

Using Xero in Client Engager

28 Steps

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Created by

Johann Goree

Creation Date

January 16, 2024

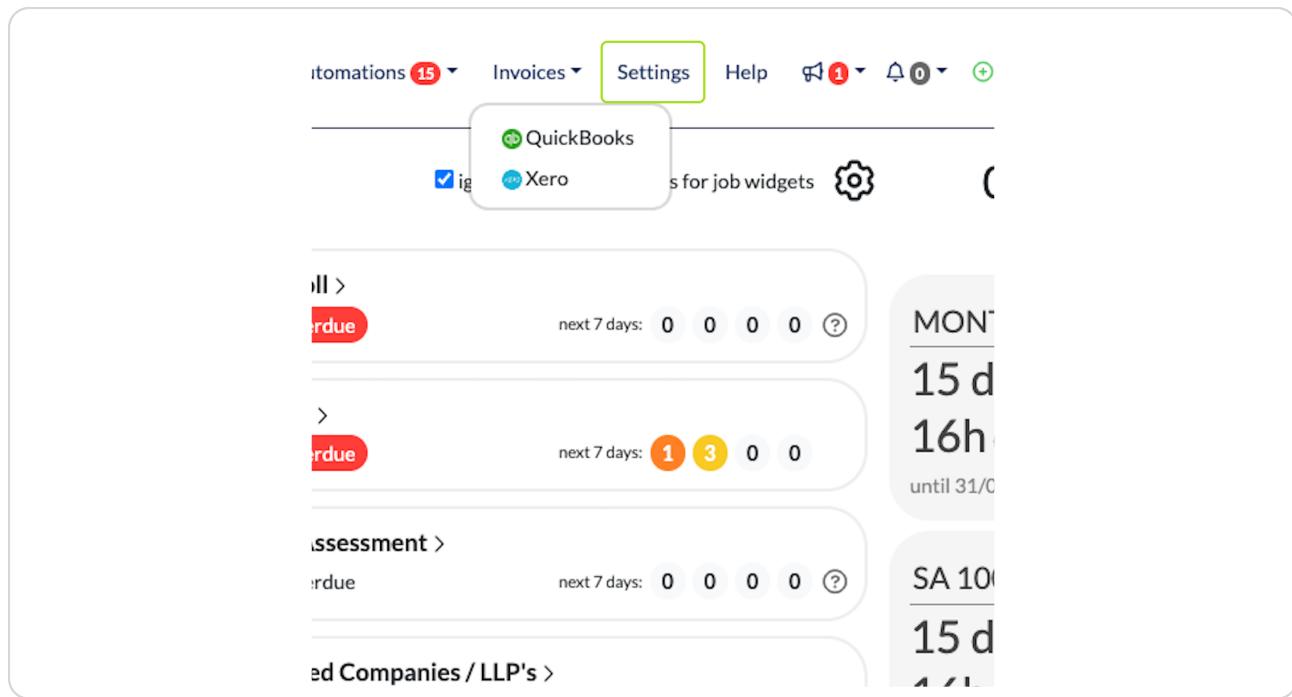
Last Updated

January 16, 2024



STEP 1

To link xero to Client Engager – Click on Settings



STEP 2

Go on Integrations...

General settings

Folder templates

File name templates

Integrations

- Armalytix
- Crezzo
- Companies House
- HMRC coming soon
- Microsoft 365
- Google
- QuickBooks
- Xama Technologies
- Xero**

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

Telephone:

show on homepage

show in Client Portal

show on Letters of Engagement signing page

<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

Core Values:

Name:

Efficiency

Teamwork

Collaborate

Adaptable

Improving

[+ add core value](#)

The position of Primary Officer:

Country of origin:

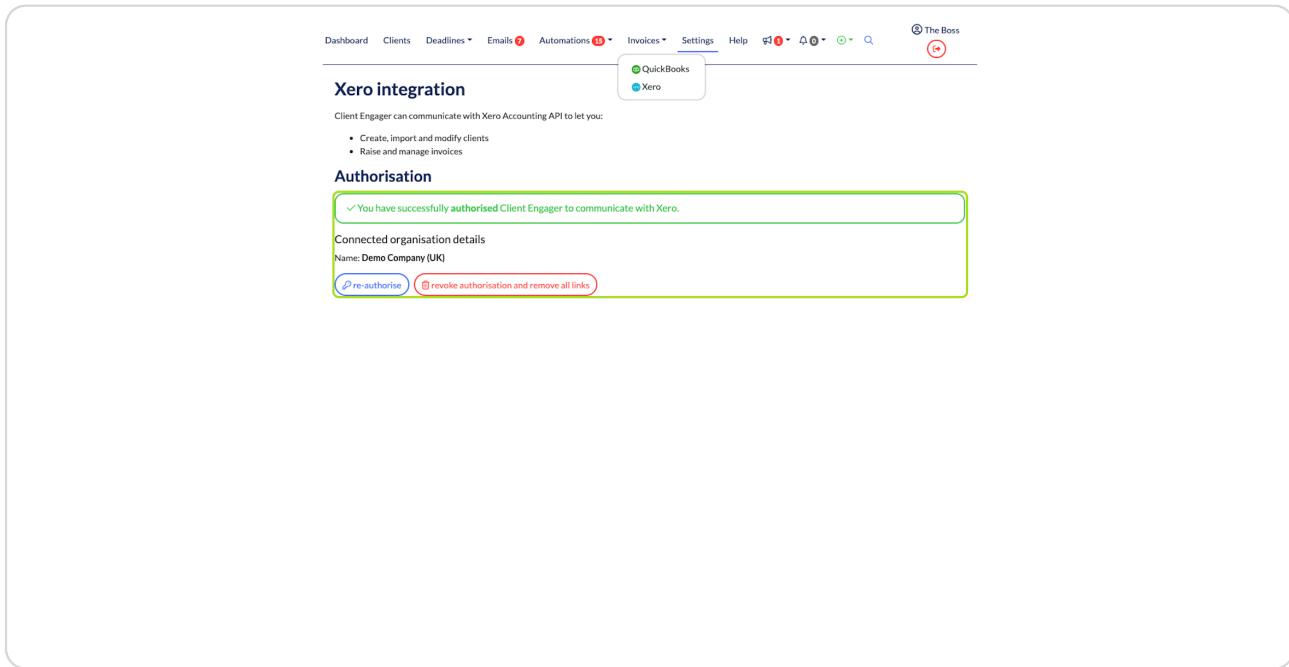
Currency:

Professional Body:

Get access to offers from Client Engager and its partners: yes no

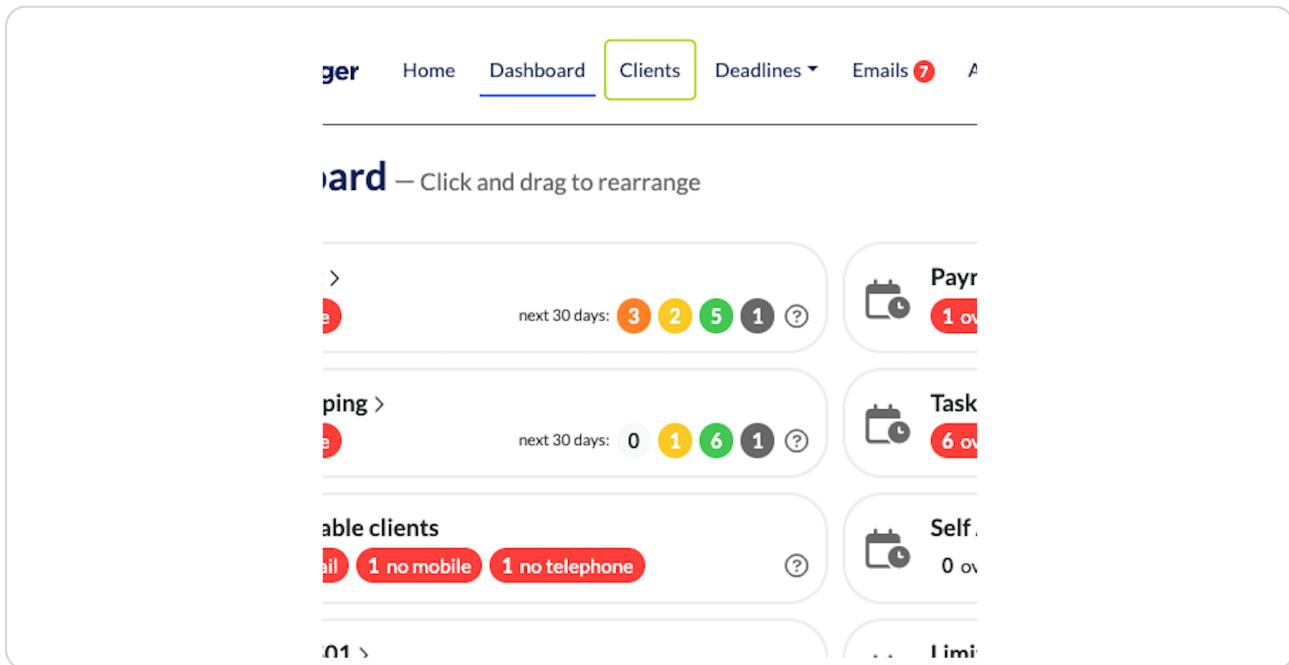
STEP 4

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



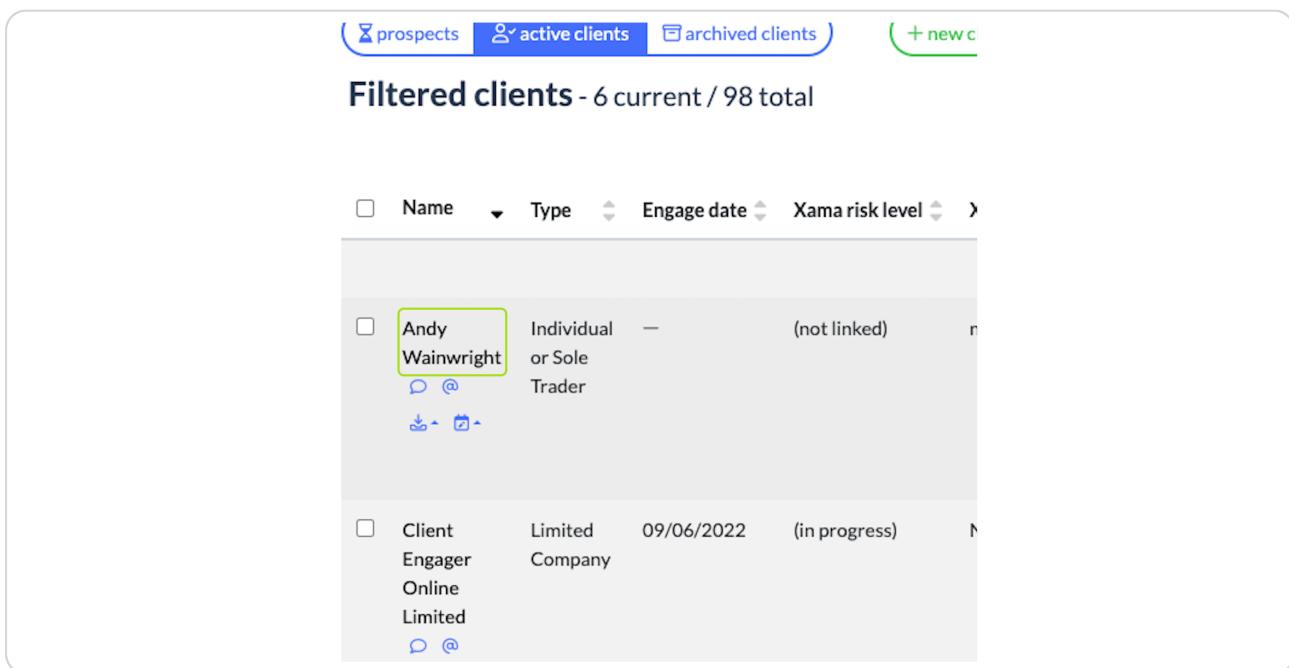
STEP 5

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



STEP 6

Click on the client

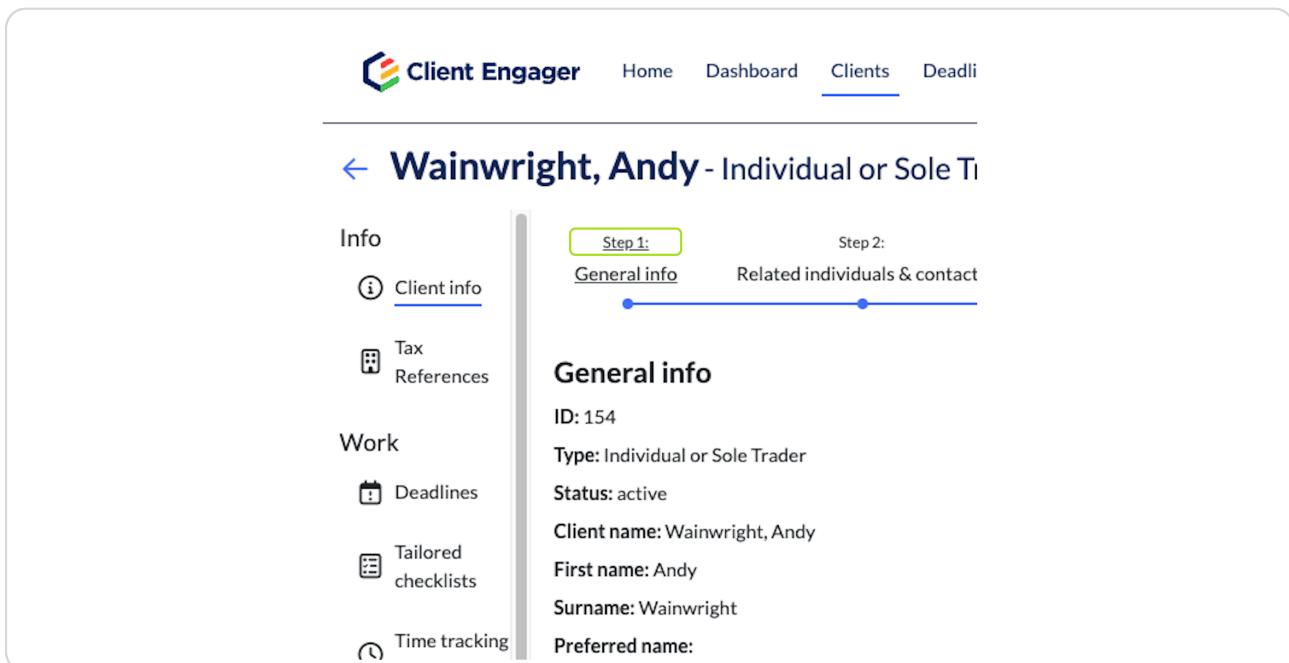


Filtered clients - 6 current / 98 total

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

STEP 7

Click on Step 1:



Client Engager

Home Dashboard Clients Deadli

← Wainwright, Andy - Individual or Sole Tr

Info

Client info

Tax References

Work

Deadlines

Tailored checklists

Time tracking

Step 1: General info

Step 2: Related individuals & contact

General info

ID: 154

Type: Individual or Sole Trader

Status: active

Client name: Wainwright, Andy

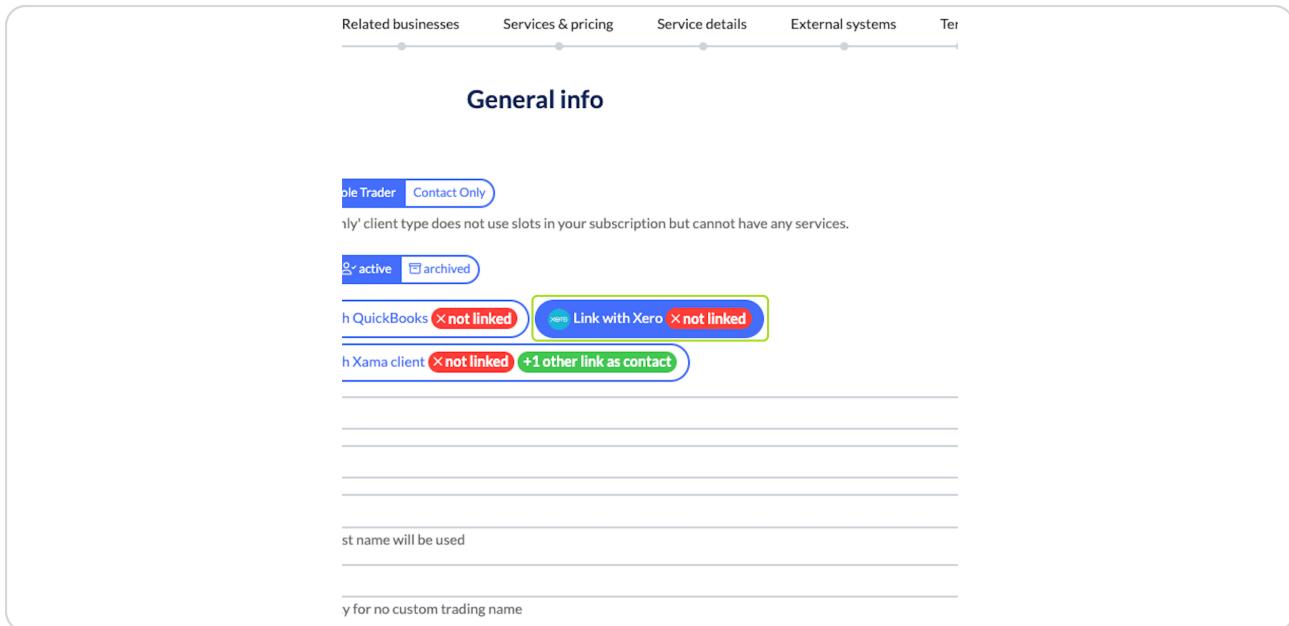
First name: Andy

Surname: Wainwright

Preferred name:

STEP 8

Click on Link with Xero

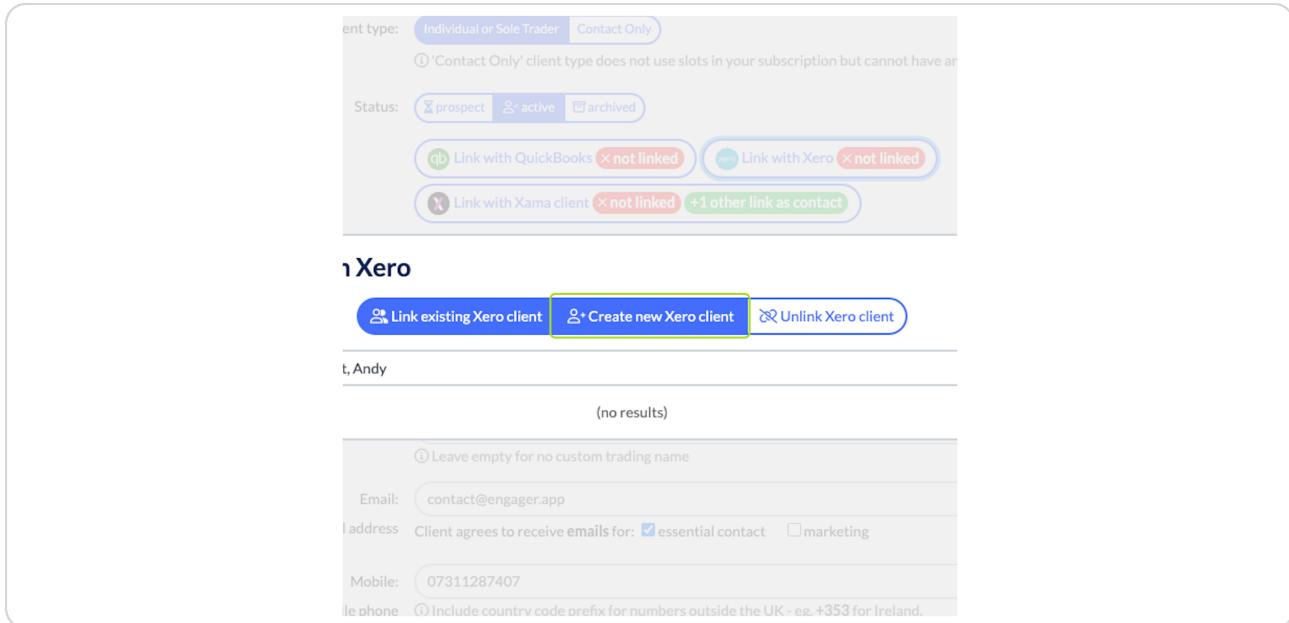


The screenshot shows the 'General info' section of a client record. At the top, there are tabs for 'Related businesses', 'Services & pricing', 'Service details', 'External systems', and 'Ter'. Below these tabs, there is a 'Client type' section with 'Individual or Sole Trader' and 'Contact Only' buttons. A note below states: '(i) 'Contact Only' client type does not use slots in your subscription but cannot have any services.' Under 'Status', there are buttons for 'prospect', 'active' (which is selected), and 'archived'. Below this, there are three buttons for linking to other systems: 'Link with QuickBooks' (not linked), 'Link with Xero' (not linked, highlighted with a green border), and 'Link with Xama client' (not linked). A note below these buttons says: '(i) Leave empty for no custom trading name'. There are also sections for 'Trading name' and 'Custom trading name'.

STEP 9

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

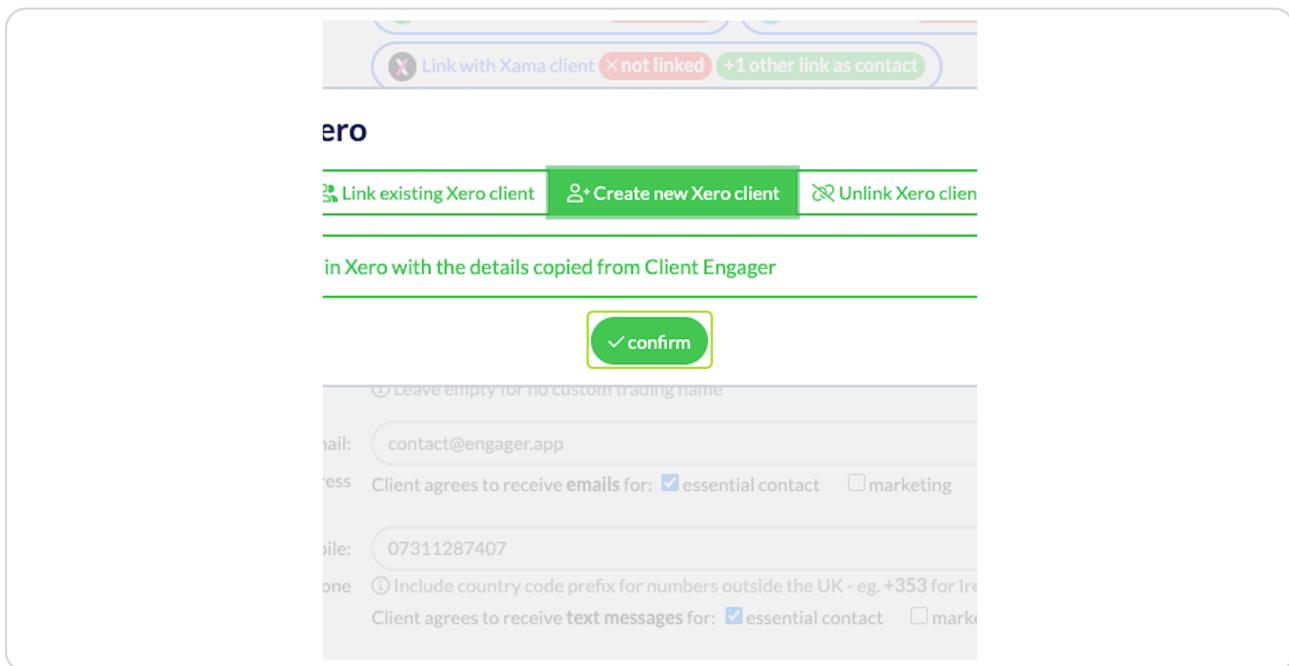
If linking you will search the Xero customer list for a match, if adding a new record Client Engager will create a new customer record in Xero and link to it.



The screenshot shows the 'Link Xero' section. At the top, there is a note: '(i) Leave empty for no custom trading name'. Below this, there are fields for 'Email' (contact@engager.app), 'Address' (Client agrees to receive emails for: essential contact marketing), and 'Mobile' (07311287407). A note below the mobile field says: '(i) Include country code prefix for numbers outside the UK - e.g. +353 for Ireland.' Below these fields, there are three buttons: 'Link existing Xero client', '+ Create new Xero client' (which is selected and highlighted with a green border), and 'Unlink Xero client'.

STEP 10

Click on confirm to link or add the customer to Xero



The screenshot shows a modal window for linking a client to Xero. At the top, there are three buttons: 'Link with Xama client' (disabled, greyed out), 'not linked' (highlighted in red), and '+1 other link as contact' (green). Below this, the word 'Xero' is displayed. There are three main buttons: 'Link existing Xero client' (disabled, greyed out), '+ Create new Xero client' (highlighted in green), and 'Unlink Xero client'. A green line indicates the 'Create new Xero client' path. Below these buttons, a green text box says 'in Xero with the details copied from Client Engager'. At the bottom is a green button with a checkmark and the word 'confirm'.

Link with Xama client +1 other link as contact

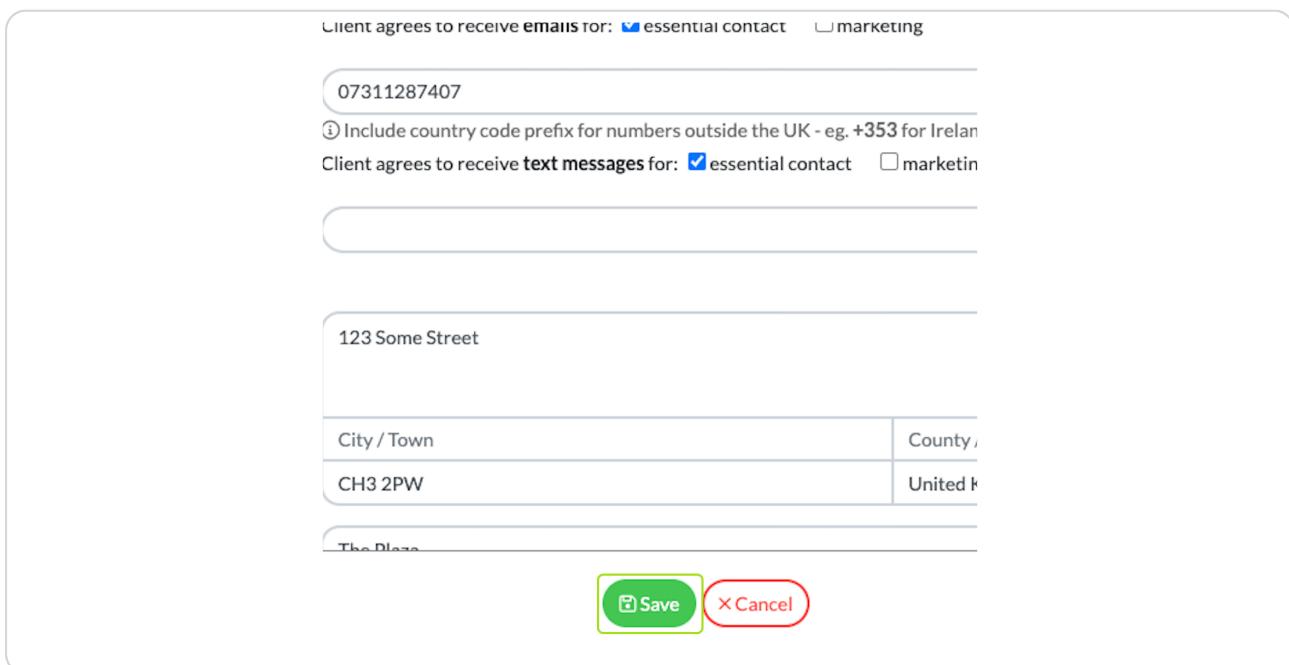
Xero

+ Create new Xero client

in Xero with the details copied from Client Engager

STEP 11

Click on Save



The screenshot shows a client details form. At the top, there is a section for email preferences: 'Client agrees to receive emails for: essential contact marketing'. Below this is a phone number field with the value '07311287407'. A note below the phone number says 'Include country code prefix for numbers outside the UK - eg. +353 for Ireland'. There is also a section for text message preferences: 'Client agrees to receive text messages for: essential contact marketing'. The form continues with address fields: '123 Some Street', 'City / Town' (value 'CH3 2PW'), 'County / Postcode' (value 'United Kingdom'), and a street number field with the value 'The Plaza'. At the bottom are two buttons: a green 'Save' button and a red 'Cancel' button.

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

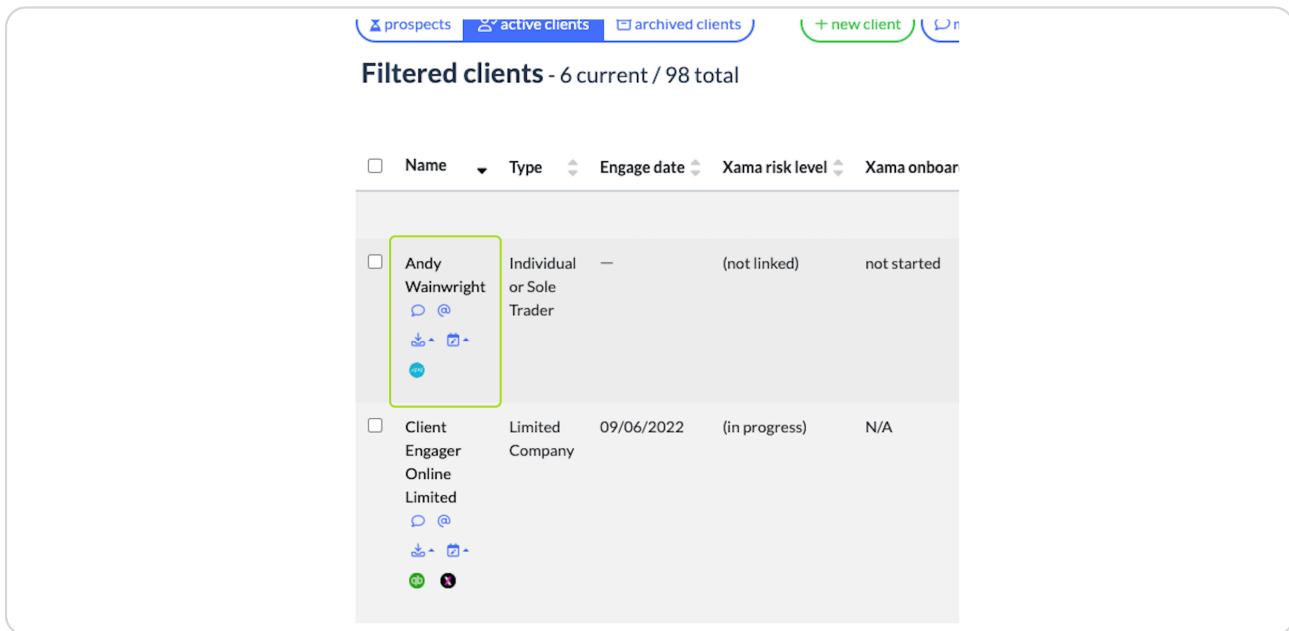
123 Some Street

City / Town	County / Postcode
CH3 2PW	United Kingdom

The Plaza

STEP 12

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

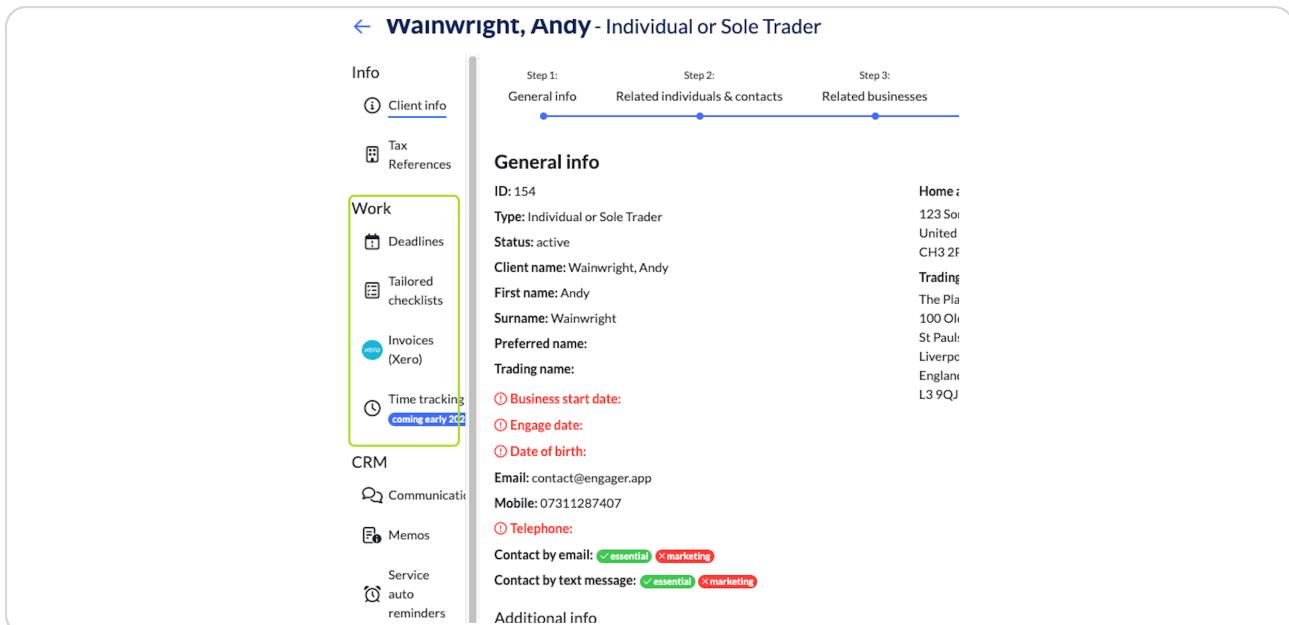


Filtered clients - 6 current / 98 total

	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	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 2023

CRM

Communications

Memos

Service auto reminders

Step 1: General info

Step 2: Related individuals & contacts

Step 3: Related businesses

General info

ID: 154

Type: Individual or Sole Trader

Status: active

Client name: Wainwright, Andy

First name: Andy

Surname: Wainwright

Preferred name:

Trading name:

Business start date:

Engage date:

Date of birth:

Email: contact@engager.app

Mobile: 07311287407

Telephone:

Contact by email: essential marketing

Contact by text message: essential marketing

Additional info

Home:

123 Somewhere

United Kingdom

CH3 2F

Trading:

The Place

100 Old Street

St Pauls

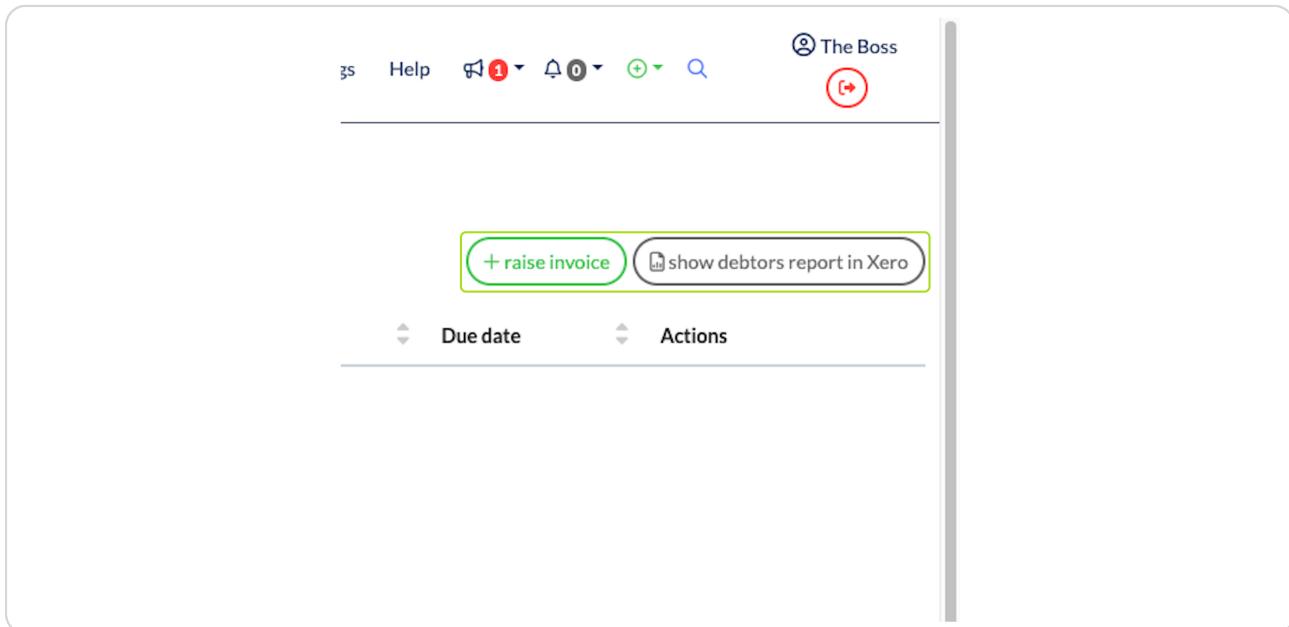
Liverpool

England

L3 9QJ

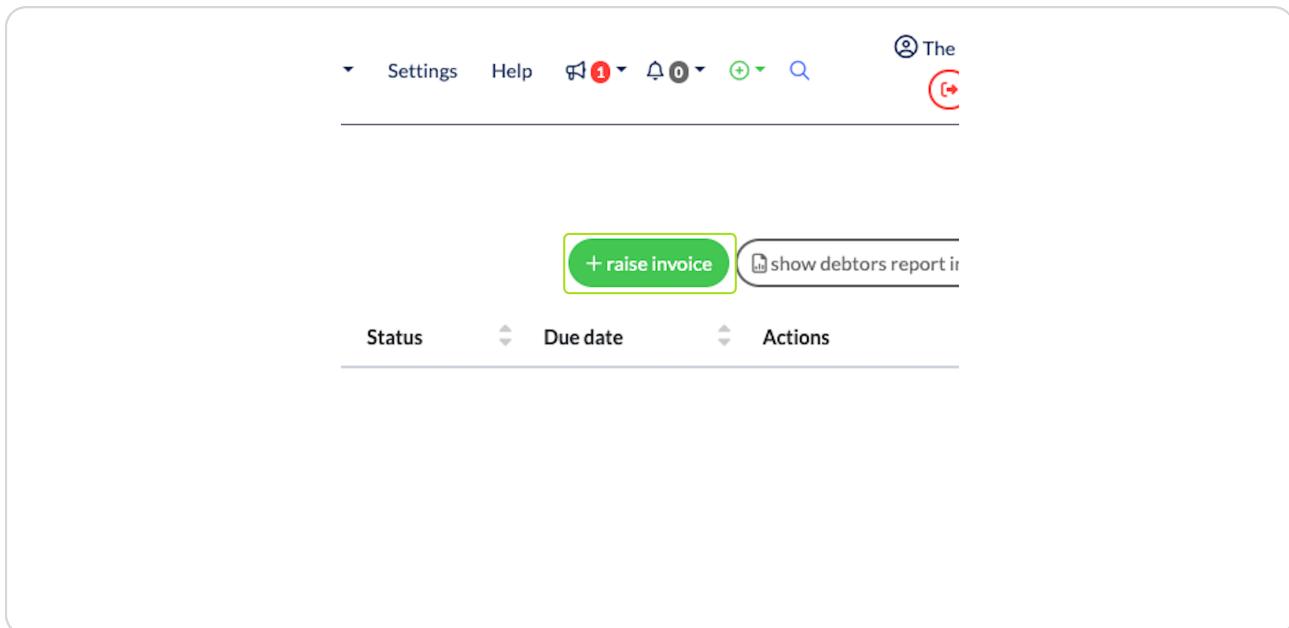
STEP 14

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



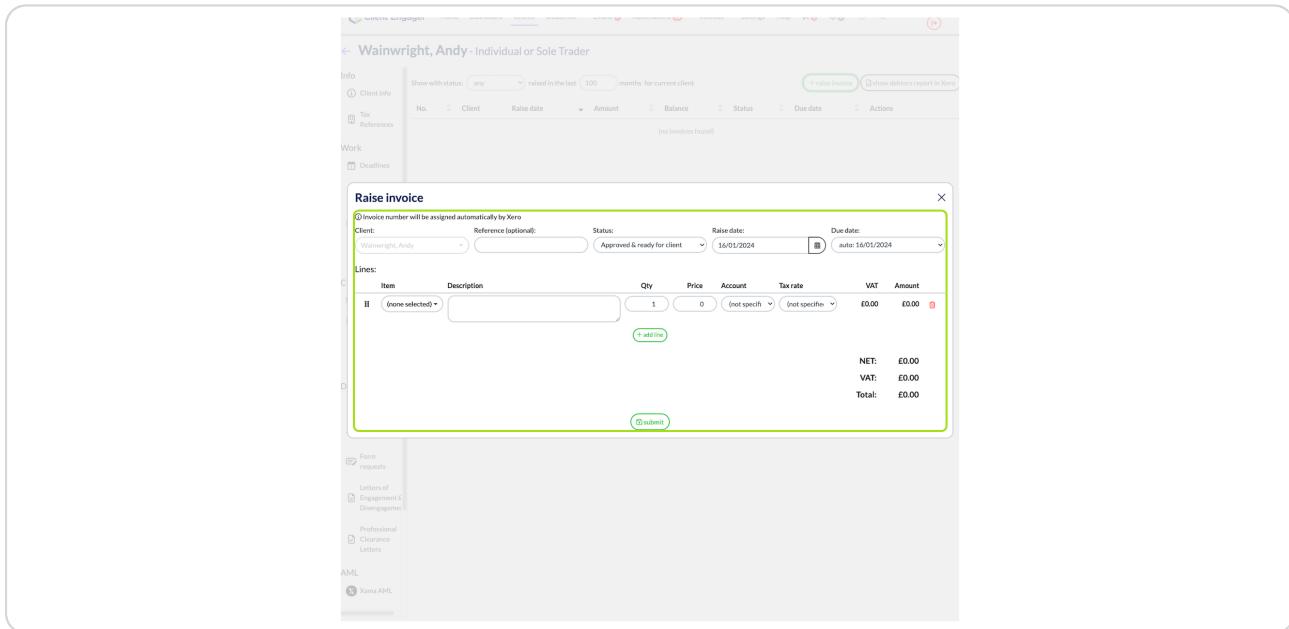
STEP 15

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



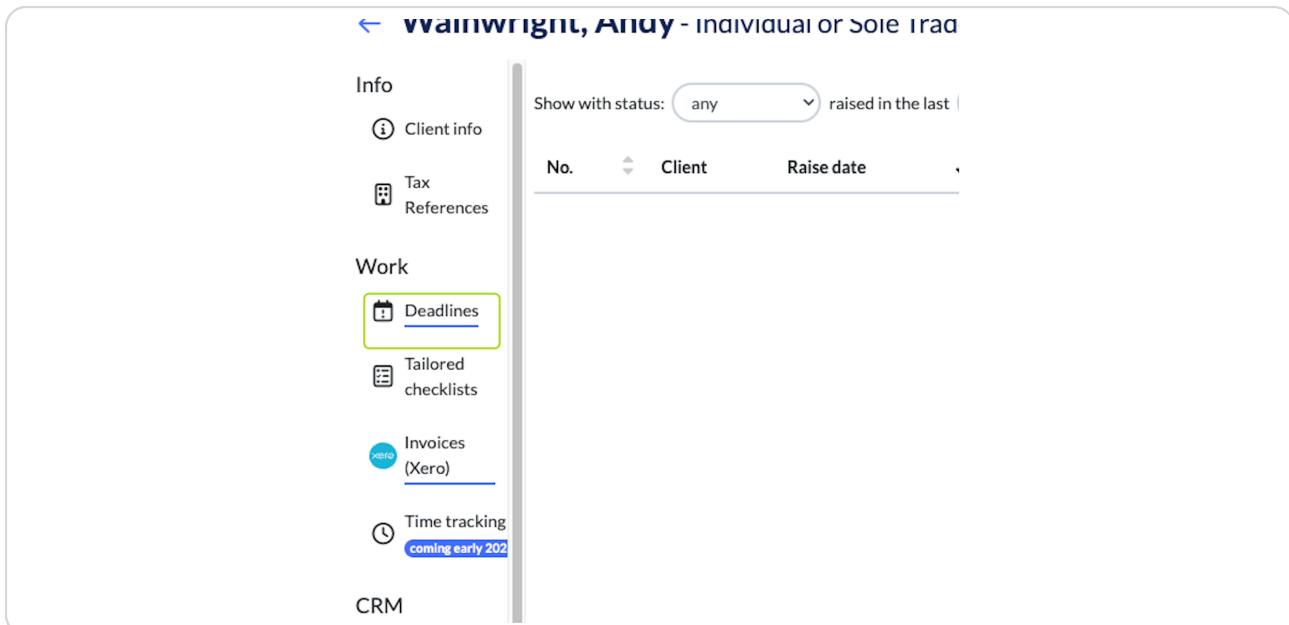
STEP 16

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



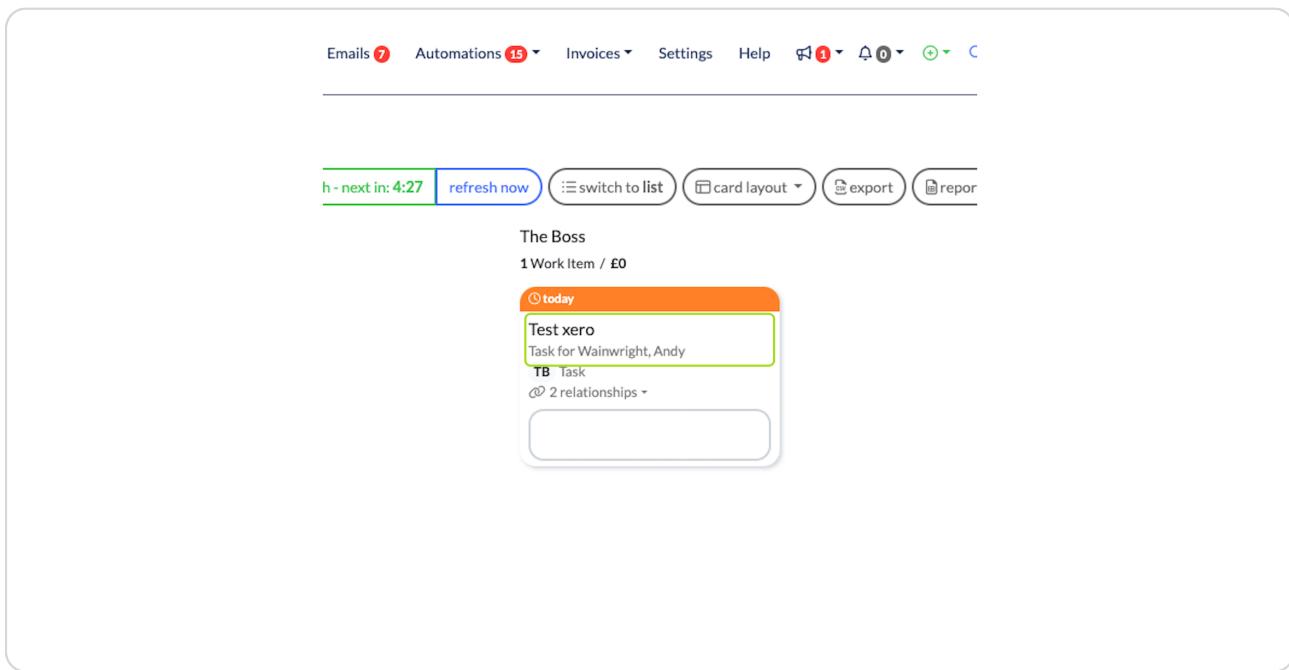
STEP 17

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



STEP 18

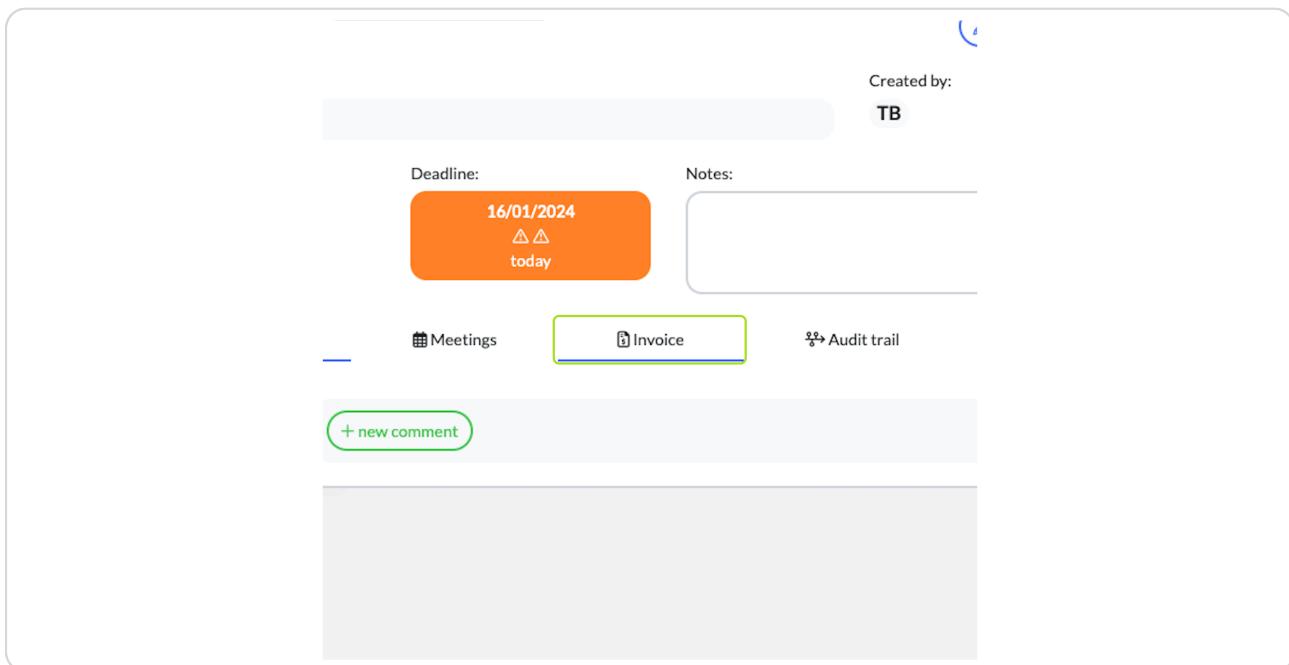
Click on the task you whish to invoice for



The screenshot shows a project management interface. At the top, there are navigation links: 'Emails 7', 'Automations 15', 'Invoices', 'Settings', 'Help', and a user icon. Below the navigation is a toolbar with buttons for 'refresh now', 'switch to list', 'card layout', 'export', and 'report'. The main area displays a card for a task named 'Test xero', which is assigned to 'Wainwright, Andy' and categorized as a 'Task'. The card has an orange header with the text '(today)'. Below the card, it says '1 Work Item / £0' and '2 relationships'. The card is highlighted with a green border.

STEP 19

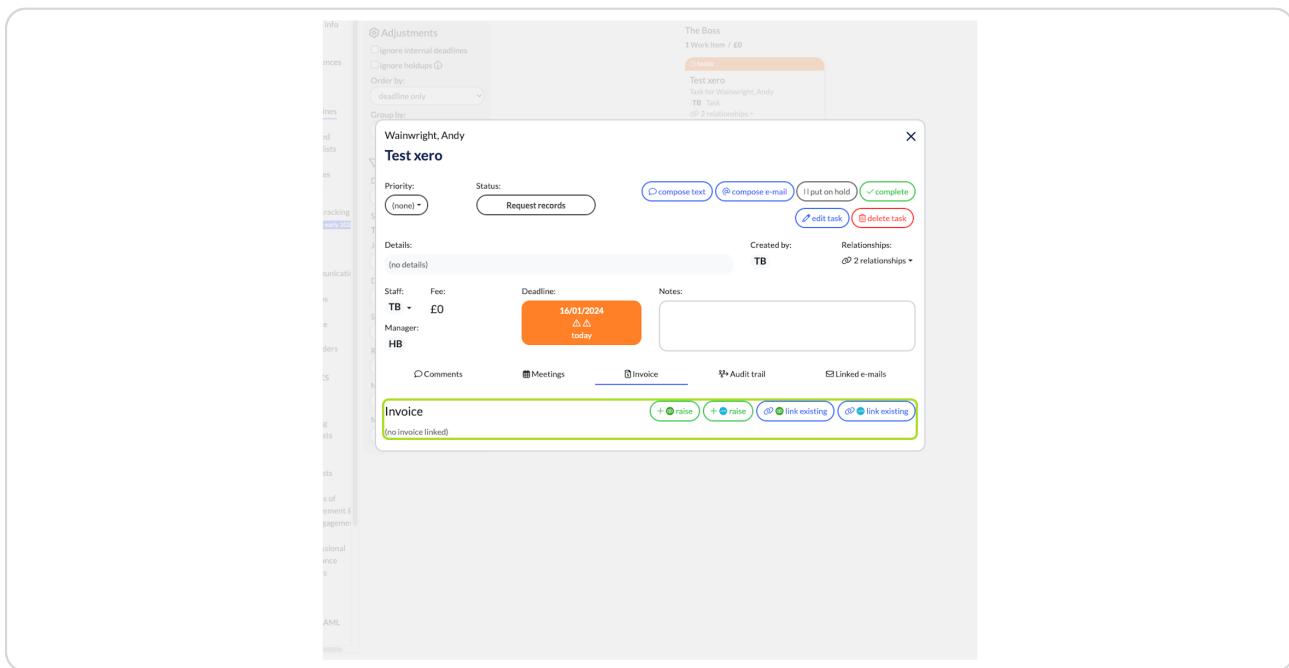
Click on Invoice tab



The screenshot shows a task card with various fields and tabs. At the top right, it says 'Created by: TB'. Below that, 'Deadline:' is listed as '16/01/2024' with a note 'today'. To the right, there is a 'Notes:' field with a large empty box. At the bottom of the card, there are three tabs: 'Meetings' (disabled), 'Invoice' (selected and highlighted with a green border), and 'Audit trail'. Below the card, there is a button for '+ new comment'.

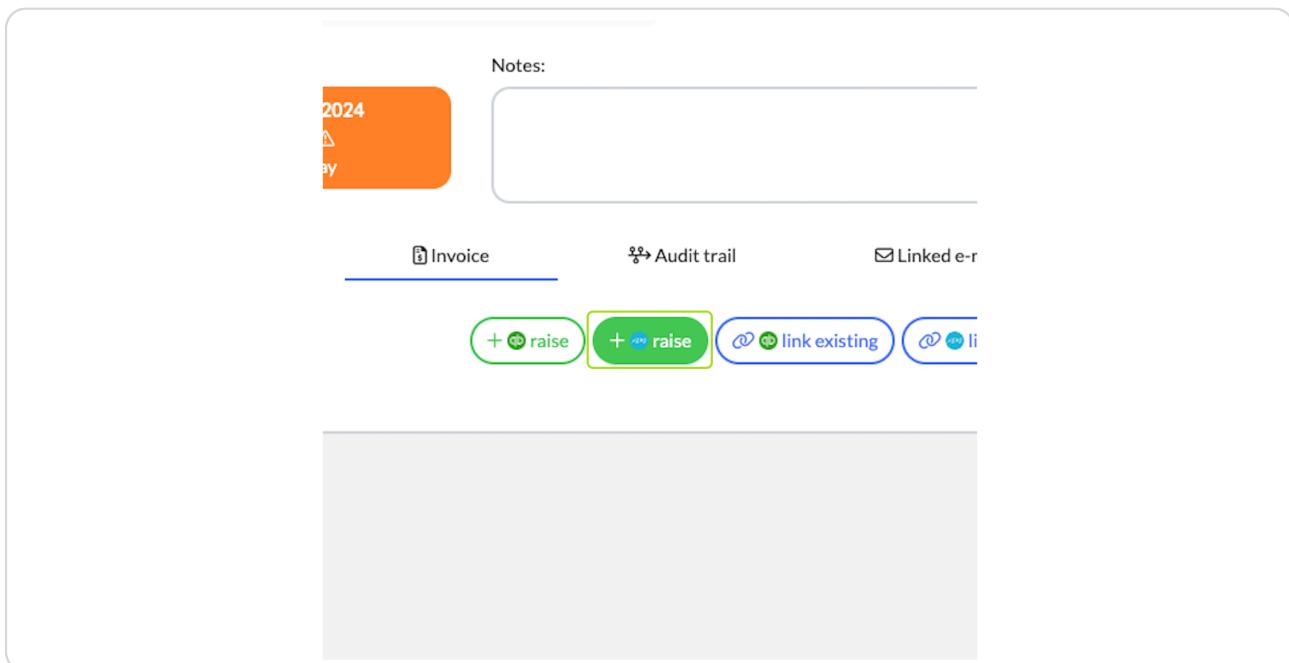
STEP 20

Click on the option you require, link or add invoice



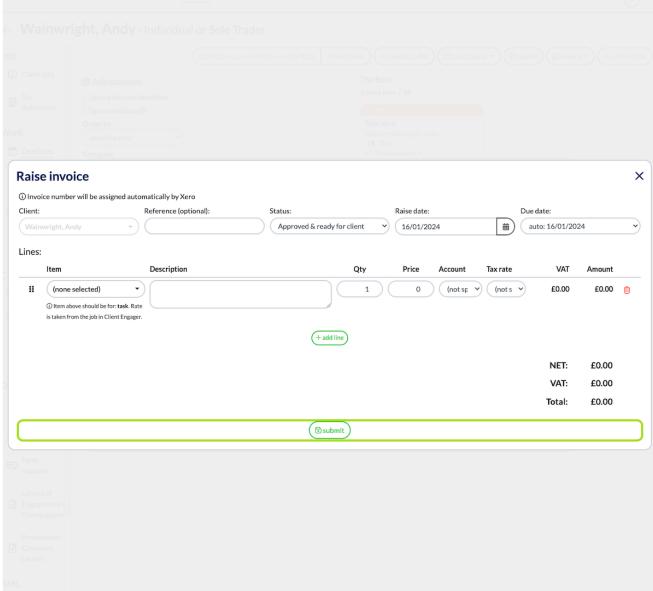
STEP 21

to create an invoice Click on raise



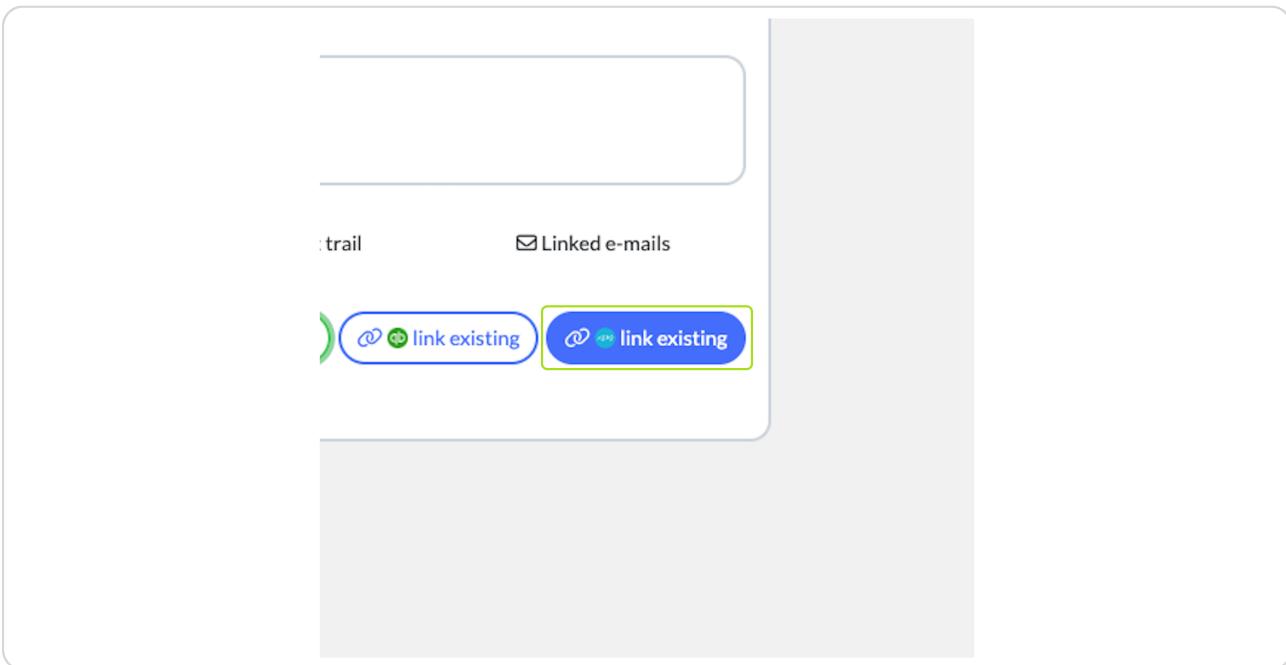
STEP 22

enter the details and Click on submit



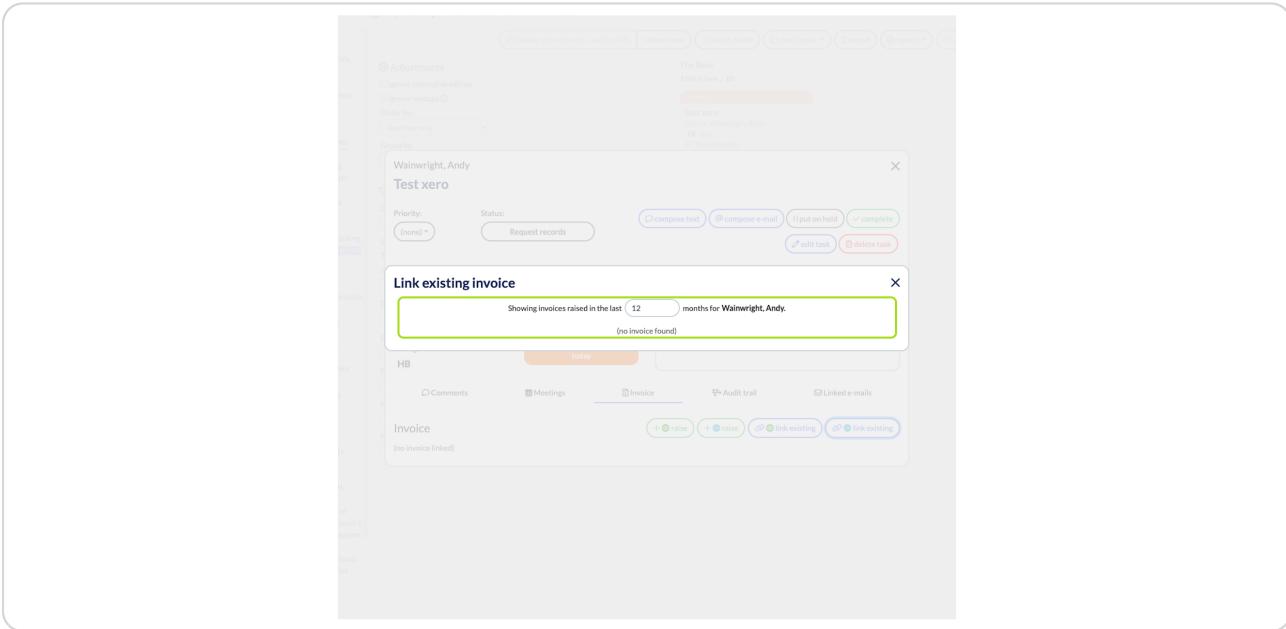
STEP 23

to link an invoice already in xero Click on link existing



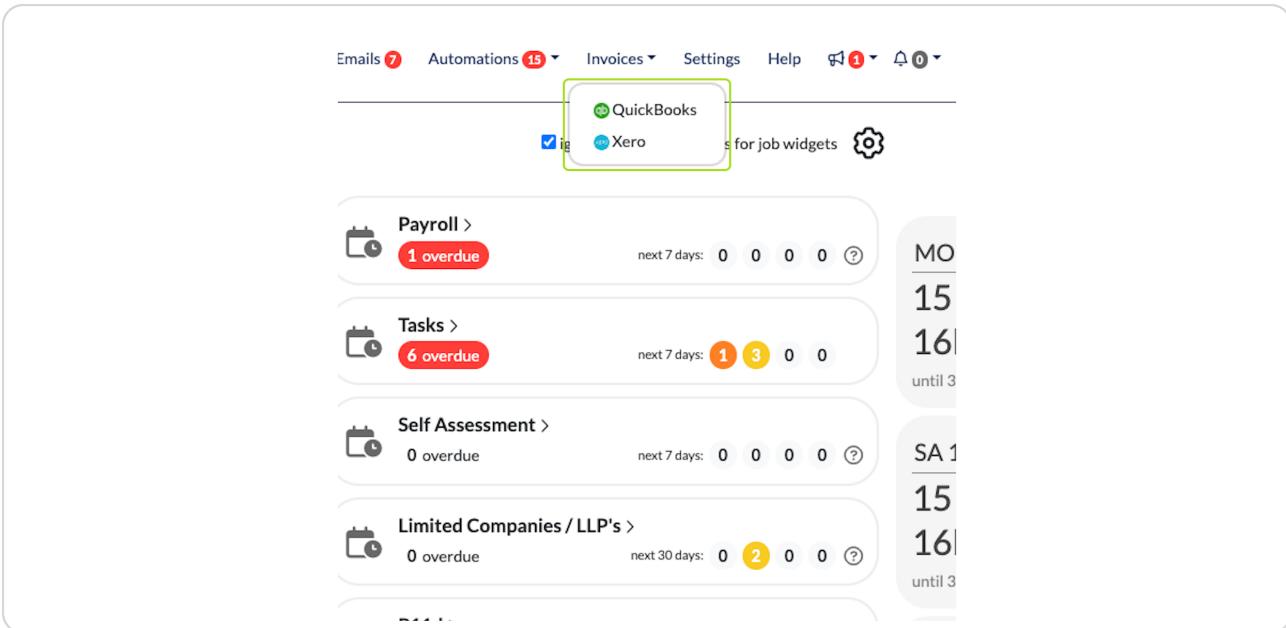
STEP 24

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



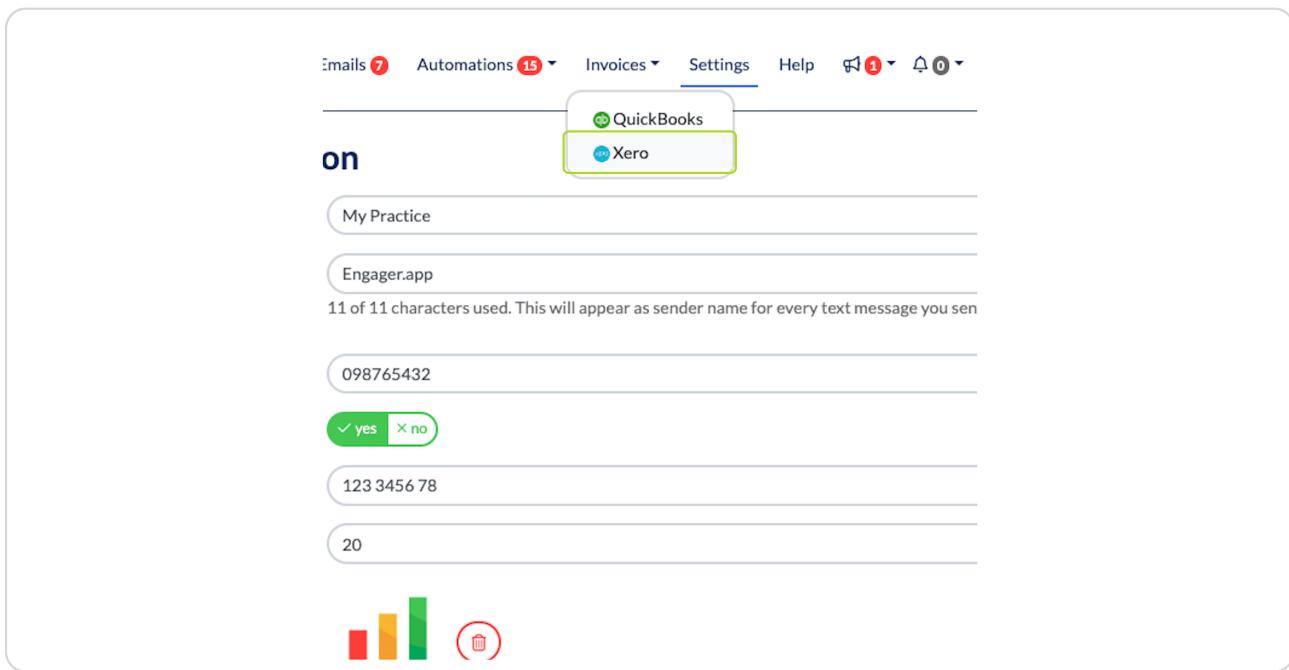
STEP 25

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



STEP 26

Click on Xero



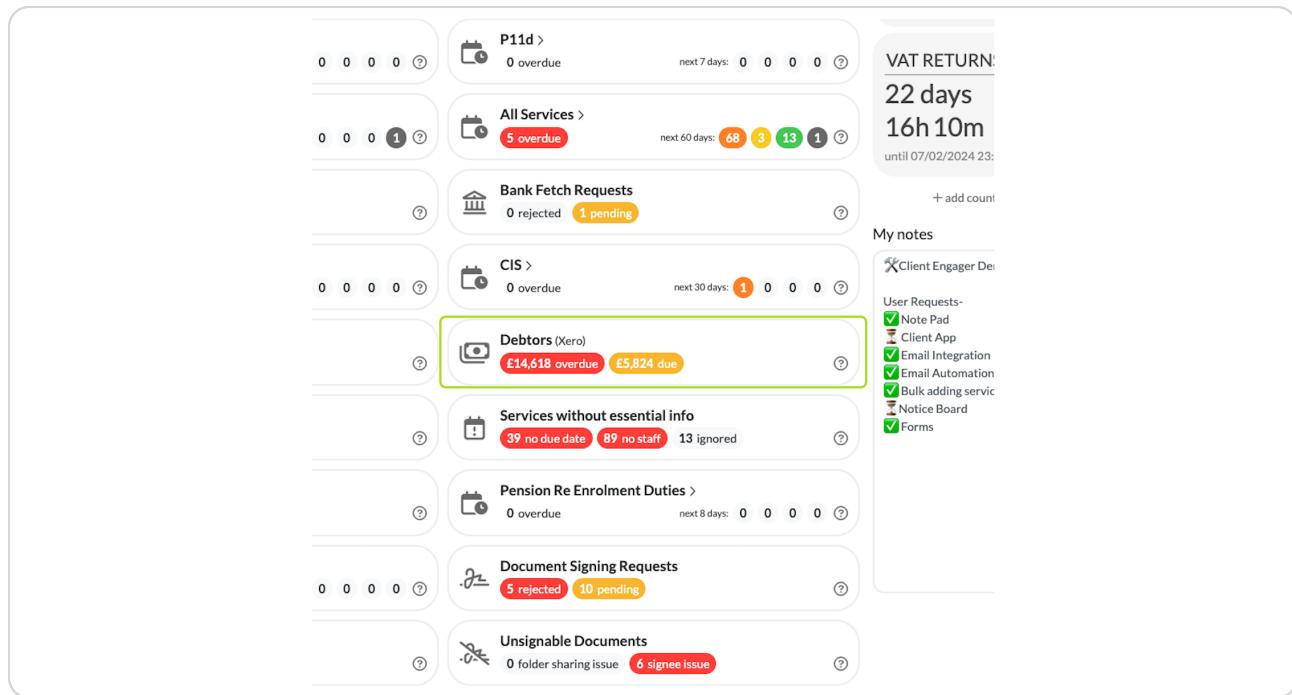
STEP 27

This view will then appear

No.	Client	Raise date	Amount	Balance	Status	Due date	Actions		
INV-001-0	Maddox Publishing Group	05/11/2022 1+ year ago	£4,200.00	£0.00	DEPOSITED	03/12/2022 1+ year ago			
INV-0001	Ridgeway University	24/12/2022 1+ year ago	£500.00	£0.00	DEPOSITED	03/01/2023 1+ year ago			
INV-0002	Ridgeway University	23/01/2023 11+ months ago	£500.00	£0.00	DEPOSITED	02/02/2023 11+ months ago			
INV-0003	Ridgeway University	23/02/2023 10+ months ago	£300.00	£0.00	DEPOSITED	09/03/2023 10+ months ago			
INV-0004	Ridgeway University	25/03/2023 9+ months ago	£1,000.00	£0.00	DEPOSITED	04/04/2023 9+ months ago			
INV-0005	Ridgeway University	25/04/2023 8+ months ago	£500.00	£0.00	DEPOSITED	05/05/2023 8+ months ago			
INV-0006	Ridgeway University	26/05/2023 7+ months ago	£500.00	£0.00	DEPOSITED	05/06/2023 7+ months ago			
INV-0007	Ridgeway University	25/06/2023 6+ months ago	£1,500.00	£0.00	DEPOSITED	05/07/2023 6+ months ago			
INV-0008	Ridgeway University	26/07/2023 5+ months ago	£500.00	£0.00	DEPOSITED	05/08/2023 5+ months ago			
INV-0009	Ridgeway University	25/08/2023 4+ months ago	£1,200.00	£0.00	DEPOSITED	04/09/2023 4+ months ago			
INV-0010	Ridgeway University	25/09/2023 3+ months ago	£500.00	£0.00	DEPOSITED	05/10/2023 3+ months ago			
INV-0012	Young Bros Transport	04/10/2023 3+ months ago	£541.25	£0.00	DEPOSITED	14/10/2023 3+ months ago			
INV-0015	Rex Media Group	04/10/2023 3+ months ago	£541.25	£0.00	DEPOSITED	14/10/2023 3+ months ago			
INV-0012	Hamilton Smith Ltd	04/10/2023 3+ months ago	£541.25	£0.00	DEPOSITED	14/10/2023 3+ months ago			
INV-0014	Port & Philip Freight	04/10/2023 3+ months ago	£541.25	£0.00	DEPOSITED	14/10/2023 3+ months ago			
INV-0016	Hamilton Smith Ltd	05/10/2023 3+ months ago	£541.25	£0.00	DEPOSITED	15/10/2023 3+ months ago			
INV-0017	City Limousines	07/10/2023 3+ months ago	£250.00	£250.00	OVERDUE	17/10/2023 2+ months ago			
INV-0019	Bank West	15/10/2023	£1,500.00	£0.00	DEPOSITED	25/10/2023			

STEP 28

We also have a widget summarising the debtors report in Xero



Tango

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