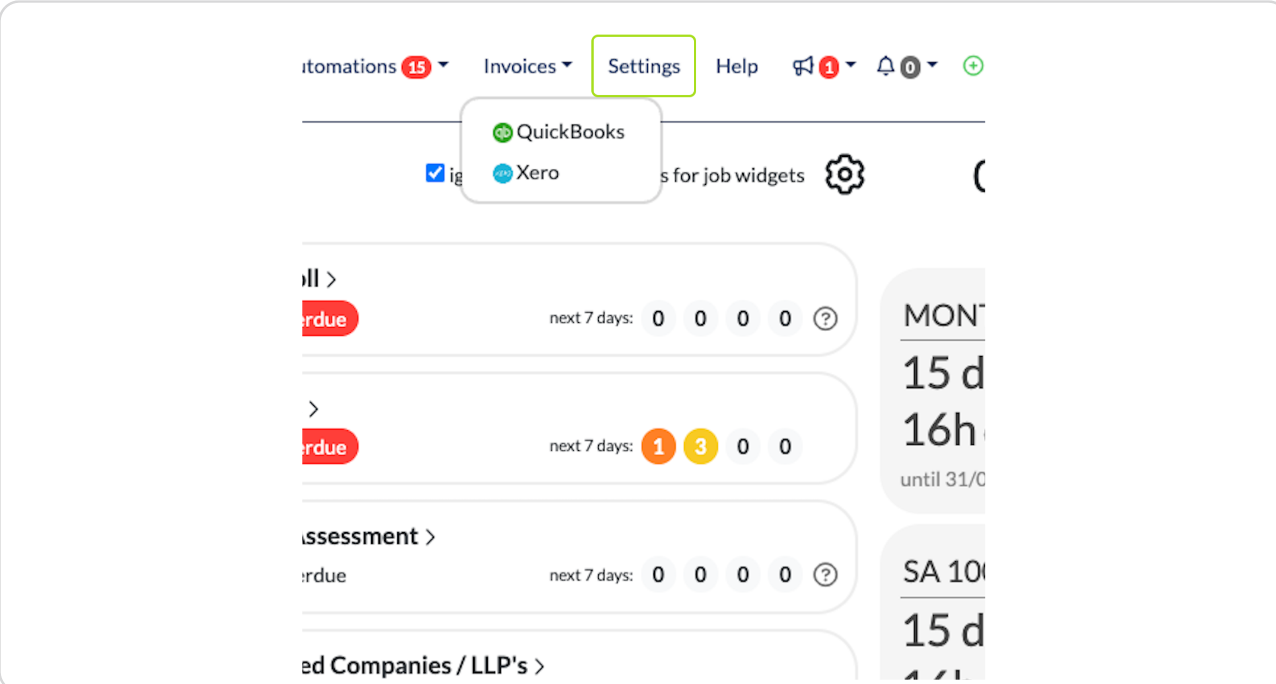
Using Xero in Client Engager

28 Steps   [View most recent version on Tango.us]

Created by	Creation Date	Last Updated
Johann Goree	January 16, 2024	January 16, 2024

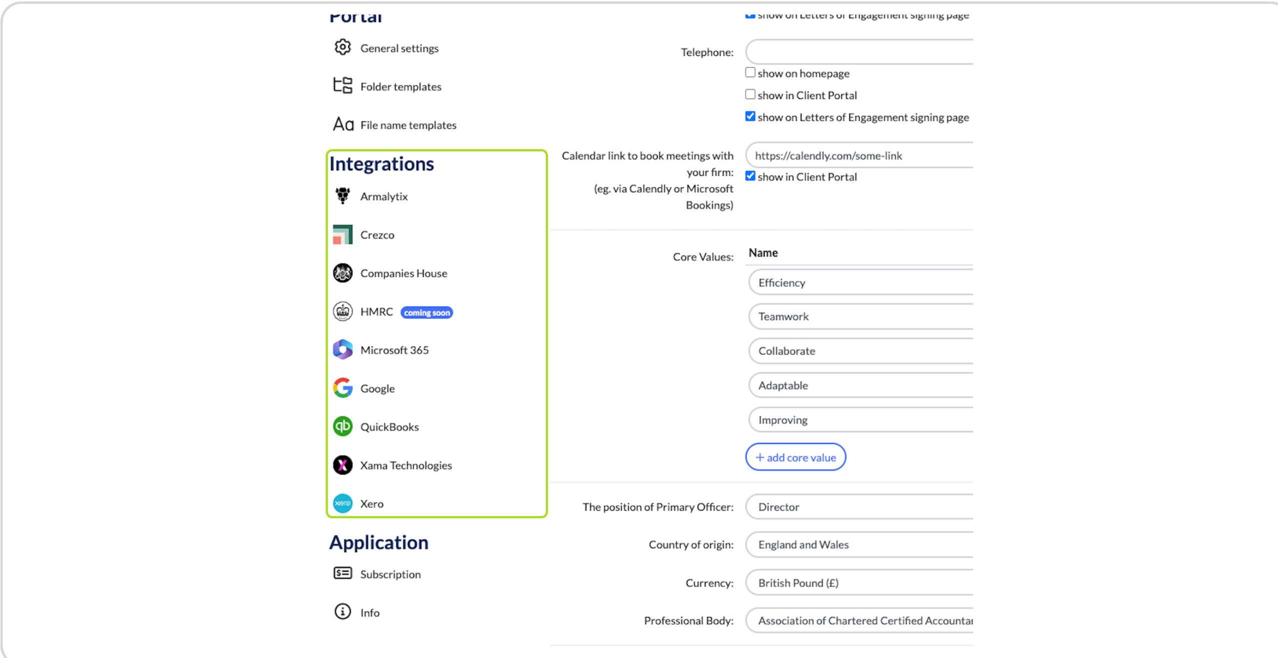
STEP 1

To link xero to Client Engager - Click on Settings



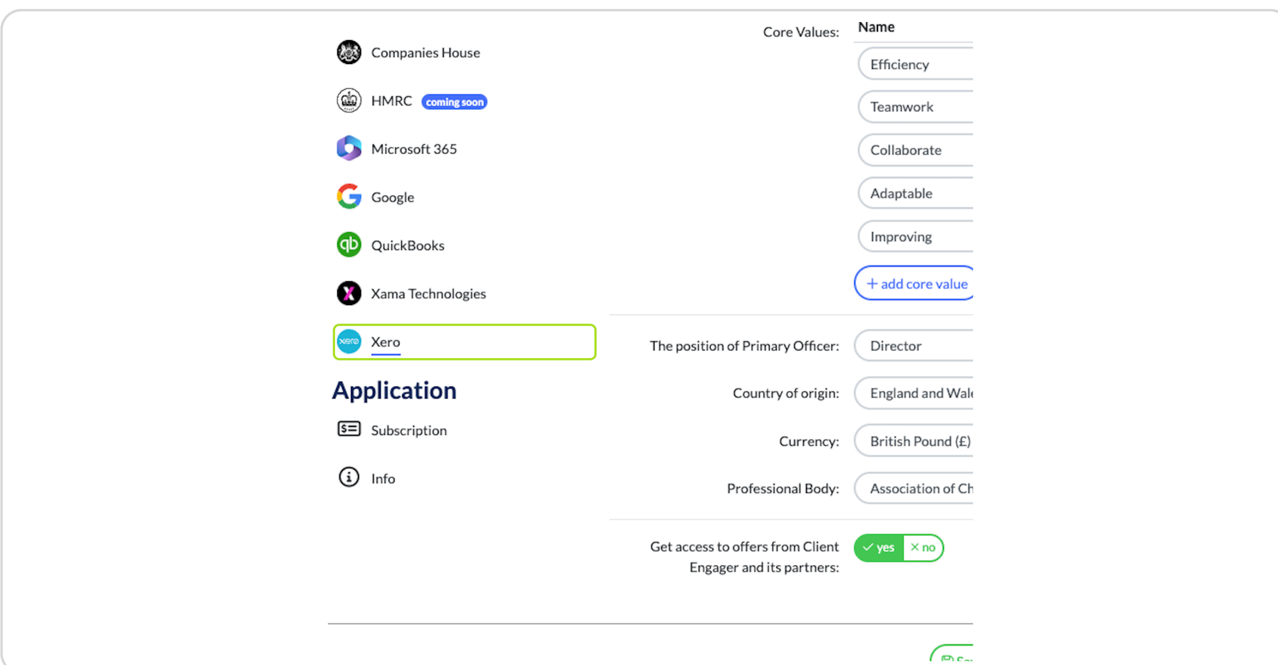
STEP 2

Go on Integrations...



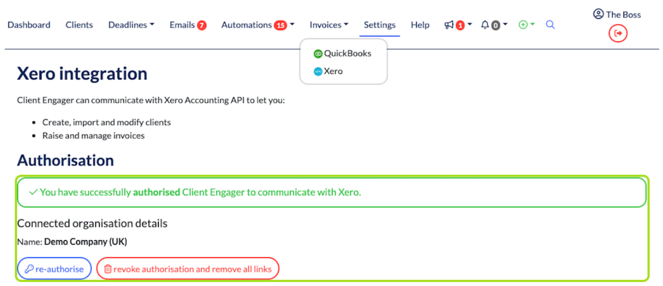
STEP 3

Click on Xero



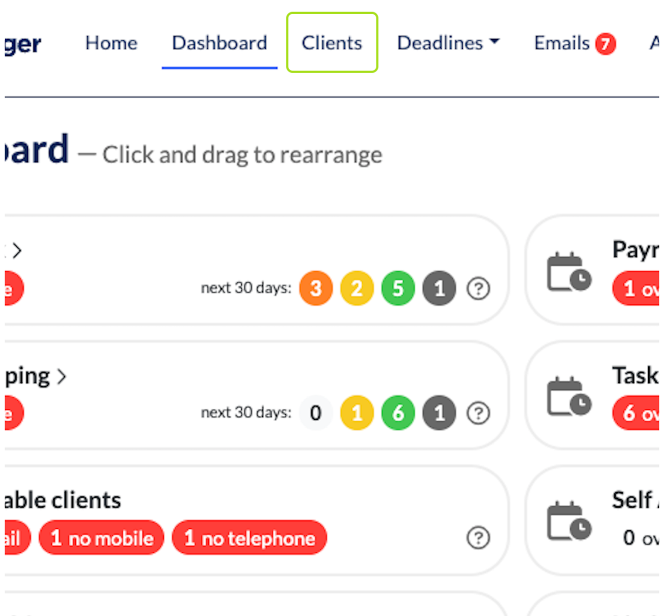
STEP 4

Click on Authorise Xero, this takes you to the Xero login screen and workflow



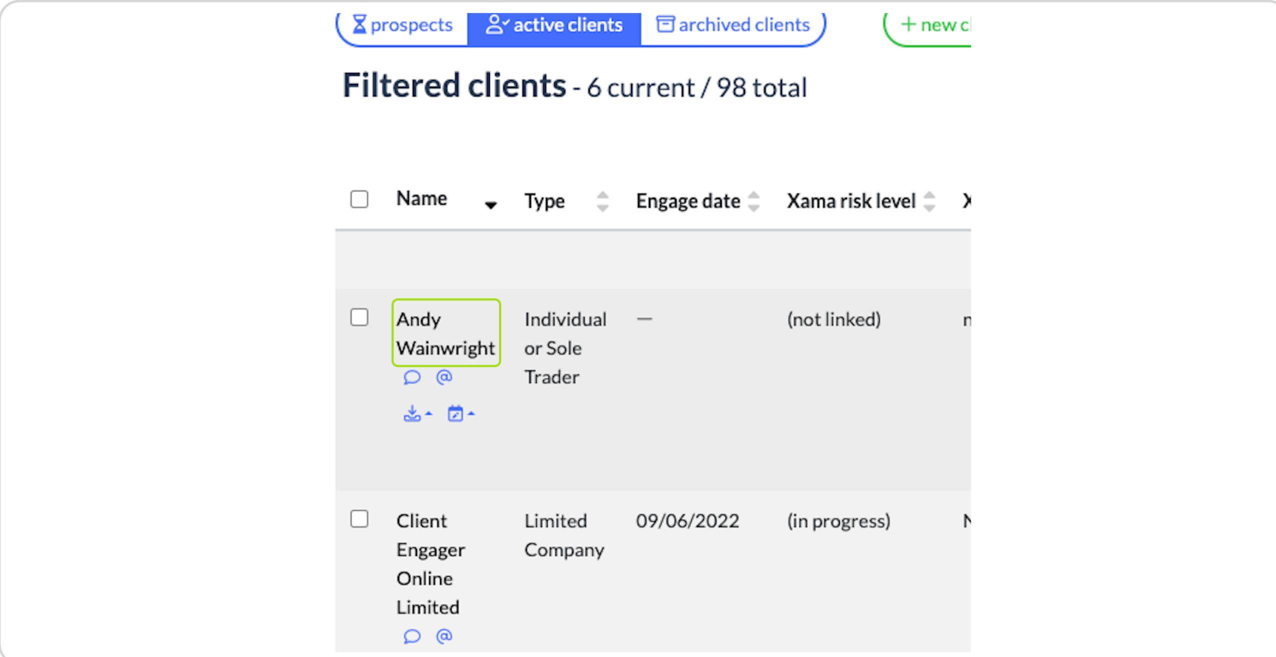
STEP 5

To link a client from Client Engager to Xero Click on Clients



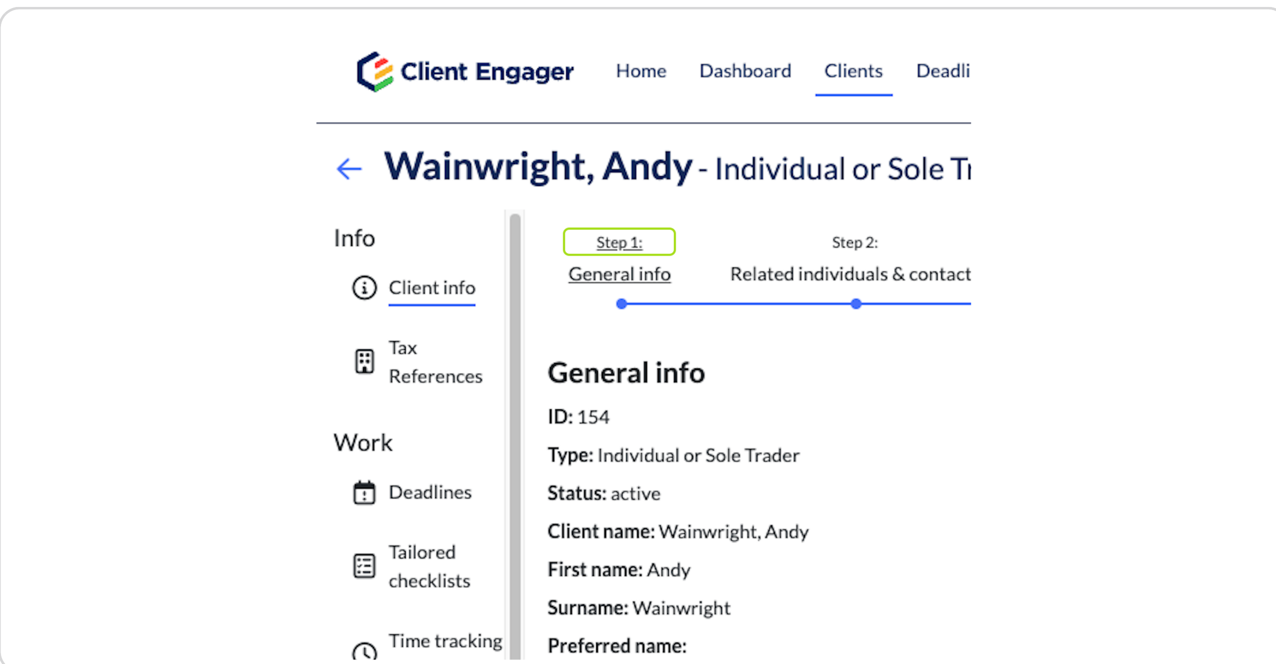
STEP 6

Click on the client



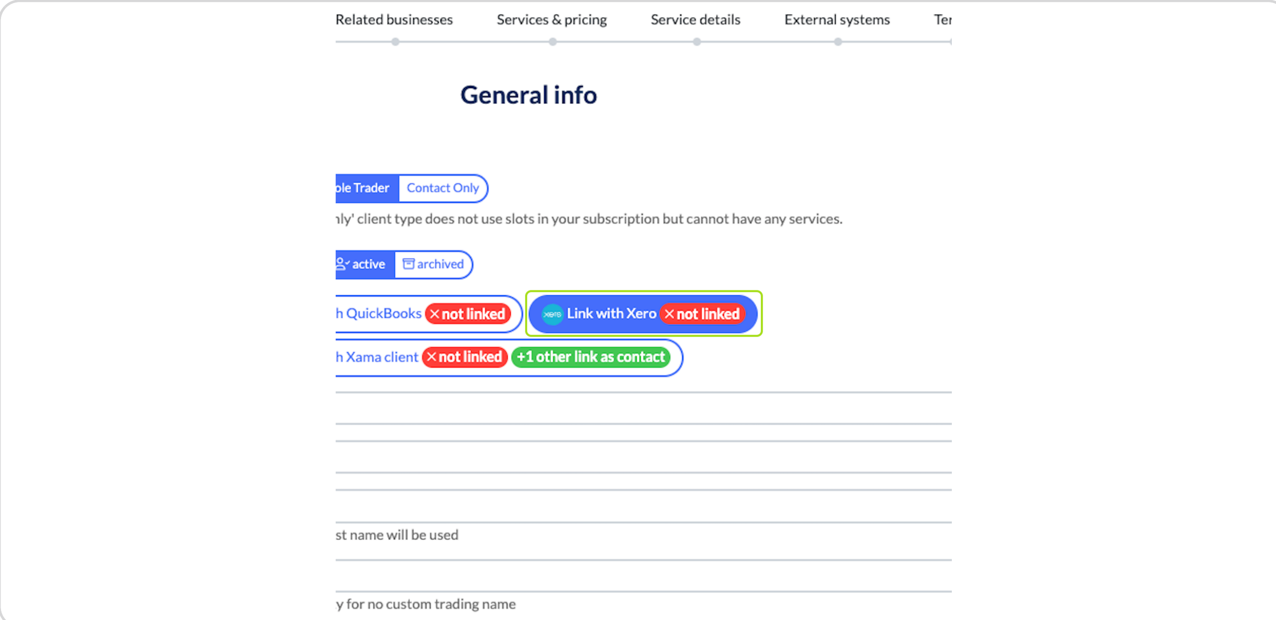
STEP 7

Click on Step 1:



STEP 8

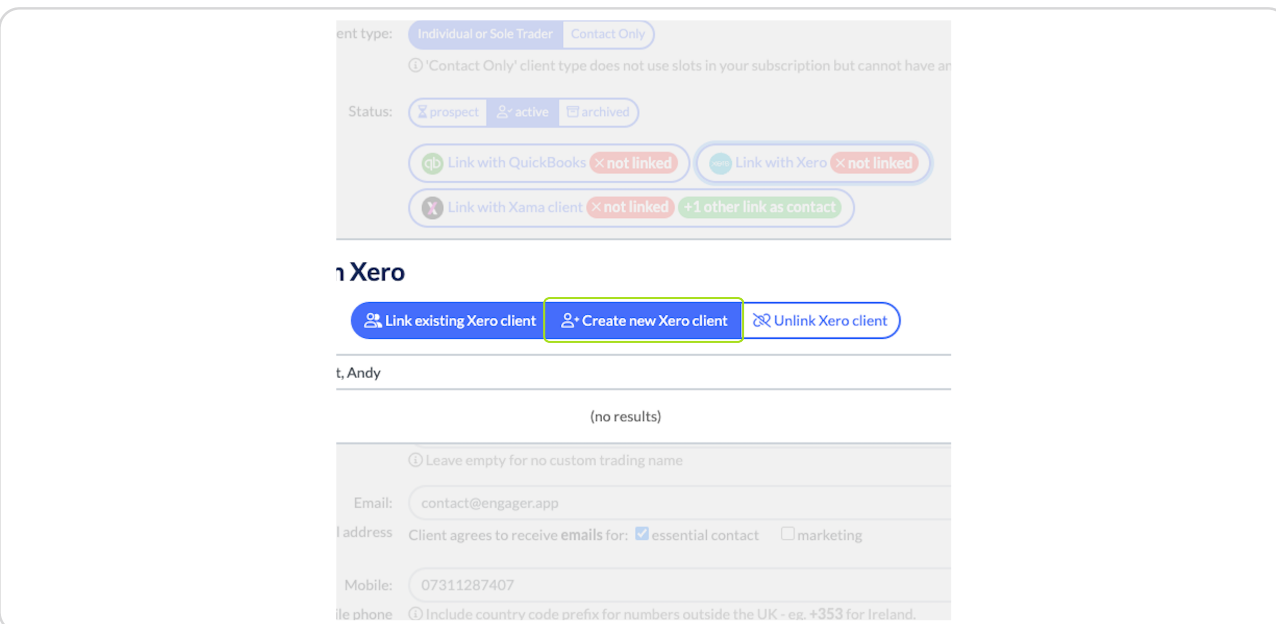
Click on Link with Xero



STEP 9

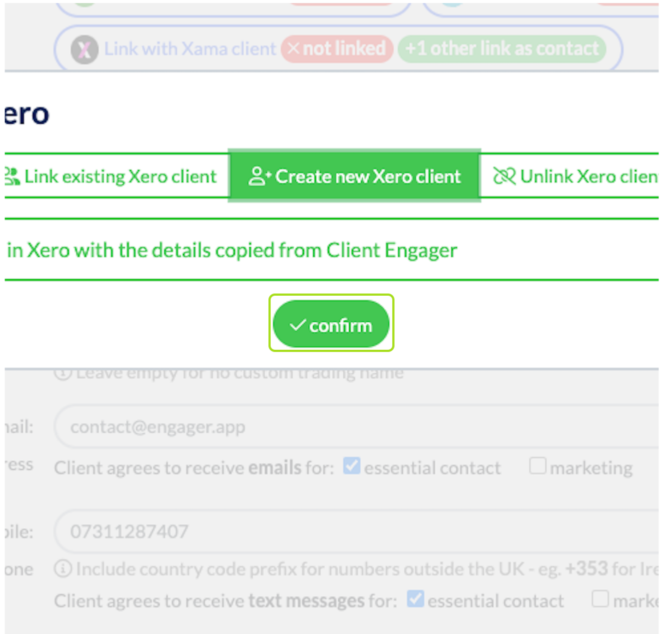
Decided if you are matching, creating a new or unlinking from Xero

If linking you will search the Xero customer list for a match, if adding a new record Client Engager will create a new customer record in Xero and link to it.



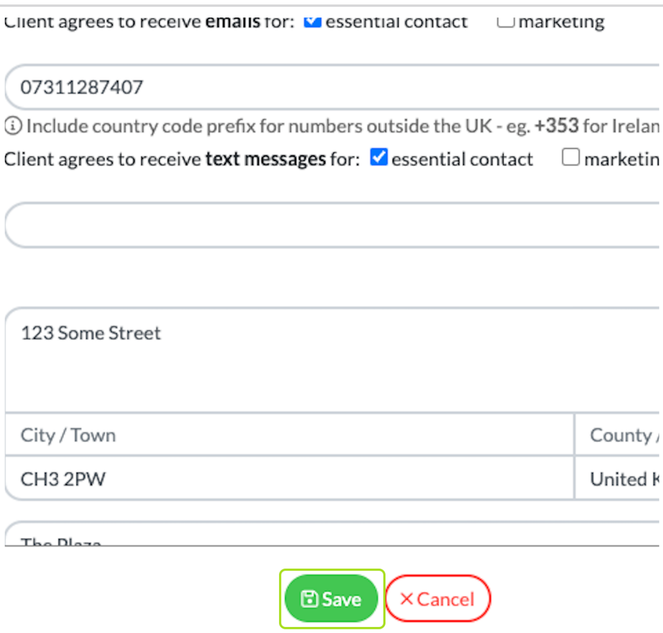
STEP 10

Click on confirm to link or add the customer to Xero



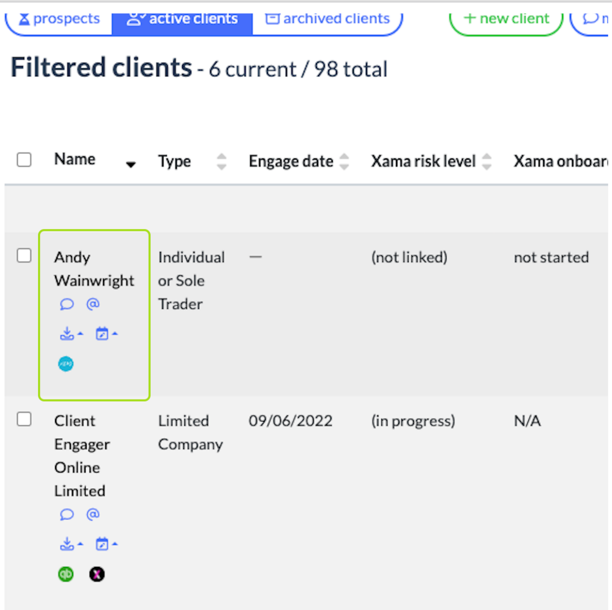
STEP 11

Click on Save



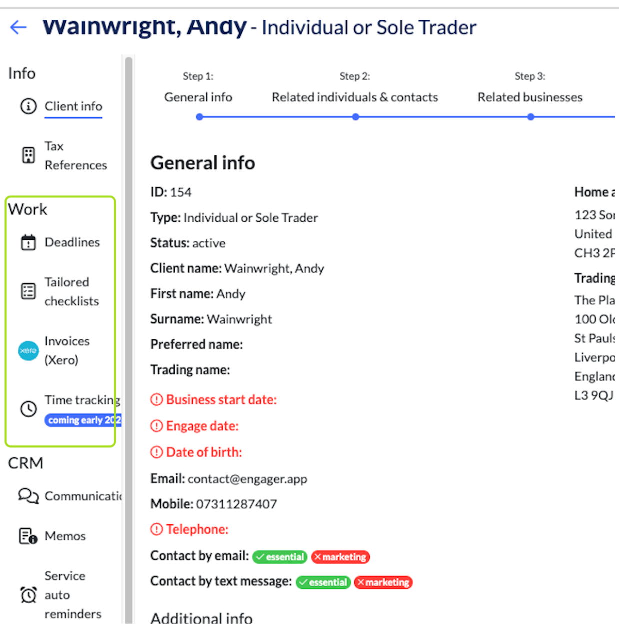
STEP 12

You will see from the client list if a client is linked to Xero record because theres a Xero icon



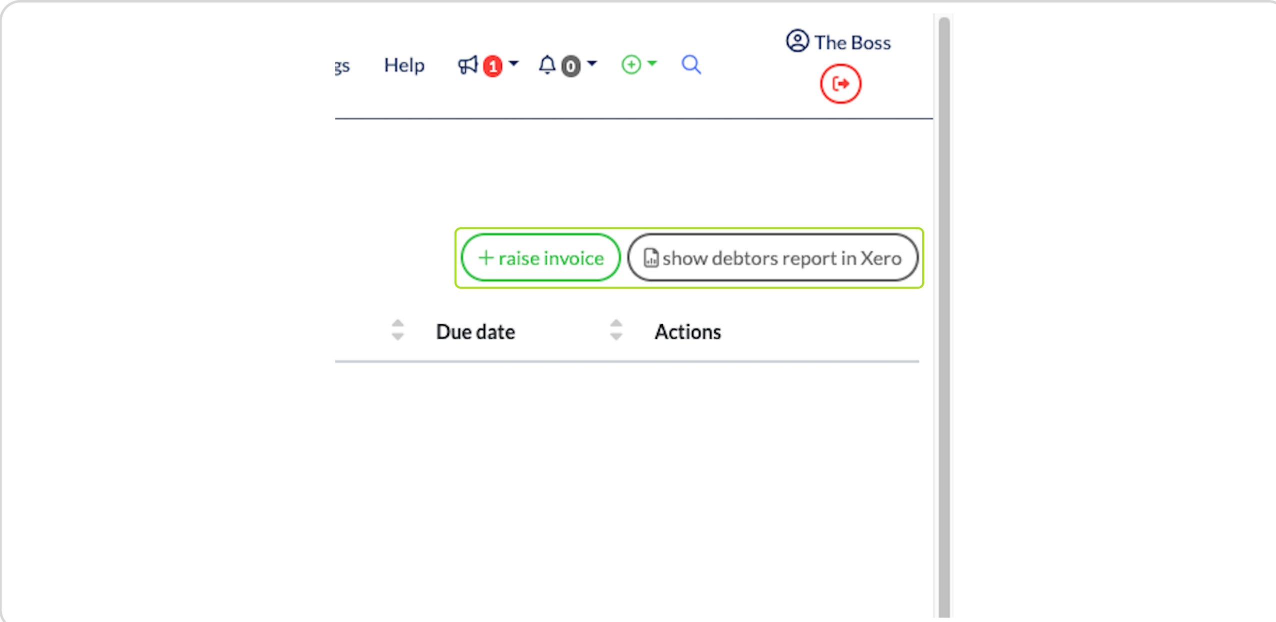
STEP 13

A new left hand menu item will also appear where you can click to view the customers invoice history



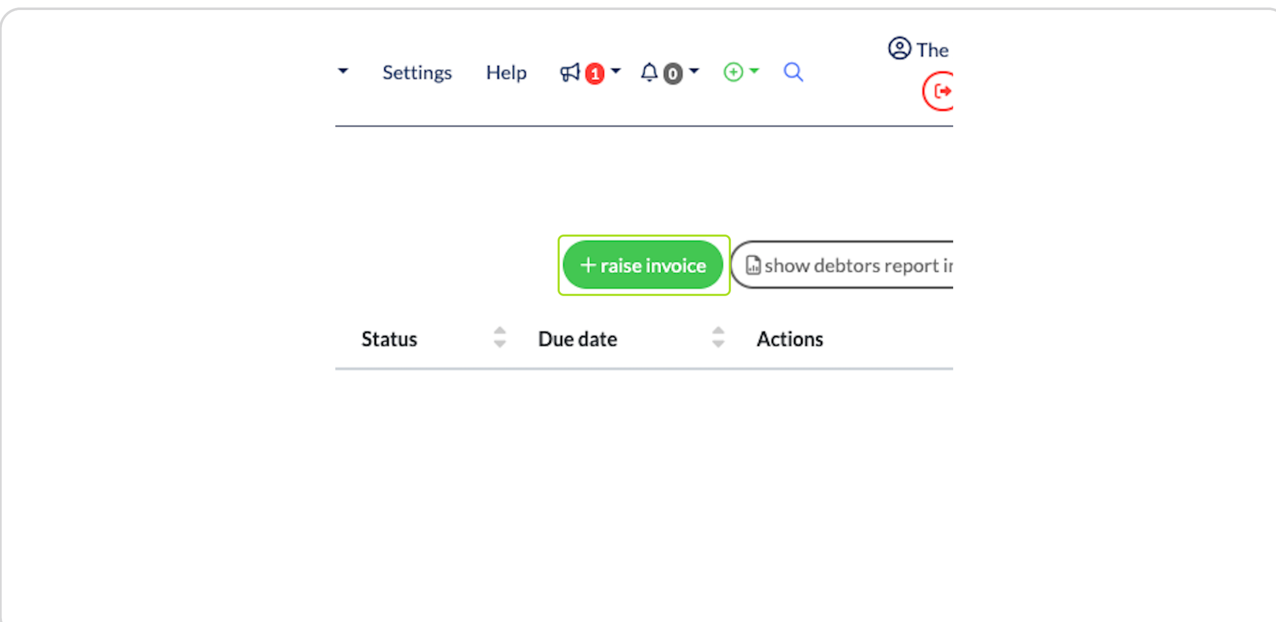
STEP 14

On entering the invoice history view you can create a new invoice that will be pushed to Xero via the API or click to access the debtors report which will open a new window and Xero



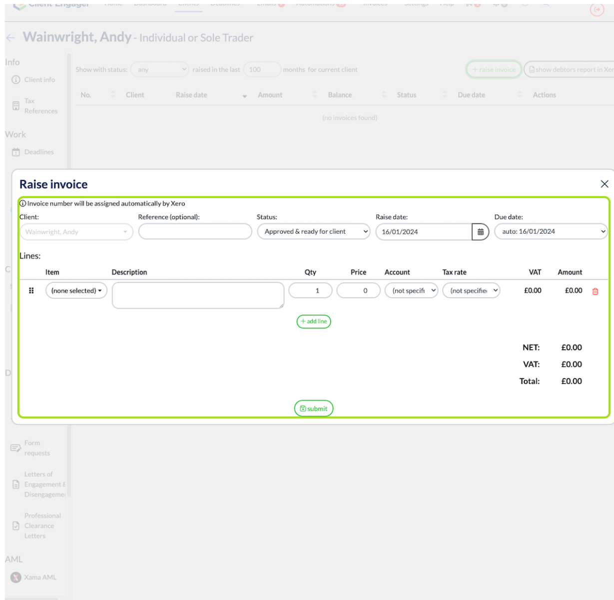
STEP 15

To raise an Invoice from Client Engager to Xero Click on raise invoice



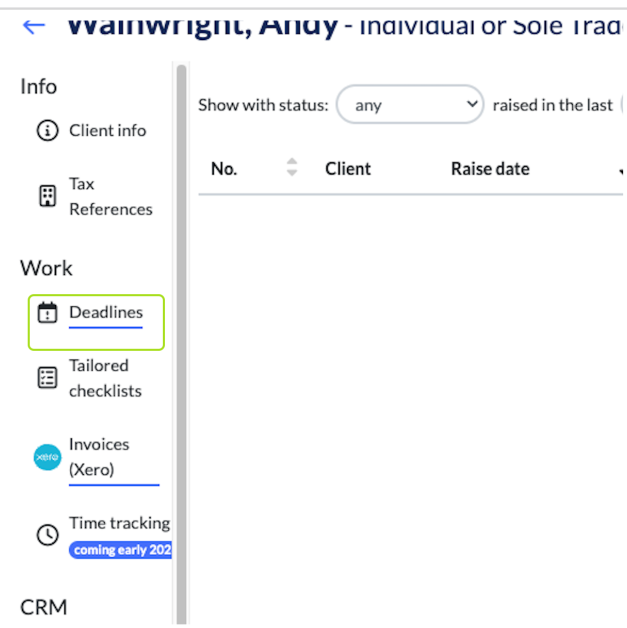
STEP 16

Enter the invoice data, the Invoice number will be assigned automatically by Xero



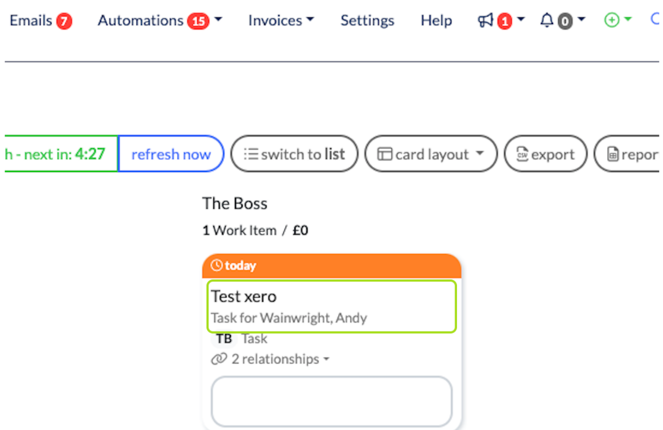
STEP 17

You can also raise or link invoices via specific deadlines to do this Click on Deadlines



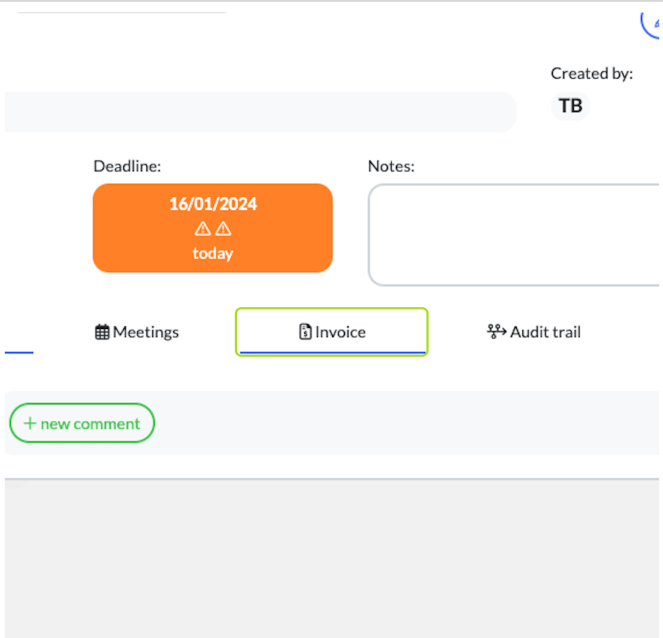
STEP 18

Click on the task you whish to invoice for



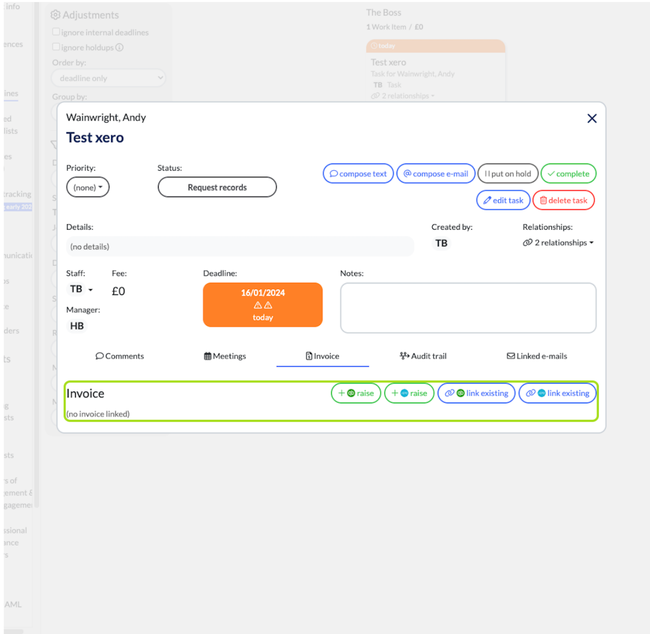
STEP 19

Click on Invoice tab



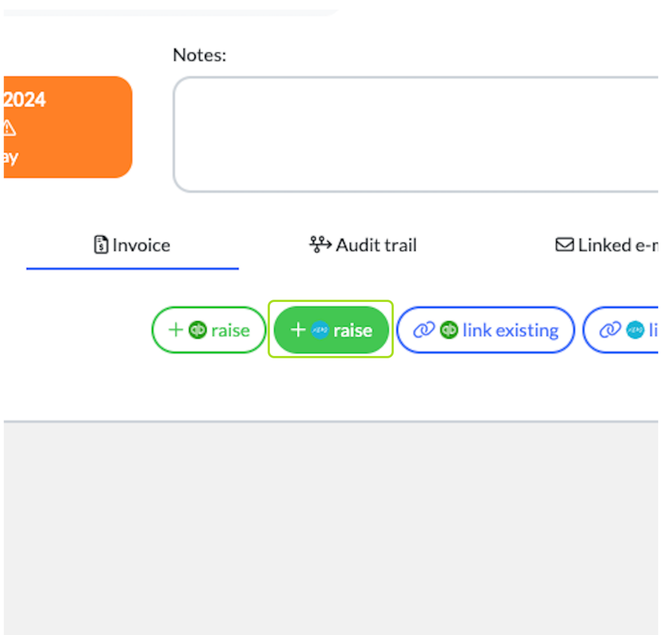
STEP 20

Click on the option you require, link or add invoice



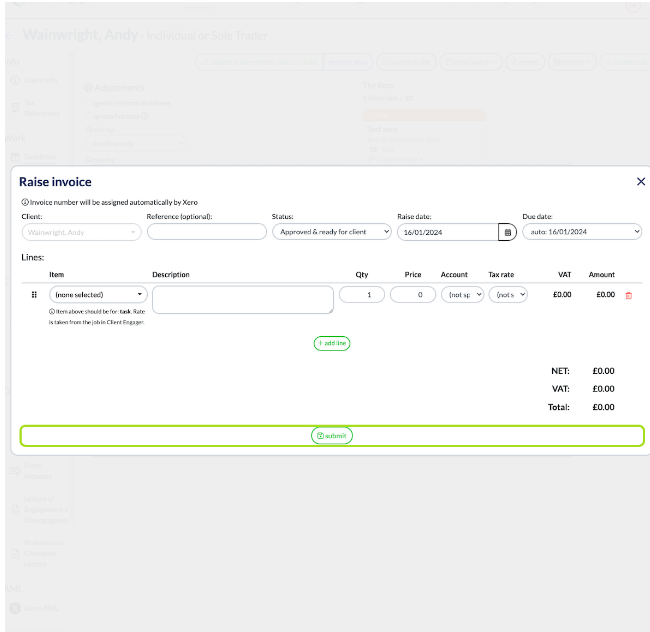
STEP 21

to create an invoice Click on raise



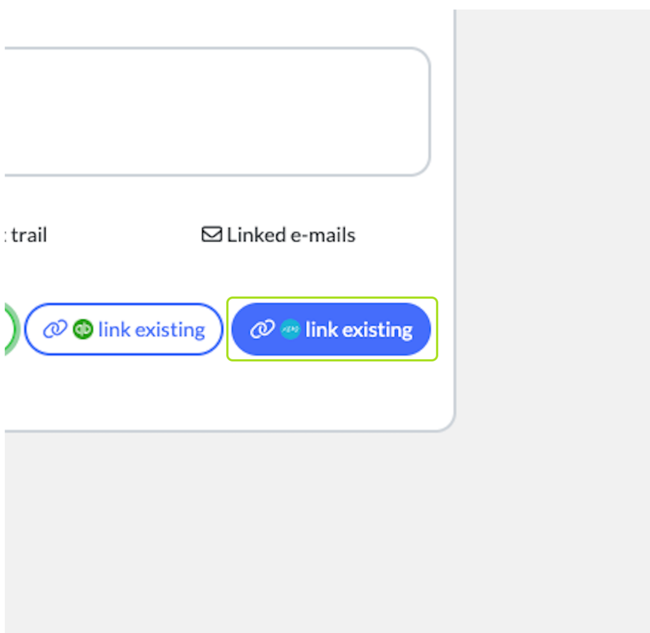
STEP 22

enter the details and Click on submit



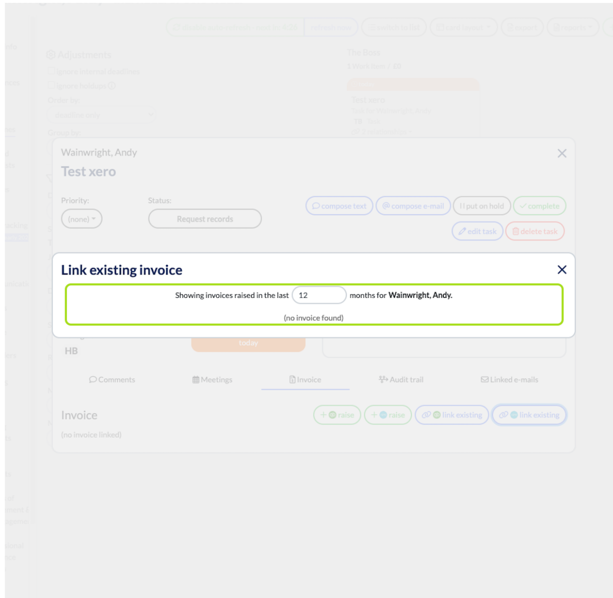
STEP 23

to link an invoice already in xero Click on link existing



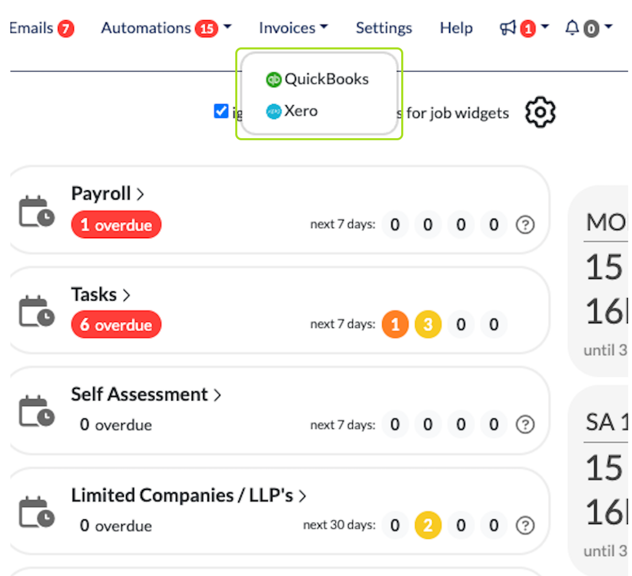
STEP 24

a list showing the last 12 months of invoices you have raised for this client will show and you can select the invoice you want



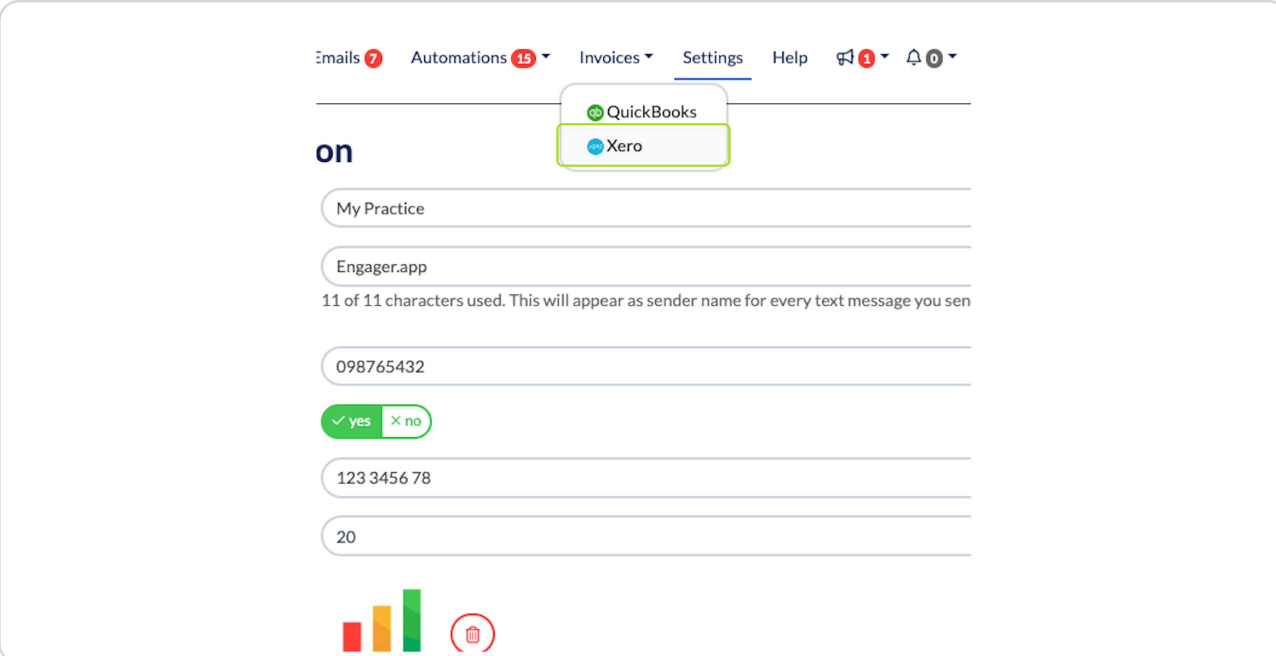
STEP 25

From any screen you can select the invoice menu at the top menu by Clicking on Deadlines



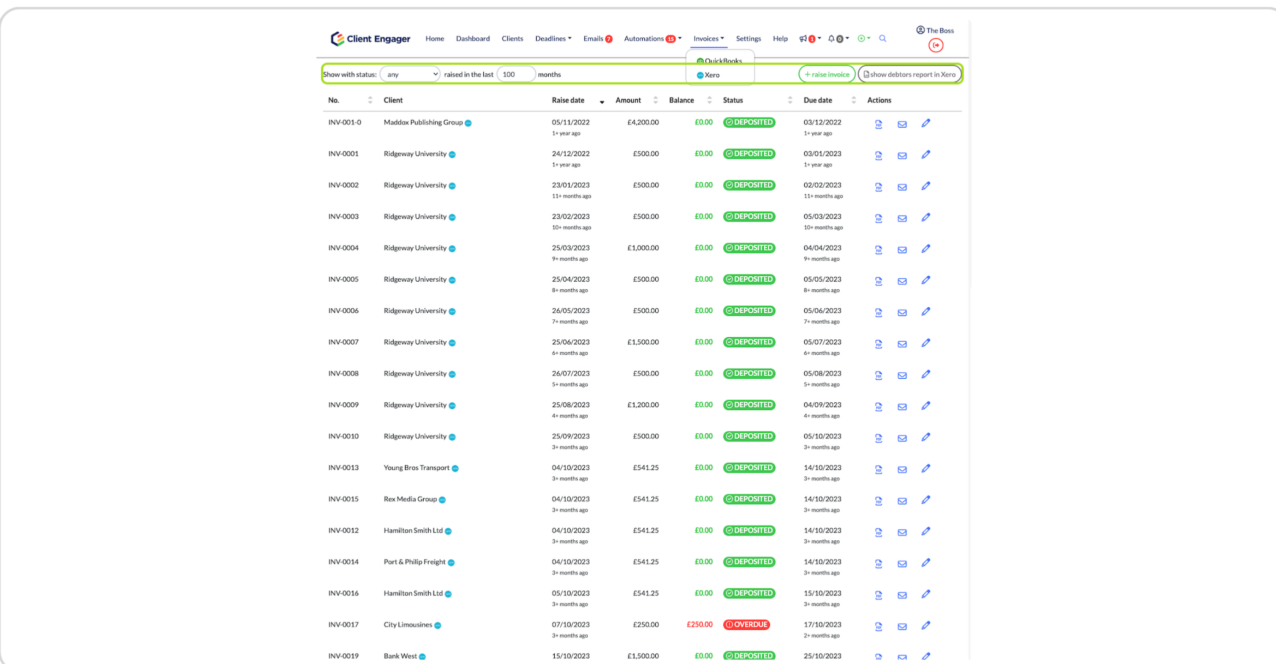
STEP 26

Click on Xero



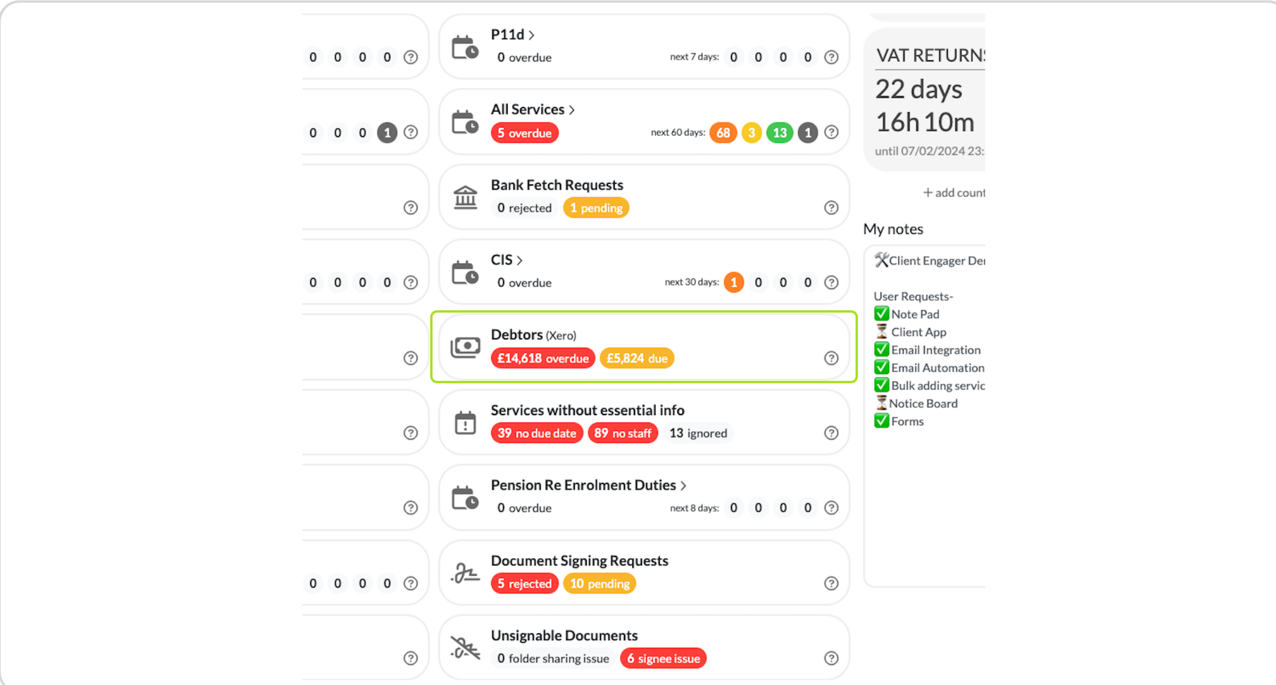
STEP 27

This view will then appear



STEP 28

We also have a widget summarising the debtors report in Xero



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