

# Using Xero in Client Engager

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

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Created by

Johann Goree

Creation Date

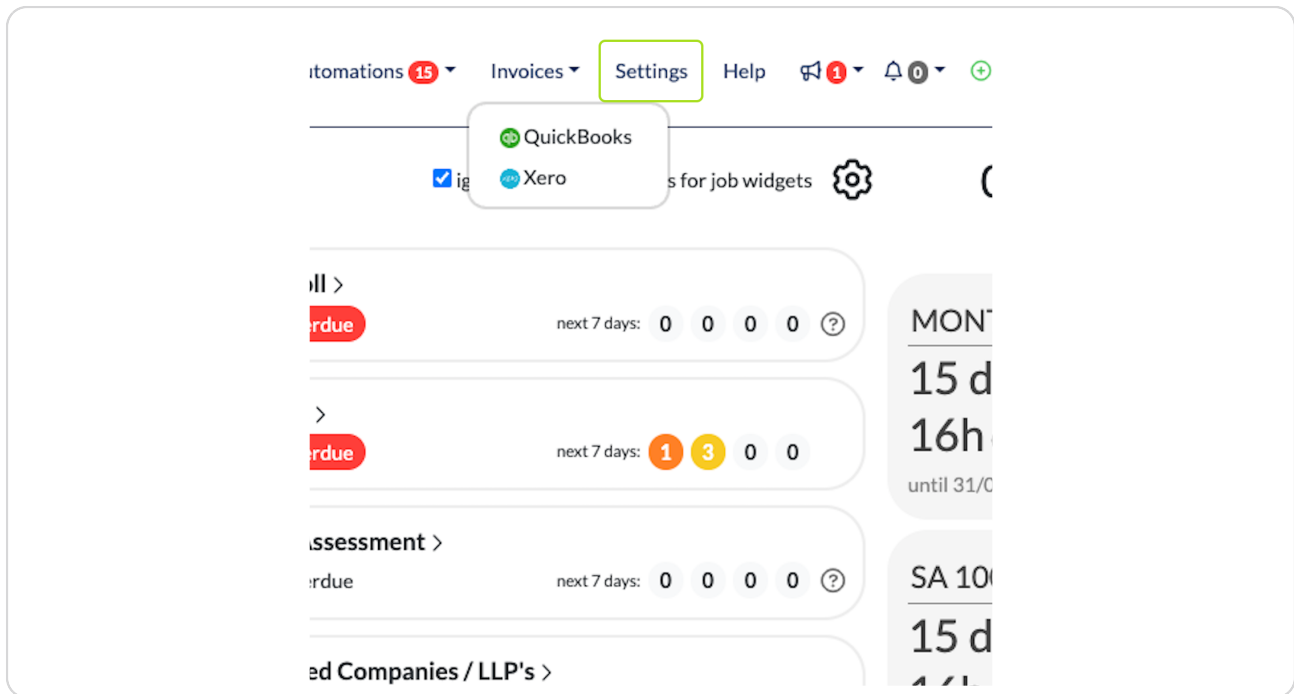
January 16, 2024

Last Updated

January 16, 2024

## STEP 1

### To link xero to Client Engager – Click on Settings



## STEP 2

### Go on Integrations...

Portal

General settings

Folder templates

File name templates

**Integrations**

Armalytix

Crezco

Companies House

HMRC coming soon

Microsoft 365

Google

QuickBooks

Xama Technologies

Xero

**Application**

Subscription

Info

Telephone:

☐ show on homepage

☐ show in Client Portal

☒ show on Letters of Engagement signing page

Calendar link to book meetings with your firm:  
(eg. via Calendly or Microsoft Bookings)

https://calendly.com/some-link

☒ show in Client Portal

Core Values:

Name

Efficiency

Teamwork

Collaborate

Adaptable

Improving

+ add core value

The position of Primary Officer:

Country of origin:

Currency:

Professional Body:

## STEP 3

### Click on Xero

Companies House

HMRC coming soon

Microsoft 365

Google

QuickBooks

Xama Technologies

**Xero**

**Application**

Subscription

Info

Core Values:

Name

Efficiency

Teamwork

Collaborate

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+ add core value

The position of Primary Officer:

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Professional Body:

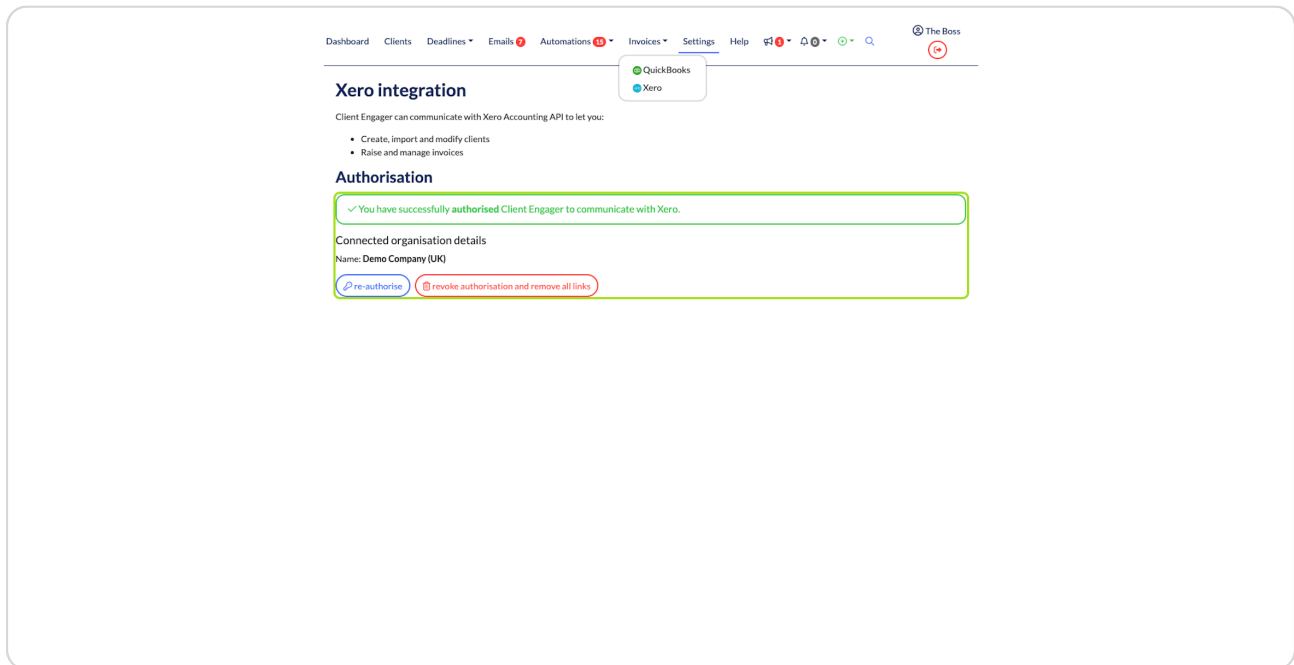
Get access to offers from Client Engager and its partners:

yes

no

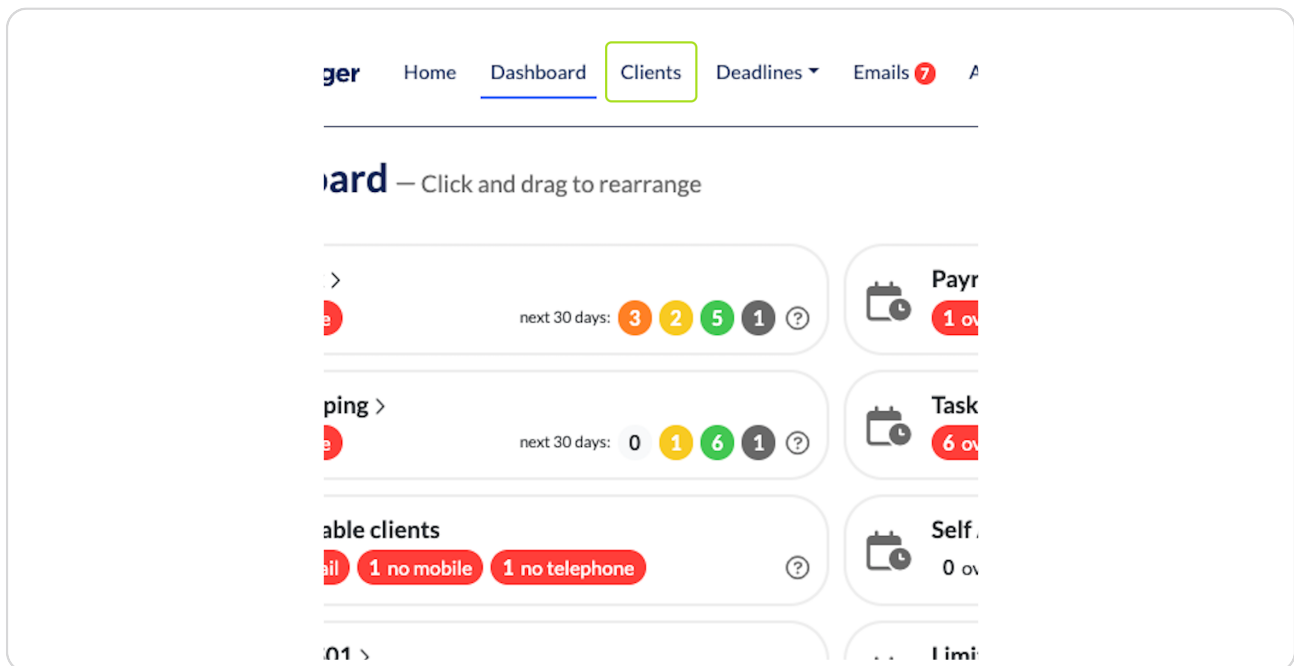
## STEP 4

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


[prospects](#) [active clients](#) [archived clients](#) [+ new c](#)

Filtered clients - 6 current / 98 total

<input type="checkbox"/>	Name	Type	Engage date	Xama risk level	
<input type="checkbox"/>	Andy Wainwright	Individual or Sole Trader	—	(not linked)	n
<input type="checkbox"/>	Client Engager Online Limited	Limited Company	09/06/2022	(in progress)	M

## STEP 7

Click on Step 1:

 [Home](#) [Dashboard](#) [Clients](#) [Deadli](#)

[←](#) **Wainwright, Andy** - Individual or Sole Ti

Info

☒ Client info

☐ Tax References

Work

☐ Deadlines

☐ Tailored checklists

☐ Time tracking

Step 1:

Step 2:

General info

Related individuals & contact

**General info**

ID: 154

Type: Individual or Sole Trader

Status: active

Client name: Wainwright, Andy

First name: Andy

Surname: Wainwright

Preferred name:

## STEP 8

### Click on Link with Xero

Related businesses

Services & pricing

Service details

External systems

Ter

General info

Individual or Sole Trader

Contact Only

'Contact Only' client type does not use slots in your subscription but cannot have any services.

active

archived

Link with QuickBooks

not linked

Link with Xero

not linked

Link with Xama client

not linked

+1 other link as contact

First name will be used

Use for no custom trading name

## 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.

Client type: 

Individual or Sole Trader

Contact Only

'Contact Only' client type does not use slots in your subscription but cannot have any services.

Status: 

prospect

active

archived

Link with QuickBooks

not linked

Link with Xero

not linked

Link with Xama client

not linked

+1 other link as contact

1 Xero

Link existing Xero client

Create new Xero client

Unlink Xero client

t, Andy

(no results)

① Leave empty for no custom trading name

Email:

Address: Client agrees to receive emails for: ☒ essential contact ☐ marketing

Mobile:

File phone: ① Include country code prefix for numbers outside the UK - eg. +353 for Ireland.

## STEP 10

Click on **confirm** to link or add the customer to Xero

Link with Xero client not linked +1 other link as contact

**Xero**

Link existing Xero client **Create new Xero client** Unlink Xero client

in Xero with the details copied from Client Engager

**confirm**

Leave empty for no custom trading name

email: contact@engager.app

Client agrees to receive emails for: ☒ essential contact ☐ marketing

phone: 07311287407

Include country code prefix for numbers outside the UK - eg. +353 for Ireland

Client agrees to receive text messages for: ☒ essential contact ☐ marketing

## STEP 11

Click on **Save**

Client agrees to receive emails for: ☒ essential contact ☐ marketing

07311287407

Include country code prefix for numbers outside the UK - eg. +353 for Ireland

Client agrees to receive text messages for: ☒ essential contact ☐ marketing

123 Some Street

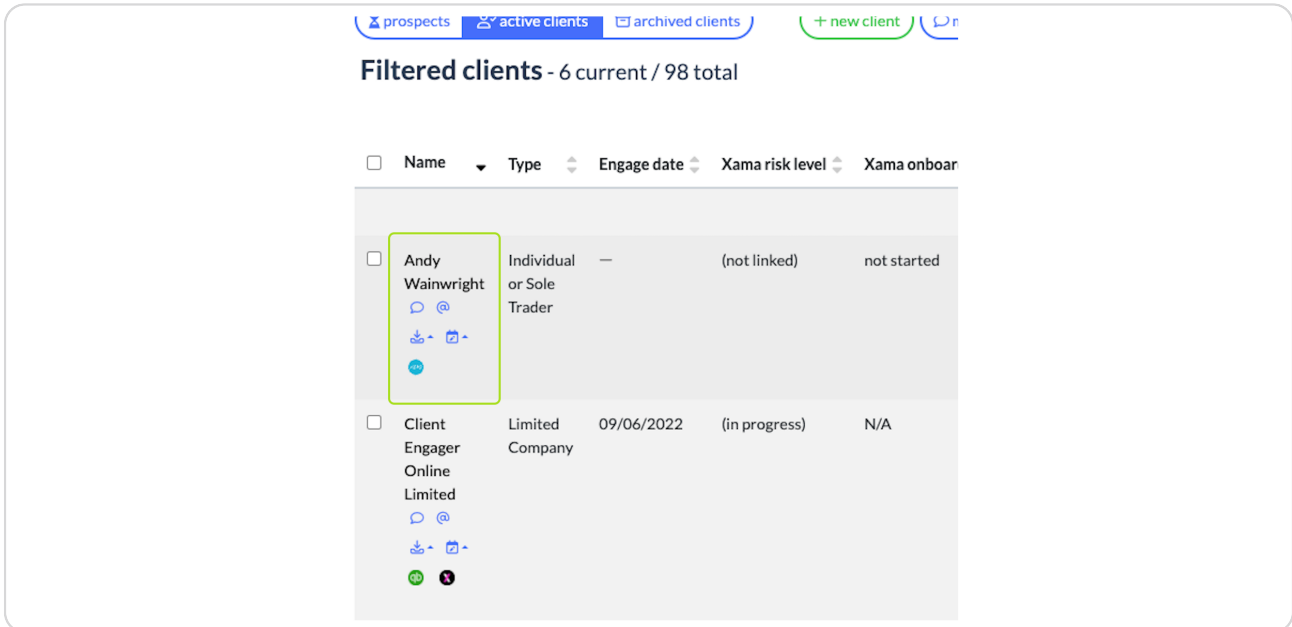
City / Town	County
CH3 2PW	United Kingdom

The Plaza

**Save** **Cancel**

## STEP 12

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



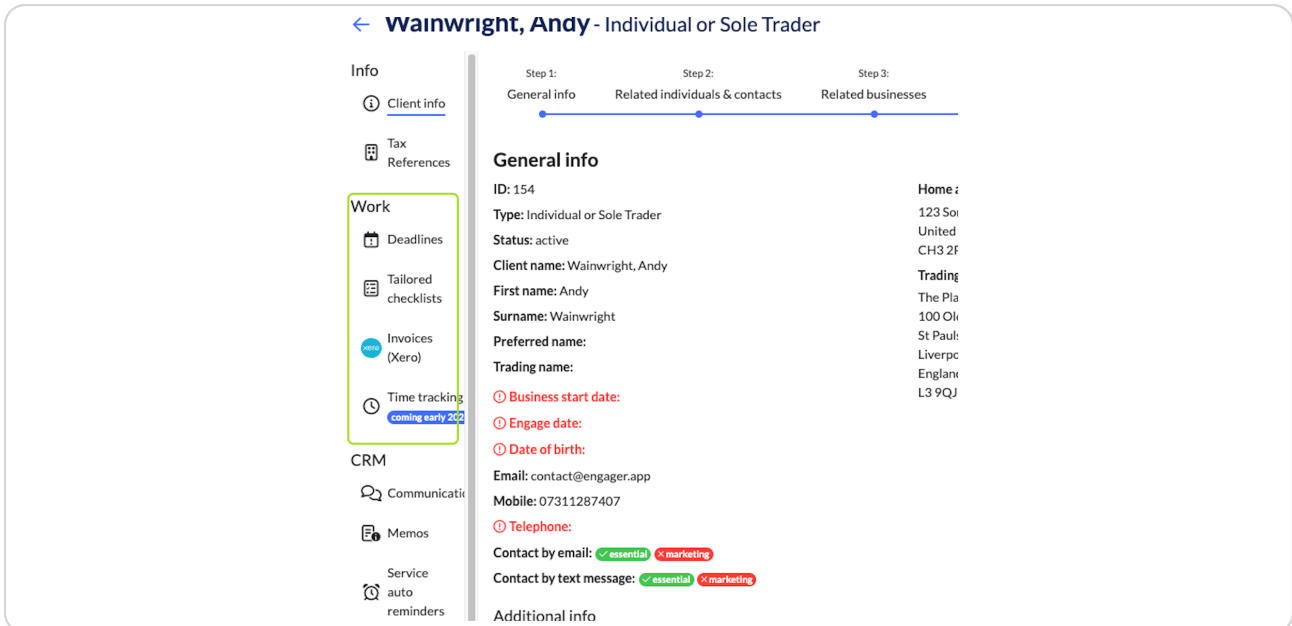
prospects active clients archived clients + new client

Filtered clients - 6 current / 98 total

<input type="checkbox"/>	Name	Type	Engage date	Xama risk level	Xama onboard
<input type="checkbox"/>	Andy Wainwright	Individual or Sole Trader	—	(not linked)	not started
<input type="checkbox"/>	Client Engager Online Limited	Limited Company	09/06/2022	(in progress)	N/A

## STEP 13

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



← Wainwright, Andy - Individual or Sole Trader

Info

- Client info
- Tax References
- Work
  - Deadlines
  - Tailored checklists
  - Invoices (Xero)
  - Time tracking coming early 2022
- CRM
  - Communications
  - Memos
  - Service auto reminders

Step 1: General info Step 2: Related individuals & contacts Step 3: Related businesses

**General info**

ID: 154 Home : 123 Soi United CH3 2F

Type: Individual or Sole Trader

Status: active

Client name: Wainwright, Andy

First name: Andy

Surname: Wainwright

Preferred name:

Trading name:

① Business start date:

① Engage date:

① Date of birth:

Email: contact@engager.app

Mobile: 07311287407

① Telephone:

Contact by email: essential marketing

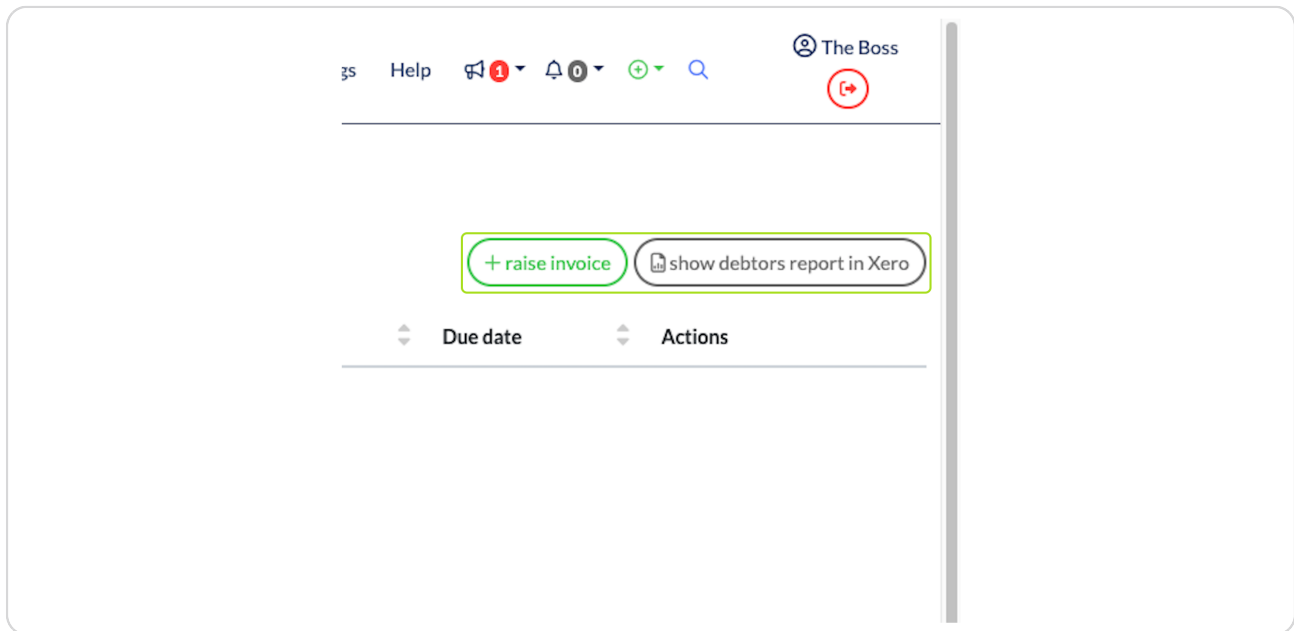
Contact by text message: essential marketing

Additional info



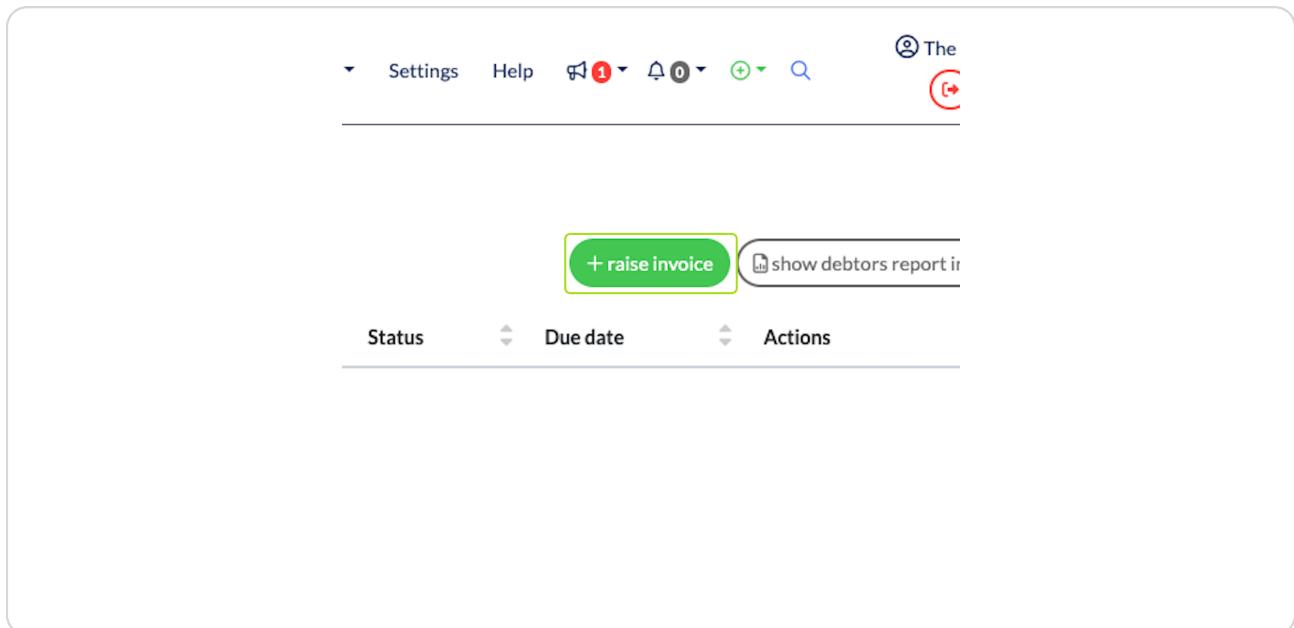
## STEP 14

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

The screenshot shows the 'Raise invoice' dialog box in Xero. The client is 'Wainwright, Andy'. The status is 'Approved & ready for client'. The raise date is '16/01/2024' and the due date is '16/01/2024'. The dialog box has a table for 'Lines' with columns: Item, Description, Qty, Price, Account, Tax rate, VAT, and Amount. There is one line with 'Qty' 1 and 'Price' 0. The total is £0.00. The dialog box also has a 'Save' button and a 'Cancel' button.

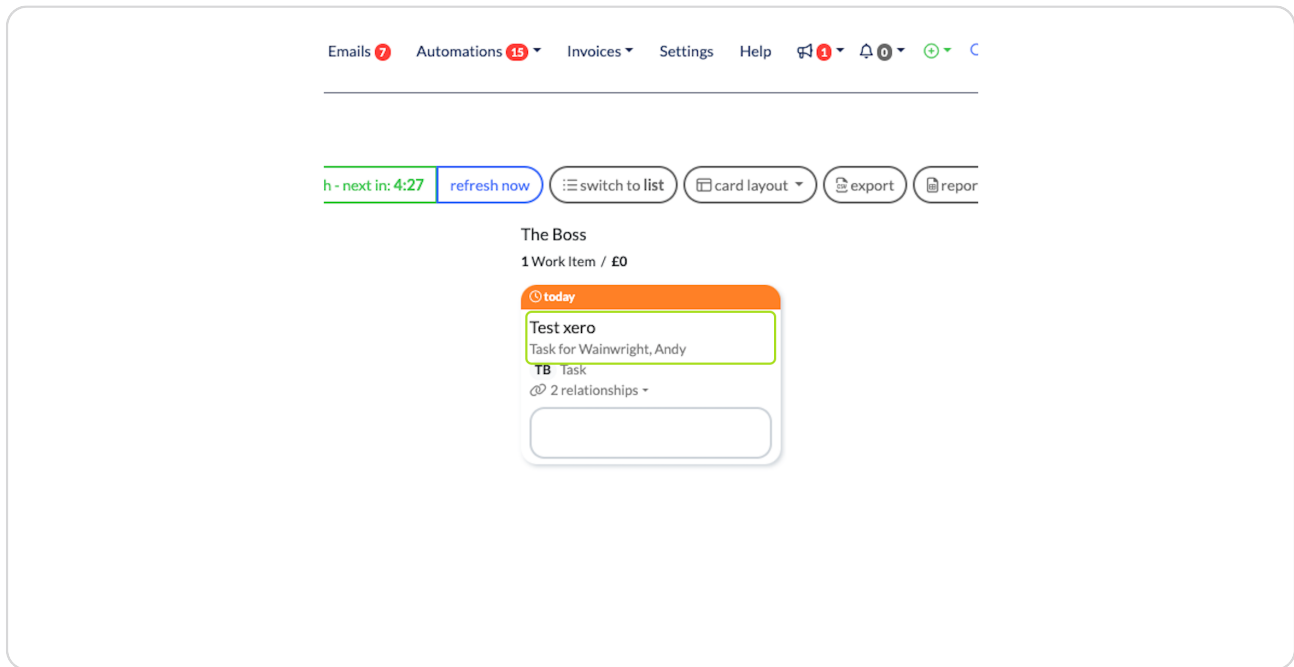
## STEP 17

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

The screenshot shows the Xero interface for client 'Wainwright, Andy - Individual or Sole Trader'. The 'Work' section is active, and the 'Deadlines' option is highlighted with a green box. The 'Deadlines' option is located under the 'Work' section, below 'Tailored checklists' and above 'Invoices (Xero)'. The 'Invoices (Xero)' option is also highlighted with a blue box. The 'Time tracking' option is marked as 'coming early 2024'. The 'CRM' section is visible at the bottom.

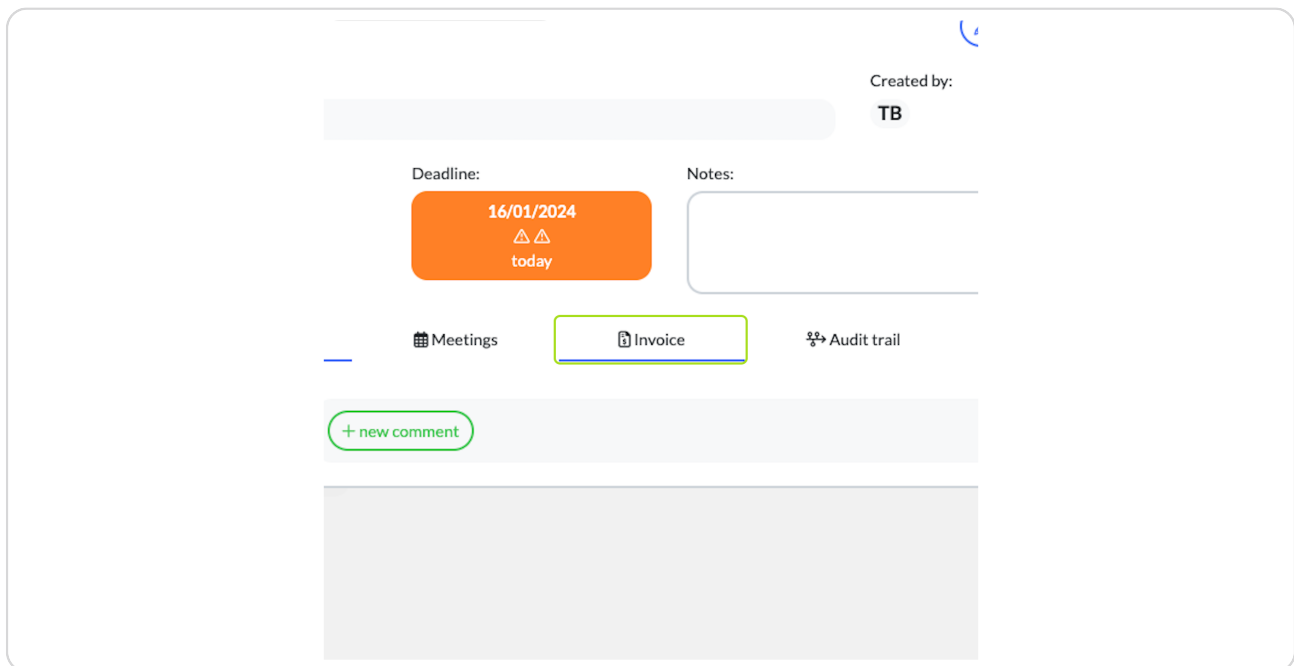
## STEP 18

Click on the task you wish to invoice for



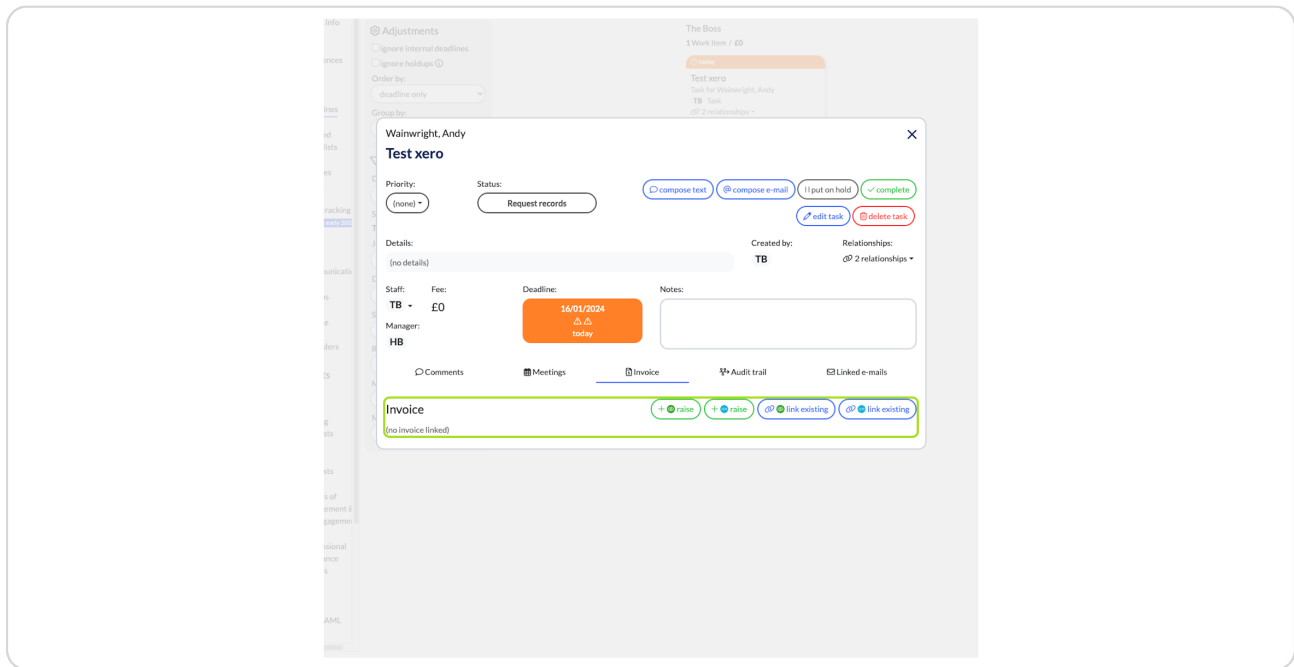
## STEP 19

Click on Invoice tab



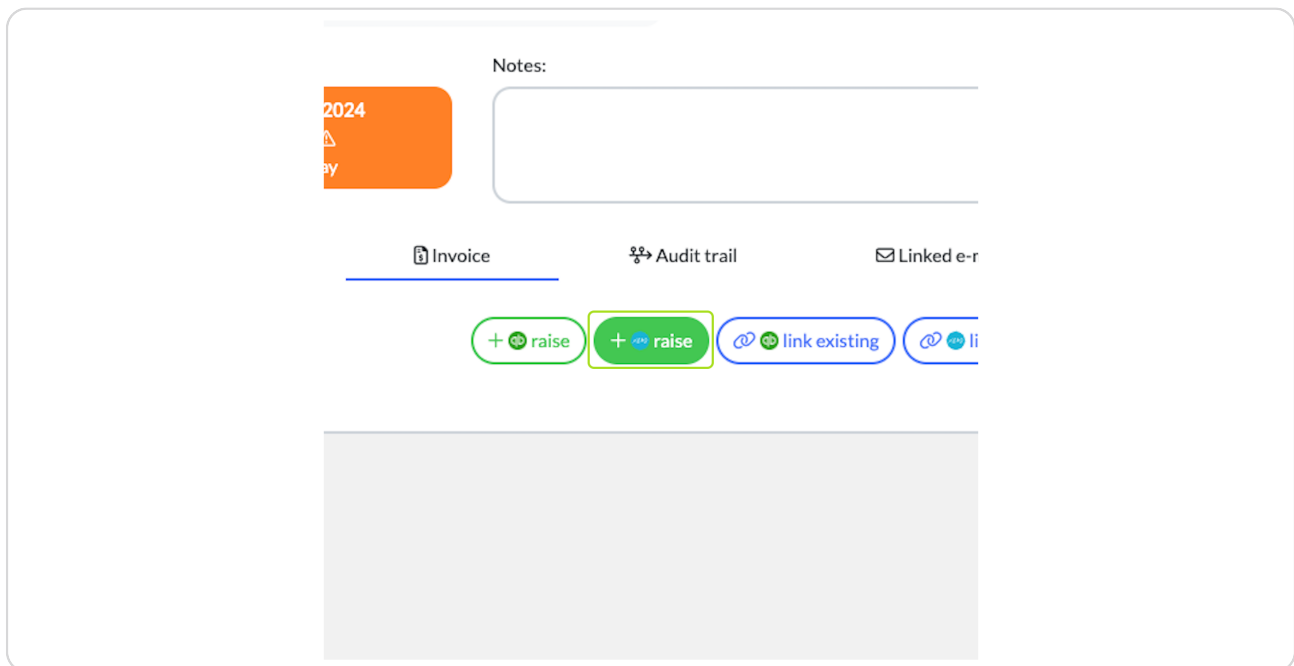
## STEP 20

Click on the option you require, link or add invoice



## STEP 21

to create an invoice Click on raise



**enter the details and Click on submit**

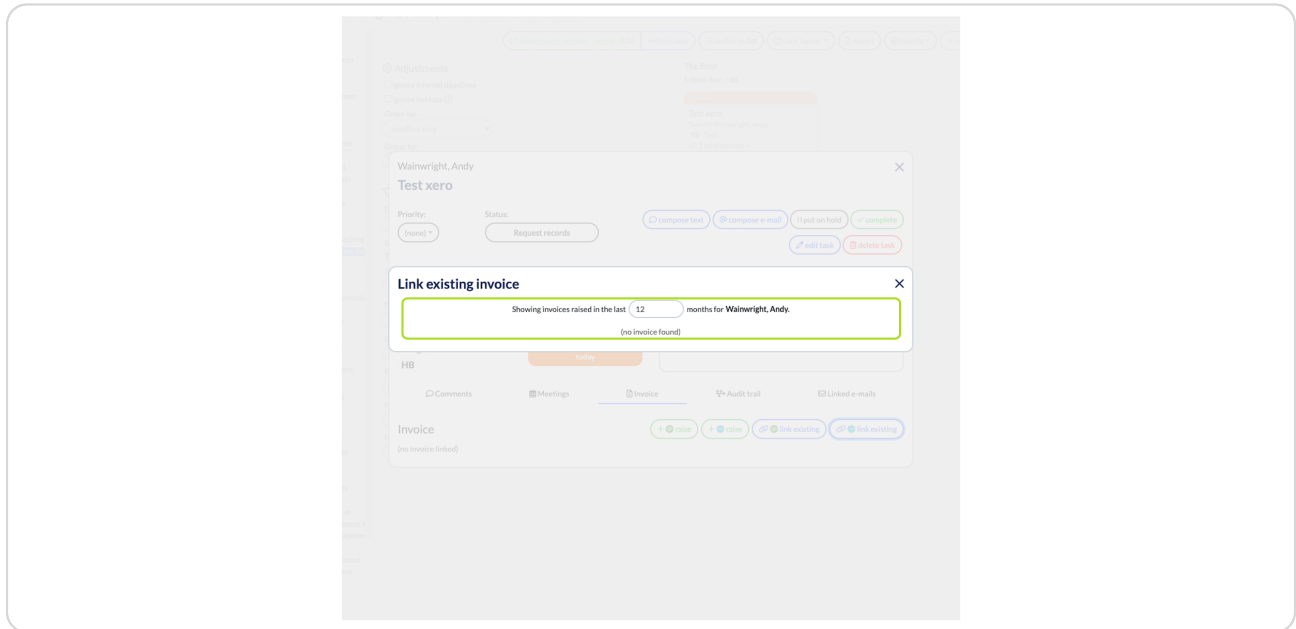
## STEP 23

**to link an invoice already in xero Click on link existing**

Created with *Tango*

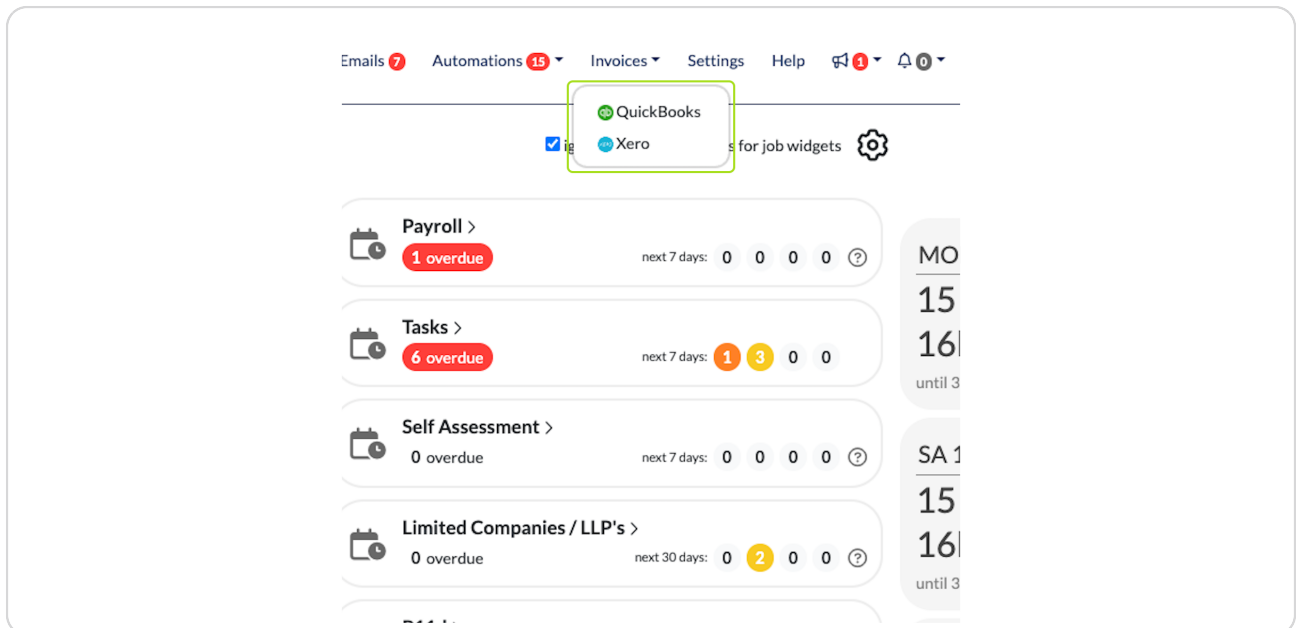
## STEP 24

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



## Click on Xero

## STEP 27

## This view will then appear

Created with *Tango*

STEP 28

We also have a widget summarising the debtors report in Xero

0000?

P11d >

0 overdue

next 7 days: 0000?

0001?

All Services >

5 overdue

next 60 days: 683131?

?

Bank Fetch Requests

0 rejected1 pending

?

0000?

CIS >

0 overdue

next 30 days: 1000?

?

Debtors (Xero)

£14,618 overdue£5,824 due

?

?

Services without essential info

39 no due date89 no staff13 ignored

?

?

Pension Re Enrolment Duties >

0 overdue

next 8 days: 0000?

0000?

Document Signing Requests

5 rejected10 pending

?

?

Unsignable Documents

0 folder sharing issue6 signee issue

?

VAT RETURN

22 days16h 10m

until 07/02/2024 23:

+ add count

My notes

Client Engager De

User Requests-

✓

Note Pad

✓

Client App

✓

Email Integration

✓

Email Automation

✓

Bulk adding service

✓

Notice Board

✓

Forms



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