

User Manual



SFX – Salesforce Xero connector

- Automate your business, A solution that will reduce time
- Invoice/Bills/Credit Note automatically created in Xero
- Two-way Synchronization
- Multi-Xero Org and Multi-Currency
- Integrated eWAY Payment Gateway

Let's get started...

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Document Version

#	Version No.	Date	Notes
1	Document Version 1.0	8-Feb-2017	Basic SFX Connector
2	Document Version 1.1	4-Jul-2017	Process Builder
3	Document Version 1.2	21-Jun-2019	Sync Invoices
4	Document Version 1.3	16-Jul-2019	Multi-Currency and Multi-Org
5	Document Version 1.4	28-Jan-2020	Xero API upgrades
6	Document Version 1.5	13-Apr-2020	Enhancements
7	Document Version 1.6	11-May-2020	Invoice from Custom Object
8	Document Version 1.7	29-July-2020	Multiple Invoices on existing object on selected line items

1. Overview

Automate your business: A solution that will reduce time, creating a invoice from opportunity or a Invoice without opportunity, integrated payment gateway with (eWAY), instant sync with Xero.

- Invoice automatically created in Xero as draft, facility to submit as approved
- Integrated eWAY Payment gateway
- Online Payments (Partial / full) recorded both in Salesforce.com and Xero.
- Generate invoice from an opportunity in Salesforce.
- Auto Invoice creation using Process builder.
- Use Xero Invoice branding to generate invoice.
- Invoice automatically created in Xero as draft.
- A PDF format of Invoice created and stored in salesforce.com.
- Option to email Invoice.
- Email task recorded as Task in salesforce.com.
- Approve Invoice option of Xero directly managed within Salesforce.com.
- Integrated eWAY Payment gateway.
- Online Payments (Partial / full) recorded both in Salesforce.com and Xero.
- Reports & Dashboards.

Appexchange Link to install SFX:

<https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000EODsjUAH>

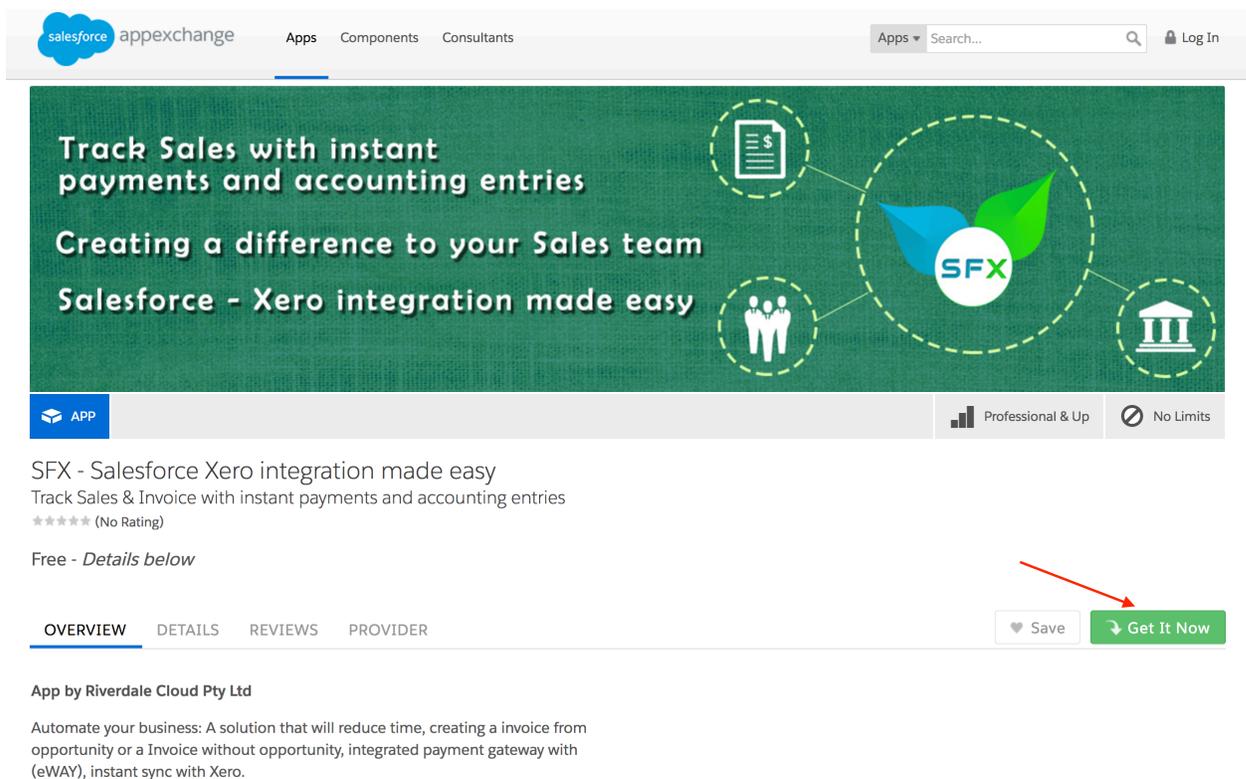
2. SFX requirement's

1. Salesforce – all versions
2. Xero – all editions
3. eWay (optional)

3. How to install SFX

Go to SFX Product page in the Appexchange.

<https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000EODsjUAH>



salesforce appexchange Apps Components Consultants Apps Search... Log In

Track Sales with instant payments and accounting entries
Creating a difference to your Sales team
Salesforce - Xero integration made easy

APP Professional & Up No Limits

SFX - Salesforce Xero integration made easy
Track Sales & Invoice with instant payments and accounting entries
★★★★★ (No Rating)
Free - Details below

OVERVIEW DETAILS REVIEWS PROVIDER Save Get It Now

App by Riverdale Cloud Pty Ltd
Automate your business: A solution that will reduce time, creating a invoice from opportunity or a Invoice without opportunity, integrated payment gateway with (eWAY), instant sync with Xero.

Click “Get It Now”

Follow options to “Login to AppExchange”

APP Professional & Up No Limits

SFX - Salesforce Xero integration made easy
Track Sales & Invoice with instant payments and accounting entries
★★★★★ (No Rating)
Free - Details below

OVERVIEW DETAILS REVIEWS PROVIDER Save Get It Now

To get this app, select one of the below options



- Log in to the AppExchange
Use your Salesforce credentials
- I don't have a login
Continue as a guest

Even if you plan to install into your sandbox, first login to the AppExchange using your production credentials.

Choose to “Install in production” or “Install in sandbox”

SFX - Salesforce Xero integration made easy
Track Sales & Invoice with instant payments and accounting entries
★★★★★ (No Rating)
Free - Details below

OVERVIEW DETAILS REVIEWS PROVIDER Save Get It Now

How would you like to continue?

- Install in production
Includes active, trial or developer orgs
- Install in Sandbox
Test in a copy of your production org

Read and Check “I have read and agree to the terms and conditions”, click Confirm and Install

OVERVIEW DETAILS REVIEWS PROVIDER Save Get It Now

Almost there!

 **salesforce.com, inc.** is not the provider of this application and has not conducted any review of it, security or otherwise. Please [click here](#) to understand what this means with respect to Salesforce's security and trust obligations.

WHAT YOU ARE INSTALLING	WHERE YOU ARE INSTALLING
PACKAGE SFX - Salesforce Xero integration made easy	ORGANIZATION Riverdale Cloud Pty Ltd
VERSION SFX (SFX / 1.23.0)	EDITION Developer
SUBSCRIPTION Free	USER NAME john1@riverdalecloud.com
DURATION Does Not Expire	
NUMBER OF SUBSCRIBERS Site-wide	

I have read and agree to the [terms and conditions](#) .

[Cancel Install](#) | [Back to previous step](#) Confirm and Install!

Login to your salesforce org, select the users and click on <Install>

Install SFX
By Riverdale Cloud Pty Ltd

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

Install **Cancel**

App Name	Publisher	Version Name	Version Number
SFX	Riverdale Cloud Pty Ltd	SFX-1.55	1.55

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

Select the SSL encryption and grant access for eWAY Payment gateway, Xero and SFX connector.

Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. What if you are unsure?

Website	SSL Encrypted
api.ewaypayments.com	<input checked="" type="checkbox"/>
api.xero.com	<input checked="" type="checkbox"/>
identity.xero.com	<input checked="" type="checkbox"/>
mdoc.riverdale.co.in	<input checked="" type="checkbox"/>

Yes, grant access to these third-party web sites

Continue **Cancel**

SFX package will now install in the selected Org.



Install SFX

By Riverdale Cloud Pty Ltd

**Installation Complete!**

[Done](#)

App Name	Publisher	Version Name	Version Number
SFX	Riverdale Cloud Pty Ltd	SFX-1.55	1.55

4. SFX Activation

- Click on App Launcher
- Select "SFX" App

SFX app can be selected from app launcher

App Launcher [Visit AppExchange](#)

▼ All Apps

**Service**
Manage customer service with accounts, contacts, cases, and more

**Marketing**
Best-in-class on-demand marketing automation

**Community**
Salesforce CRM Communities

**Site.com**
Build pixel-perfect, data-rich websites using the drag-and-dr... 

**Salesforce Chatter**
The Salesforce Chatter social network, including profiles and feeds

**Content**
Salesforce CRM Content

**SFX** 

**Sales**
Manage your sales process with accounts, leads, opportunities, and more

**Lightning Usage App**
View Adoption and Usage Metrics for Lightning Experience

Update details under the setup tab followed by clicking on <Activate Installation> to complete SFX activation.

 Setup & Configuration

[Click to download the user manual](#)

Org ID
00D90000788ZDCEAA

Organisation Name
Riverdale Cloud Pty Ltd

Street

City

State

Country

PostalCode

Contact Name

Contact Email

Contact Phone

[Activate Installation](#)



Click to download the user manual



Your fully-featured 14-day free trial is now active. **11** day/s are remaining for your trial period to expire
You have generated total **1** invoice/s in this month.

Click to Subscribe

Setup & Configuration

Org ID
00D2v0000

Organisation Name
Cloud Riverdale

Connect to Xero

Xero Multi Org Setup

No.	Connected Xero Org	Select/Change Xero Org	Active	Sync	Org Unique Id	Remove
-----	--------------------	------------------------	--------	------	---------------	--------

Add Org Save

Sync Invoices

Sync Xero Invoices Sync Configuration

SFX is now activated

Click on the button <connect XERO>

Upon clicking, you will be re-directed to Xero login



Log in to Xero

You're using the new Xero login experience

[Learn more](#)



Log in

[Forgot password](#)

[Can't log in](#)

Upon successfully logging in, you will be asked to allow access followed by connect to Xero org



SFX-TRIAL wants access to:

User account information



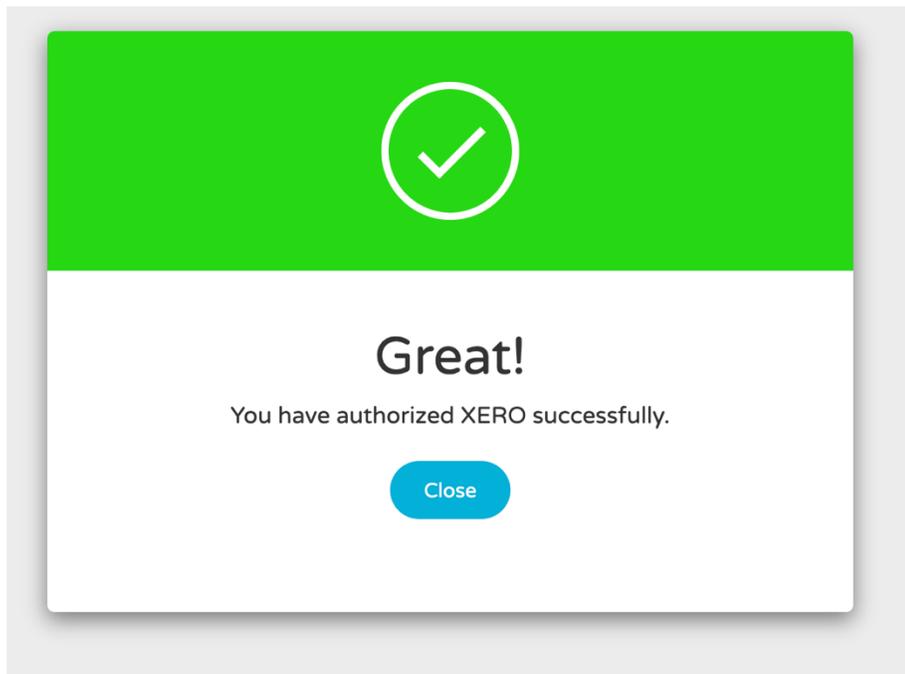
Your basic profile information and email address

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 your [Account Settings](#).

Allow Access

Cancel

You have now successfully authenticated Xero org



Click on <Select/Change Xero Org>

The screenshot shows the Salesforce SFX Setup & Configuration page. At the top, there is a navigation bar with the SFX logo and a search bar. Below the navigation bar, there is a status bar with the SFX logo and text: "Your fully-featured 14-day free trial is now active. 11 day/s are remain" and "You have generated total 1 invoice/s in this month." The main content area is titled "Setup & Configuration" and contains the following fields: "Org ID" (00D2v000), "Organisation Name" (Cloud Riverdale), and two buttons: "Re-connect to Xero" and "Select/Change Xero Org". A red arrow points to the "Select/Change Xero Org" button. Below the main content area, there is a section titled "Xero Multi Org Setup".

Select your Xero Org and click <Save>

The screenshot shows the Salesforce SFX Setup & Configuration page. At the top, there is a navigation bar with the SFX logo and a search bar. Below the navigation bar, there is a status bar with the SFX logo and text: "Your fully-featured 14-day free trial is now active. 11 day/s are remaining for your trial period to expire" and "You have generated total 1 invoice/s in this month." The main content area is titled "Setup & Configuration" and contains the following fields: "Org ID" (00D2v000001gABCD), "Organisation Name" (Cloud Riverdale), and two buttons: "Re-connect to Xero" and "Select/Change Xero Org". The "Select/Change Xero Org" button is clicked, and a dropdown menu is open, showing the selected org "WJCorp". Below the dropdown menu, there is a "Save" button.

You are now connected



All ▼ Search Salesforce



SFX

Home

SFX Setup

Accounts ▼

Contacts ▼

Opportunities ▼

Invoices/Bills ▼

Products



Your fully-featured 14-day free trial is now active. **11** day/s are remaining for your trial period to expire

You have generated total **1** invoice/s in this month.



Setup & Configuration

Org ID

00D2v000001gomaBACD

Organisation Name

Cloud Riverdale

Re-connect to Xero

Connected Primary / Default Xero Org

WJCorp

5. eWay Payment Gateway Setup

This feature is *optional* and configured if eWay is used as a Payment Gateway.

To setup eWay, click on <Setup> and search for “Custom Settings” in the quick find box found on the left panel.

Custom Settings Help for this Page ?

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Force.com Web Services API.

Percentage of custom settings data used: 0%
You are currently using 0 MB of custom settings data in your organization, out of an allowed limit of 2 MB.

View: All Create New View

Action	Label ↑	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Manage	Eway	Public	List	RDSFX	Eway Credentials	355	1	355
Manage	Eway Key	Public	List	RDSFX		355	0	0

Click on Manage to enter API+PASS for eWay

Custom Setting Definition

Eway

Help for this Page ?

Create the fields for your custom setting. The data in these fields are cached with the application.

Custom Setting Definition Detail Manage

Label	Eway	Object Name	Eway
API Name	RDSFX__Eway__c	Setting Type	List
Visibility	Public	Description	Eway Credentials
Namespace Prefix	RDSFX	Created Date	7/02/2017 9:21 AM
Last Modified Date	7/02/2017 9:21 AM	Record Size	355

Custom Fields New

Action	Field Label	API Name	Installed Package	Data Type	Indexed	Modified By
Edit	API+Pass	RDSFX__api_pass__c	SFX	Text Area(255)		as, 7/02/2017 9:21 AM

Enter the API Key and password from eWay as shown

Name should be "Eway Credentials"

API+Pass should be entered as per the given format "API Key"."Password" separated by colon ":"

For Example: C3AB9CoK/S5QImUXK8WdNrYF1VLixvKS4lCypteh9NElBo8L8IY6:Reset!123

Eway Edit

Provide values for the fields you created. This data is cached with the application.

Edit Eway

[Save](#) [Save & New](#) [Cancel](#)

Eway Information

Name	<input type="text" value="Eway Credentials"/>	i
API+Pass	<input type="text" value="C3AB9CoK/S5QImxbcm
oybz+3K0WUXkM0F7K8"/>	

Click on Manage to enter Ewaykeydata for Eway Key

Custom Setting Definition

Eway Key

Create the fields for your custom setting. The data in these fields are cached with the application.

Custom Setting Definition Detail

[Manage](#)

Label	Eway Key	Object Name	EwayKey
API Name	RDSFX__EwayKey__c	Setting Type	List
Visibility	Public	Description	
Namespace Prefix	RDSFX	Created Date	7/02/2017 9:21 AM
Last Modified Date	7/02/2017 9:21 AM	Record Size	355

Custom Fields

[New](#)

Action	Field Label	API Name	Installed Package	Data Type	Indexed	Modif
Edit	Ewaykeydata	RDSFX__Ewaykeydata__c	SFX	Text Area(255)		John

Enter the Ewaykeydata – Please note to copy and paste as-is the Name and Ewaykeydata as given below:

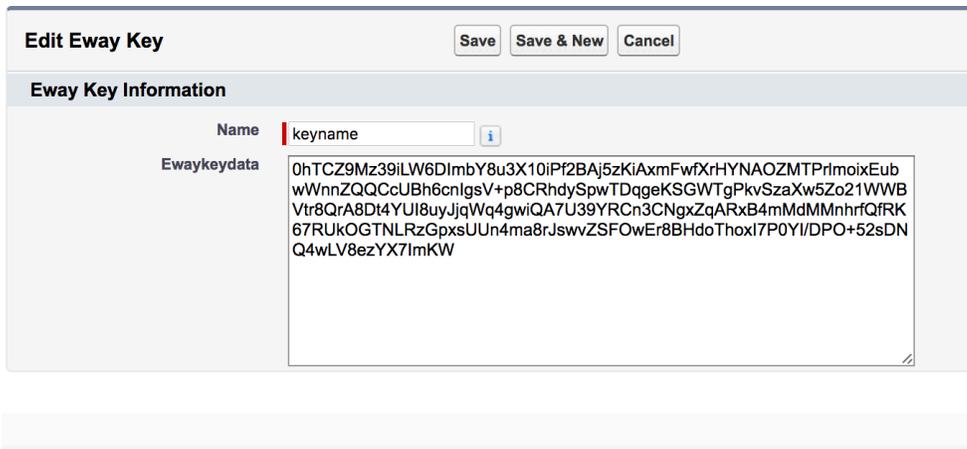
Name should be “**keyname**”

Ewaykeydata should be

```
0hTCZ9Mz39iLW6DImbY8u3X10iPf2BAj5zKiAxmFwfXrHYNAOZMTPrlmoixEubwWnnZQQ  
CcUBh6cnlgsV+p8CRhdySpwTDqgeKSGWTgPkvSzaXw5Zo21WWBVtr8QrA8Dt4YUI8uyJjq  
Wq4gwiQA7U39YRCn3CNgxZqARxB4mMdMMnhrfQfRK67RUKOGTnlRzGpxsUUn4ma8rJ  
swvZSFOWEr8BHdoThoxl7P0YI/DPO+52sDNQ4wLV8ezYX7ImKW
```

Eway Key Edit

Provide values for the fields you created. This data is cached with the application.



The screenshot shows a web form titled "Edit Eway Key" with three buttons: "Save", "Save & New", and "Cancel". Below the buttons is a section titled "Eway Key Information". It contains two fields: "Name" with the value "keyname" and "Ewaykeydata" with a long alphanumeric string. The string is: 0hTCZ9Mz39iLW6DImbY8u3X10iPf2BAj5zKiAxmFwfXrHYNAOZMTPrlmoixEubwWnnZQQCcUBh6cnlgsV+p8CRhdySpwTDqgeKSGWTgPkvSzaXw5Zo21WWBVtr8QrA8Dt4YUI8uyJjqWq4gwiQA7U39YRCn3CNgxZqARxB4mMdMMnhrfQfRK67RUKOGTnlRzGpxsUUn4ma8rJswvZSFOWEr8BHdoThoxl7P0YI/DPO+52sDNQ4wLV8ezYX7ImKW.

Add another record and update the fields **Name** and **Ewaykeydata** with following:
(Please note to copy and paste as-is)

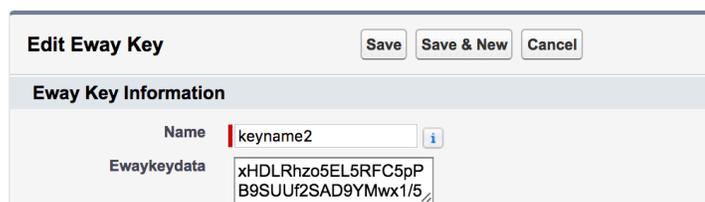
Name should be “**keyname2**”

Ewaykeydata should be

```
xHDLRhzo5EL5RFC5pPB9SUUf2SAD9YMwx1/5x+MDDxY1E8HcrSqBYulaxUdJg+KfMOQH6  
XhYpaz6MbOLu8ZH0bw==
```

Eway Key Edit

Provide values for the fields you created. This data is cached with the application.



The screenshot shows a web form titled "Edit Eway Key" with three buttons: "Save", "Save & New", and "Cancel". Below the buttons is a section titled "Eway Key Information". It contains two fields: "Name" with the value "keyname2" and "Ewaykeydata" with a long alphanumeric string. The string is: xHDLRhzo5EL5RFC5pPB9SUUf2SAD9YMwx1/5x+MDDxY1E8HcrSqBYulaxUdJg+KfMOQH6XhYpaz6MbOLu8ZH0bw==.

6. SFX Configuration:

Adding <New Invoice> button on the Opportunity page for Classic

Edit opportunity layout, drag the <New Invoice> button on to the Custom buttons area on the page, save the layout.

The screenshot displays the Salesforce SFX Configuration interface. At the top, there is a toolbar with buttons for 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. Below the toolbar is a 'Fields' sidebar with a 'Buttons' section. The 'Buttons' section contains a 'Quick Find' search bar and a list of buttons: 'Change Owner', 'Edit', 'Submit for Approval', 'Change Record Type', 'New Invoice', 'Clone', 'Send an Email', and 'Delete', 'Sharing'. A red arrow points from the 'New Invoice' button in the 'Buttons' section to the 'New Invoice' button in the 'Custom Buttons' area of the 'Opportunity Detail' layout.

Salesforce1 and Lightning Experience

Actions

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Salesforce1 and Lightning Experience pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Opportunity Detail

Standard Buttons: Edit Delete Clone Change Owner Change Record Type Sharing Send an Email

Custom Buttons: New Invoice

Opportunity Information (Header visible on edit only)

Opportunity Owner	Sample User	Amount	\$123.45
Private	<input checked="" type="checkbox"/>	Expected Revenue	\$123.45
Opportunity Name	Sample Opportunity Name	Close Date	7/02/2017
Account Name	Sample Account	Next Step	Sample Next Step
Type	Sample Type	Stage	Sample Stage
Lead Source	Sample Lead Source	Probability (%)	679%
		Primary Campaign Source	Sample Campaign

Other Information (Header visible on edit only)

Adding <New Invoice> button on the Opportunity page for lightning

The screenshot shows the Salesforce Setup interface for configuring the Opportunity page layout. The left sidebar lists navigation options, with 'Page Layouts' selected. The main content area shows the 'Mobile & Lightning Actions' table and the 'Salesforce Mobile and Lightning Experience Actions' section. A red arrow points from the 'New Invoice' button in the 'Mobile & Lightning Actions' table to the 'New Invoice' button in the 'Salesforce Mobile and Lightning Experience Actions' section.

Mobile & Lightning Actions Table:

Change Owner	Delete	Link	New Case	New Invoice	New Task	Question
Change Record Type	Edit	Log a Call	New Contact	New Lead	Poll	Sharing
Clone	Email	Mobile Smart Actions	New Event	New Note	Post	Submit for Approval
Clone with Related	File	New Account	New Group	New Opportunity	Printable View	

Salesforce Mobile and Lightning Experience Actions:

Post File New Task Log a Call New Case New Event Link Poll Question Email Change Record Type

New Invoice

7. Creating a New Invoice:

New Invoice button is displayed on the Opportunity layout, this button will enable to create an Invoice

A New Invoice will be created in Xero for:

INVOICE DETAILS

Invoice Number: Invoice number generated by Xero

Contact: [Search]

Invoice Date: [6/19/2019]

Status: DRAFT

Account: [Search]

Opportunity: [Search]

Due Date: [6/19/2019]

Branding: [Dropdown]

Invoice Line Item Details

Remove	Description	Quantity	Unit Price	Accounts	Discount Rate(%)	Tax Rate
X				--None--		-- Select --
X				--None--		-- Select --

There are two options to add products to the Invoice; you could either add any product, which are not related to the opportunity line items or just Click on the button “Copy Opportunity line items”. This will copy all the products added to the related opportunity.

Note: Remember to select the correct Tax rate as defined in Xero

Invoice is generated and the same invoice is created instantly in Xero with the same invoice number.

Related	Details
Invoice Number	INV-0034
Invoice Date	5/31/2019
Due Date	6/3/2019
Invoice Approved Date	6/3/2019 5:00 AM
Sub Total	\$768.00
Total Tax	\$0.00
Total Amount	\$768.00
Xero Link	https://go.xero.com/AccountsReceivable/Edit.aspx?invoiceID=a96756e1-5351-4acc-a1dc-3ab8b6b6951a
Reference	56163e2e-9212-4a88-8713-176f9bc2d080

Activity
New Event
New Task
Log a Call
Create new...
Add
Filters: All time · All activities · All types
Refresh Expand All
Next Steps
More Steps
No next steps. To get things moving, add a task or set up a meeting.
Past Activities
No past activity. Past meetings and tasks marked as done show up here.
Load More Past Activities

Features on Invoice Detail page:

- Generate PDF: A pdf format Invoice is generated for printing purpose, stored under notes and attachment's
- Send Invoice: Email the Invoice to the selected contact, upon generating PDF. History captured under activity history.
- Approve Xero Invoice: Enable to approve the Invoice, this changes the status of the invoice to Approved both in Salesforce and Xero. Note: Once this is done, you will be unable to edit/modify the approved invoice in XERO
- eWay PAY: This button will enable to take instant credit card payments

Alternately related list <Payments> on the Invoice object will enable you to record any Bank related transactions.

8. Emailing Invoice

To Email invoice, first generate pdf and then use the <Send invoice> button to send the invoice via email to the selected contacts.

 Secure | <https://rdsfx.ap4.visual.force.com/apex/EmailSender?recordid=a046F00001FgCAk&accountid=0016F00001uHTCK>

Send Invoice Send Email

Select Contact

Note: Max 5 recipients can be added at once.

▶

Select Template

-None-

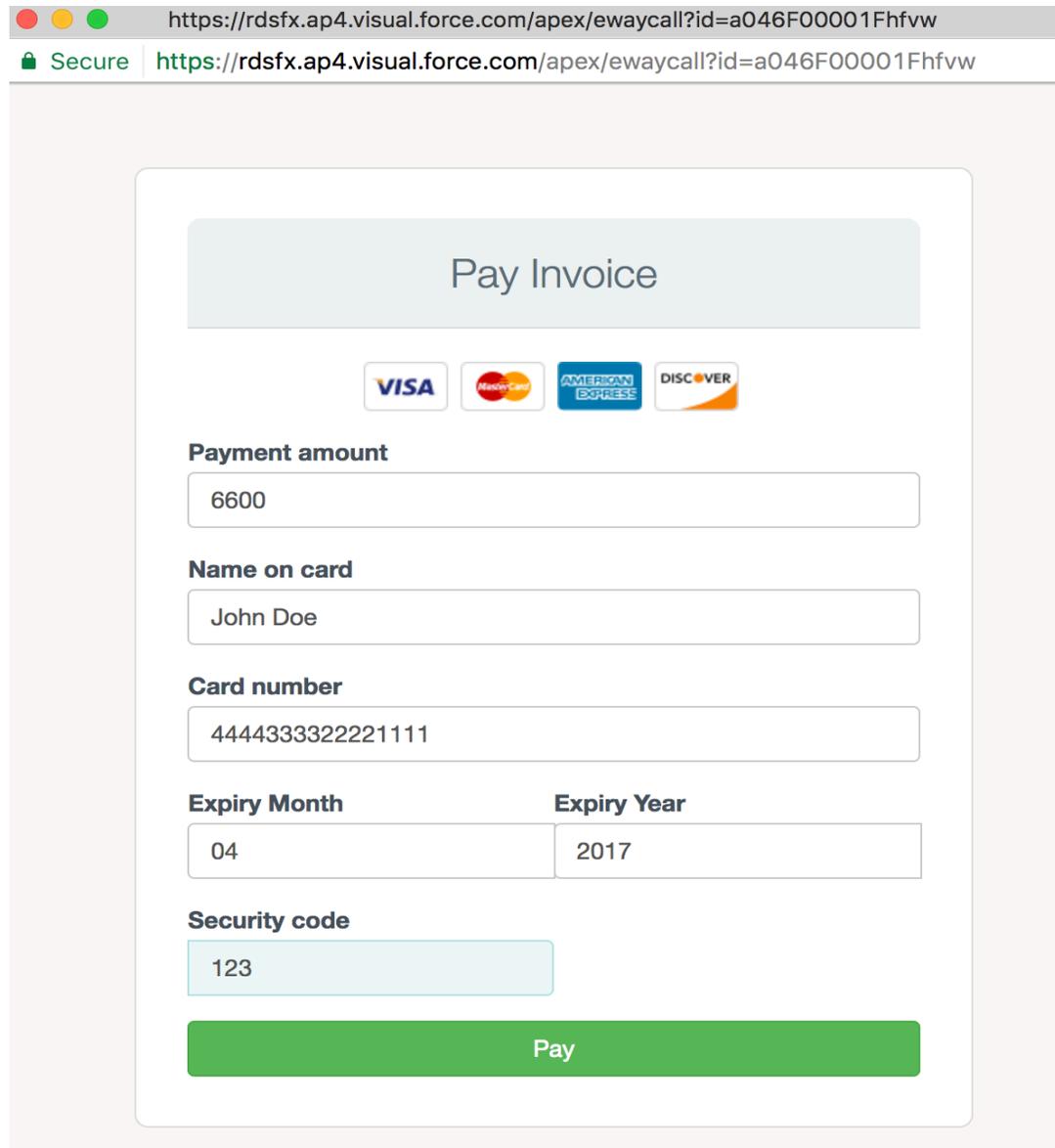
Attach Invoice

File Name	Last Modified Date	Owner	View
<input type="checkbox"/> ORC1040	7/02/2017 10:32 AM	John	View Link

Send Email

9. Payment processing via eWay

Click on eWay Pay button. This will open a pop-up a window with Pending Invoice amount and option to enter *Card details followed by clicking on PAY button.



The screenshot shows a web browser window with the URL <https://rdsfx.ap4.visual.force.com/apex/ewaycall?id=a046F00001Fhfvw>. The page is titled "Pay Invoice" and features a form for entering card details. The form includes the following fields:

- Payment amount:** 6600
- Name on card:** John Doe
- Card number:** 4444333322221111
- Expiry Month:** 04
- Expiry Year:** 2017
- Security code:** 123

At the bottom of the form is a green "Pay" button. Above the form, there are logos for VISA, MasterCard, AMERICAN EXPRESS, and DISCOVER.

Payments are processed by eWay and transaction detail updated back to Salesforce Invoice under eWay Transactions.

On successful transaction payment detail is updated to Xero.

*Card details are managed by eWay, no details are stored in Salesforce.

10. Other Payments

The other payments can be used to capture payments for instance bank payments, which is then recorded in Salesforce & Xero

https://rdsfx.ap4.visual.force.com/apex/paymentpage?id=a046F00001Fhfww

Secure https://rdsfx.ap4.visual.force.com/apex/paymentpage?id=a046F00001Fhfww

Pay Invoice

Payment amount

Payment Date

[8/02/2017]

Payment Description

Pay

Upon successful payment, Transaction details are updated under Payments and eWay Transactions related list.

The screenshot displays a software interface for managing an invoice. At the top, it shows 'Invoice INV-0013' with navigation options like 'New Contact', 'Edit', and 'New Opportunity'. The main area is divided into 'Related' and 'Details' sections. Under 'Related', there are three sub-sections: 'Invoice Line Item (1)', 'Payments (0)', and 'Eway Transactions (0)'. The 'Payments (0)' and 'Eway Transactions (0)' sections are highlighted with a red border. Below these is a 'Notes & Attachments (0)' section with an 'Upload Files' button. On the right side, there is an 'Activity' panel with tabs for 'New Event', 'New Task', and 'Log a Call'. A dropdown menu is open, showing options like 'New Case', 'New Lead', 'Printable View', 'Generate PDF', 'Send Invoice', 'Approve Xero Invoice', 'Eway Pay', and 'Other Pay'. Red arrows point from the 'Eway Pay' and 'Other Pay' options to the 'Payments (0)' and 'Eway Transactions (0)' sections respectively. Below the dropdown, there are sections for 'Next Steps' and 'Past Activities', each with a 'More Steps' or 'Load More Past Activities' button.

INVOICE LINE ITEMS NAME	DESCRIPTION	QUANTITY	UNITAMOUNT
TR-00002330	Test Opp M-Doc 10 GB - Test Desc	2.00	550.00

11.Xero Tax / Branding

Click on the <Xero Tax/Branding > tab followed by clicking on the button <Get Xero Tax Codes>

This will retrieve tax codes from your Xero Org

Update these <Xero Tax Codes> values highlighted in the image to <Opportunity Products> object custom field <Xero Tax Code> picklist.

GET XERO TAX CODES	GET XERO BRANDING THEME ID	GET ACCOUNT CODES		
TAX NAME	TAX CODE	TAX VALUE	BRANDING THEME NAME	BRANDING THEME ID
Sales Tax on Imports	GSTONIMPORTS	0.0		
Tax on Purchases	INPUT	0.0		
Tax Exempt	NONE	0.0		
Tax on Sales	OUTPUT	0.0		
ACCOUNTS NAME	ACCOUNT CODES			

For Branding click on <Get Xero Branding Theme Id>

Update the custom field <Xero Branding Theme> of Opportunity object. The values should be the “Branding Theme Name” in this example the value is “Standard”

GET XERO TAX CODES	GET XERO BRANDING THEME ID	GET ACCOUNT CODES		
TAX NAME	TAX CODE	TAX VALUE	BRANDING THEME NAME	BRANDING THEME ID
Sales Tax on Imports	GSTONIMPORTS	0.0	Standard	00b5b08d-970e-4467-90da-98e3a6ac3e0c
Tax on Purchases	INPUT	0.0		
Tax Exempt	NONE	0.0		
Tax on Sales	OUTPUT	0.0		

For Account Codes click on <Get Account Codes>

GET XERO TAX CODES

GET XERO BRANDING THEME ID

GET ACCOUNT CODES

TAX NAME	TAX CODE	TAX VALUE	BRANDING THEME NAME	BRANDING THEME ID
Sales Tax on Imports	GSTONIMPORTS	0.0	Standard	00b5b08d-970e-4467-90da-98e3a6ac3e0c
Tax on Purchases	INPUT	0.0		
Tax Exempt	NONE	0.0		
Tax on Sales	OUTPUT	0.0		

ACCOUNTS NAME	ACCOUNT CODES
(REVENUE) 200-Sales	200
(REVENUE) 260-Other Revenue	260
(REVENUE) 270-Interest Income	270
(DIRECTCOSTS) 310-Cost of Goods Sold	310
(EXPENSE) 400-Advertising	400

12.Auto Invoice Creation using Process Builder

Invoice auto creation and updating is based on the opportunity create, edit and condition mentioned in Process builder.

Conditions are based on use cases such as Opportunity Stage = “Closed won” or as required by the business.

Following configuration is for an example where **Opportunity Stage = “Closed won”** and is applicable in two different scenarios.

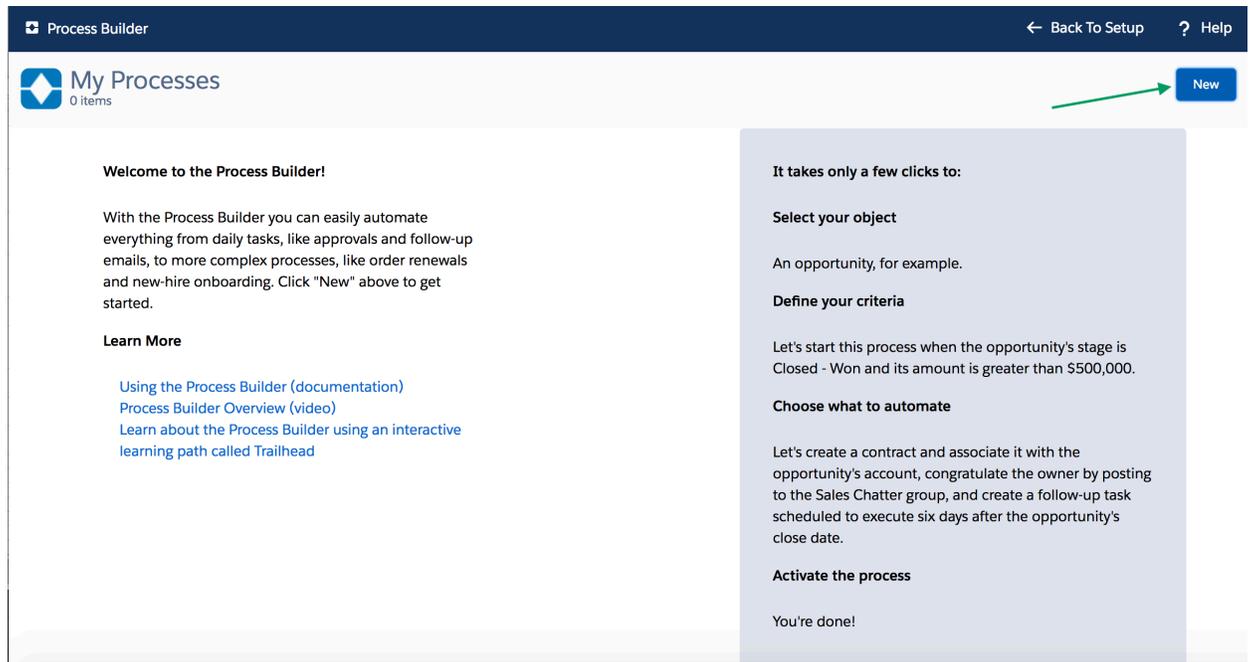
Scenario 1: *New Invoice Creation*

Invoice auto-creation is based on creating of new opportunity, condition being Opportunity Stage = “Closed won”

Scenario 2: *Edit Opportunity line item* (for an opportunity with existing Invoice)

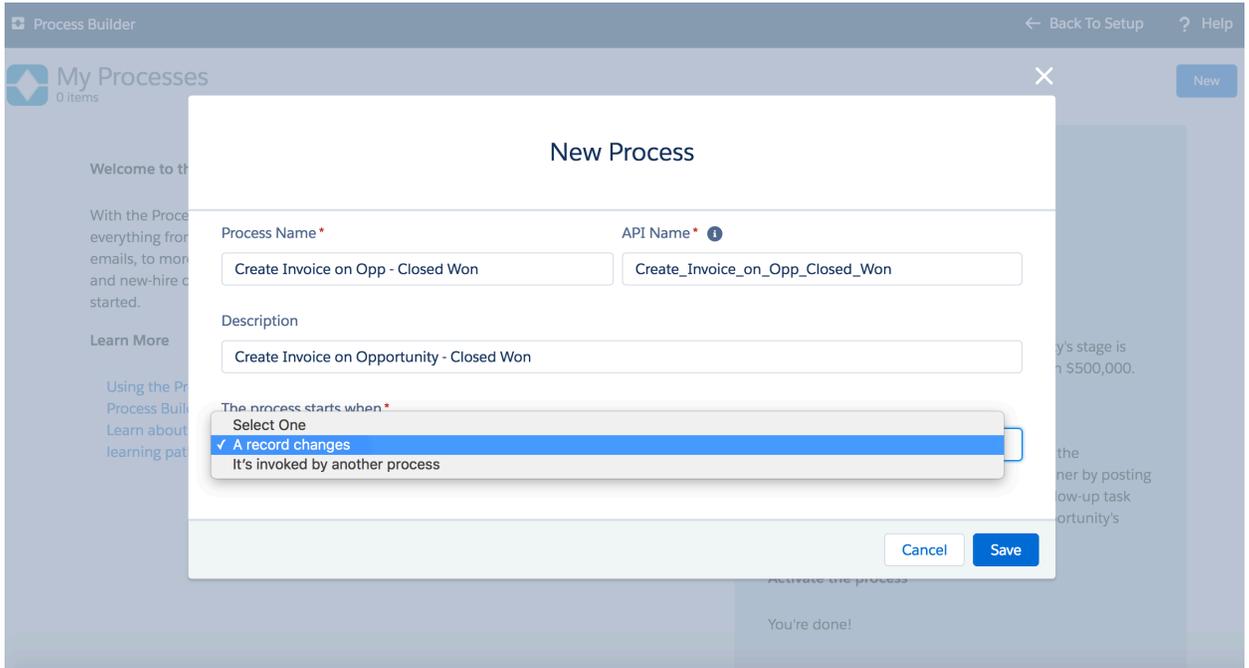
In a scenario where the opportunity line items have to be modified, the Invoice is auto updated, only upon editing the opportunity

To setup a Process Builder, click on <Setup> and search for “Process Builder” in the quick find box found on the left panel.

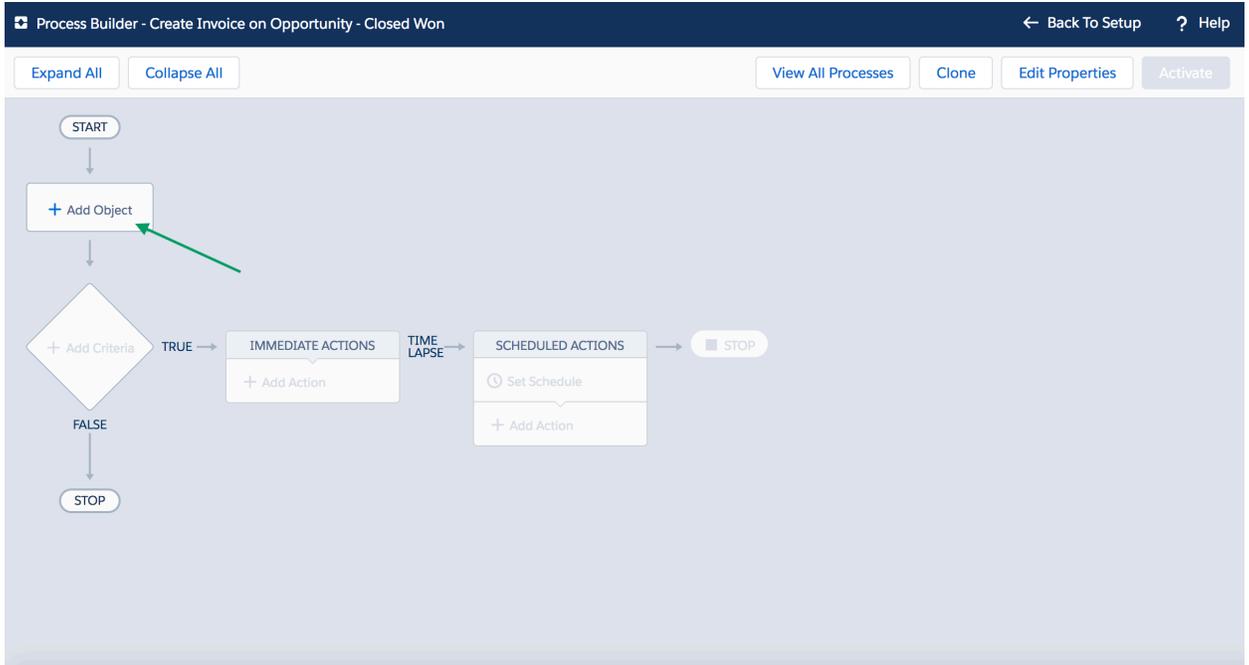


Click on <New> button to create a new process.

Add a Process name as “Create Invoice on Opportunity – Stage”



Select the Object, in this case “Opportunity”



Process Builder - Create Invoice on Opportunity - Closed Won

Expand All Collapse All View All Processes Clone Edit Properties Activate

Choose Object and Specify When to Start the Process

Object *
Opportunity

Start the process *
 only when a record is created
 when a record is created or edited

> Advanced

Save Cancel

Add the Criteria as shown in the diagram below, in this case Opportunity Stage = “Closed Won”

Process Builder - Create Invoice on Opportunity - Closed Won

Expand All Collapse All View All Processes Clone Edit Properties Activate

Define Criteria for this Action Group

Criteria Name *
Opp - Closed Won

Criteria for Executing Actions *
 Conditions are met
 Formula evaluates to true
 No criteria—just execute the actions!

Set Conditions

Field *	Operator *	Type *
1 [Opportunity]... Q	Equals	Picklist

+ Add Row

Conditions *
 All of the conditions are met (AND) **Opportunity Stage**
 Any of the conditions are met (OR)

Save Cancel

- Select One
- Prospecting
- Qualification
- Needs Analysis
- Value Proposition
- Id. Decision Makers
- Perception Analysis
- Proposal/Price Quote
- Negotiation/Review
- Closed Won
- Closed Lost

Next add Action. For the action select “Apex”, provide a name and select the Apex class “SFX-AutoInvoice”

The screenshot displays the Salesforce Process Builder interface for a process named "Create Invoice on Opportunity - Closed Won". The process flow starts with a "START" node, followed by an "Opportunity" object. A decision diamond labeled "Opp - Closed Won" has a "TRUE" path leading to an "IMMEDIATE ACTIONS" box with an "Add Action" button, and a "FALSE" path leading to another decision diamond with an "Add Criteria" button. The "Add Action" button is highlighted with a green arrow. To the right, the "Select and Define Action" configuration panel is open. It shows "Action Type" set to "Apex" (indicated by a green arrow), "Action Name" set to "SFX Auto Invoice", and "Apex Class" set to "SFX-AutoInvoice" (indicated by a green arrow). Below, the "Set Apex Variables" section has a table with one row: "OpportunityIds" (Field), "Reference" (Type), and "[Opportunity].Id" (Value). The "Type" dropdown is also indicated by a green arrow. "Save" and "Cancel" buttons are at the bottom.

Followed by “Set Apex Variable”,

Select Field as OpportunityIds

Select Type as reference and

Select Value as Opportunity.ID

Save and **Activate** the Process builder.

Pre-requisite on Opportunity Create or Update:

- Opportunity should be linked to Account
- Opportunity should have line items with Xero Tax code values (Refer Index#13)
- Opportunity contact role with primary contact
- Opportunity should have “Xero Branding Theme” values updated

NOTE:

- Editing of opportunity line items of an existing Invoice is based on editing the Opportunity
- Any Invoice with Status as “Authorised” cannot be edited or modified via Process builder
- In case of an additional invoice existing on the opportunity object, the invoice with latest date/time stamp is updated via the Process builder upon editing and saving the Opportunity

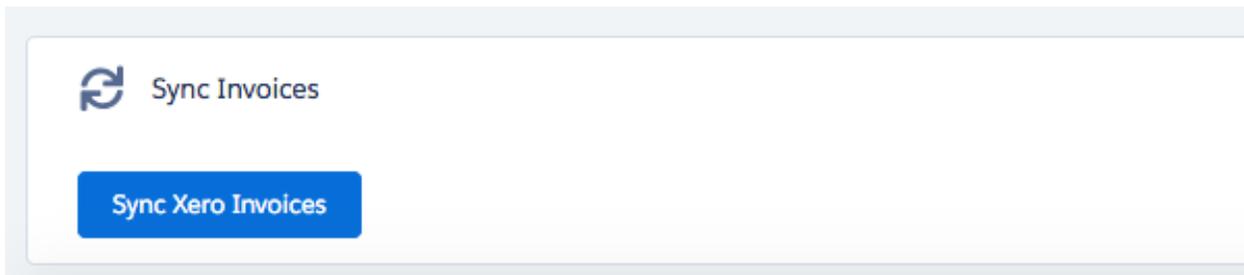
13.Sync Invoices

SFX can sync invoices from Xero to Salesforce . Two types of sync provided by SFX.

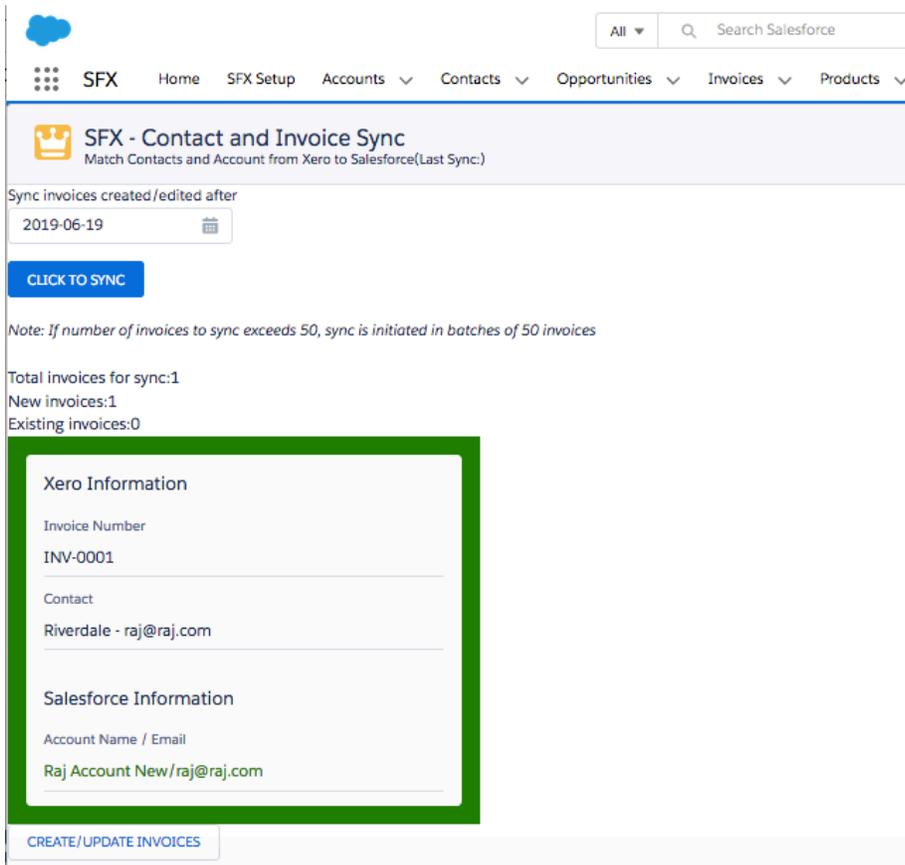
- Auto sync
- Manual sync

Manual Sync

You can sync invoices from SFX setup tab



Click on a date to sync invoices created/updated after selected date



Account and contact auto matched by email if already exists in salesforce.

If account and contact are new then user can manually map from xero contact.

If more than 50 invoices, sync can be completed by batches of 50 invoices.

On clicking create/update invoices, new invoices will be created in salesforce and existing will be updated. Logs can be tracked under SFX Logs tab.

The screenshot displays the SFX Logs interface. At the top, there is a navigation bar with the SFX logo and a search bar labeled "Search SFX Logs and more...". Below the navigation bar, the main content area shows the details for a specific log entry. The log entry is titled "SFX Logs L-0000067" and is owned by "Sandeep Kotian". The details are organized into two columns: "Related" and "Details".

Related	Details
SFX Logs Name L-0000067	Owner Sandeep Kotian
Sync type Manual sync - Xero to SF	
Log Message Following invoices created/updated.INV-0001,	
Status Success	
Created Date Time 6/19/2019 6:23 AM	
Created By Sandeep Kotian, 6/19/2019 6:23 AM	Last Modified By Sandeep Kotian, 6/19/2019 6:23 AM

Auto Sync

Every 15 mins New invoices / existing invoices created or updated from Xero to Salesforce. Logs can be tracked under SFX Logs tab

14. Invoice from Custom Object

Mapping

Select SFX app, click on the “Xero Custom Object Mapping”

Create a new record with the below parameters

Invoice can be generated from a **single custom object** or from an object with a child object. Child object is where your line items are stored.

To generate invoice from custom object, the objects should have the below **mandatory** fields

- Name
- Invoice/Bill Object
- SFX Invoice Lookup field (In the RDSFX Invoice object, create a lookup field to your custom object which you want to use for Invoicing)
- Invoice Account Lookup Field
- Invoice Contact Lookup Field (ensure your contact has a email id, which is mandatory to create and map invoice in Xero)
- Line Item Qty field
- Line Item Unit Price field

Ensure the above fields are existing in the respective custom object(s) and the API name used in the “Xero Custom Object Mapping” layout.

To create Invoice from **two custom objects**, a master and a child object(viz, line items object)

- If child object is used, please be sure to map the relevant API names from the child object.
- A typical child object will contain fields such as Product description, price, quantity, discount, account code and tax code.

Refer the screen shot below

New Xero Custom Object Mapping

Basic Mapping

* Xero Custom Object Mapping Name

Mapping ID

a0J2w0000002MUQ

* Invoice/Bill Object i

Invoice/Bill Line Item Object i

* SFX Invoice Lookup Field i

Lookup Field LineItem to Invoice i

Xero Invoice Object Mapping

Xero Branding Theme Field i

Invoice Reference Field i

* Invoice Account Lookup Field i

* Invoice Contact Lookup Field i

Invoice Address Mapping

Invoice Date Field i

Invoice Due Date Field i

Xero Org Unique Id Field

Tax Exclusive/Inclusive Field i

Invoice / Bill Type Field i

Currency Code Field i

Xero Invoice Line Item Object Mapping

Line Item Item Code Field

Line Item Description Field i

* Line Item Quantity Field i

* Line Item UnitPrice Field

Line Item Xero Account Code i

Line Item Xero Tax Rate i

Line Item Discount Field i

A Mapping id is generated and displayed on the layout for use of Invoice creation

Creating “New Invoice” button from Custom Object

Go to the custom object nominated as your Invoice Master from the setup

Select the object

Go to <Buttons, Links and Actions>

Select <New Button or Link>

Give a label name <New Invoice>

Select the option <Detail page button>

In the formula section, enter the below function with parameters

`/apex/RDSFX__InvoicePage?mappingid=<mappingID>&recordid={!<CustomObject.Id>`

Ex: `/apex/RDSFX__InvoicePage?mappingid=a0S0o00001h7M&recordid={!Energy_Audit__c.Id}`

Ensure the characters <, >, and any space in-between the formula is removed

For the mapping id refer Mapping section

NOTE: Ensure there is no extra spaces in-between the formula

The screenshot shows the Salesforce Setup interface for configuring a custom button or link. The breadcrumb is 'SETUP > OBJECT MANAGER' and the object is 'energy audit'. The page title is 'Edit energy audit Custom Button or Link' and the button name is 'New Invoice'. The 'Custom Button or Link Edit' section includes fields for Label ('New Invoice'), Name ('New_Invoice'), and Description. The 'Display Type' is set to 'Detail Page Button' (indicated by a red arrow). The 'Behavior' is 'Display in new window' and the 'Content Source' is 'URL'. The formula in the 'Content Source' field is: `/apex/RDSFX__InvoicePage?mappingid=a0J2w000002MUQ&recordid={!energy_audit__c.Id}`. The 'Functions' panel on the right shows a list of functions including ABS, ADDMONTHS, AND, BEGINS, BLANKVALUE, and CASE.

Remember to add the <New Invoice button> on the page layout.

15. Automate Invoice creation on a Custom object using Process Builder

To automate the invoice creation, add a criteria such as on changing a stage, ideally a pick list field on the custom object.

Create a process with the criteria that is required to satisfy and initiate an Invoice creation.

Add action, select Action Type as APEX, give a name. Select SFX-CustomObjectInvoice Apex class

Click on “Add Row”

In the field section select parameterIds, Type should be formula.

For the formula use the below function with required parameters

```
'recordid='+<record id field>+'&mappingid=<mappingid>'
```

Ex: 'recordid='+[Energy_Audit__c].Id+'&mappingid=a0S0o00001lhu7M'

NOTE: Ensure there is no extra spaces in-between the formula

Click Save followed by activating the process builder

The screenshot displays the Salesforce Process Builder interface for a process named 'energy audit'. The flowchart on the left shows a decision diamond labeled 'InvCust'. If the condition is TRUE, it leads to an 'IMMEDIATE ACTIONS' box with an 'Add Action' button, which then leads to a 'STOP' node. If FALSE, it leads to another decision diamond labeled '+ Add Criteria'. If this criteria is TRUE, it leads to another 'IMMEDIATE ACTIONS' box with an 'Add Action' button, which then leads to a 'STOP' node. If FALSE, it leads to a 'STOP' node.

The right-hand panel is titled 'Select and Define Action'. It shows the following configuration:

- Action Name: `InvOnCustomObject`
- Apex Class: `SFX-CustomObjectInvoice`
- Set Apex Variables table:

Field *	Type *	Value *
<code>parameterIds</code>	Formula	Build a formula...
- Insert: Field, Function, System Varia..., Operator
- Formula text: `'recordid='+[energy_audit__c].Id+'&mappingid=a0J2w000002MUQ'`

Buttons for 'Save' and 'Cancel' are visible at the bottom of the configuration panel.

16. Multiple Invoices on existing object on selected line items

This section covers Invoice creation with two options

1. To Create New Invoice every time an item is added
2. To update Invoice if already one exists

Option 1

To create multiple invoices on the same object select the option <Everytime Create New Xero Invoice> on the <Xero Custom Object Mapping> object

- For the functionality to execute as required add the <Exclude Lineltem field> in <Xero Xustom Object Mapping> to exclude line items from xero invoice

Note: this field mapping should be always a check box

Option 2

To create single invoice or update the same Invoice select the option <Update if Invoice exists in Xero>

▼ Basic Mapping	
Xero Custom Object Mapping Name	Opportunity Map
Mapping ID	a0A0I0000zGvet
Invoice/Bill Object	Opportunity
Invoice/Bill Line Item Object	OpportunityLineltem
SFX Invoice Lookup Field	Opportunity__c
Lookup Field Lineltem to Invoice	OpportunityId
Invoice Create/Update	Everytime Create New Xero Invoice
▼ Xero Invoice Object Mapping	
Custom Invoice/Bill Number	Invoice Reference Field
Invoice Account Lookup Field	AccountId
Invoice Contact Lookup Field	Contact__c
Invoice Address Mapping	
Invoice Date Field	Xero_Invoice_Date__c
Invoice Due Date Field	CloseDate
Xero Org Unique Id Field	
Tax Exclusive/Inclusive Field	
Invoice / Bill / Credit Note	Invoice
Currency Code Field	
Invoice Status	DRAFT
Xero Branding Theme Field	
▼ Xero Invoice Line Item Object Mapping	
Line Item Item Code Field	Line Item Description Field
Line Item Quantity Field	Quantity
Line Item UnitPrice Field	UnitPrice
Line Item Xero Account Code	Account_Code__c
Line Item Xero Tax Rate	Xero_Tax_Rate__c
Line Item Discount Field	
Exclude Lineltem	truetest__c

NOTE: If the line item invoice flag is left unchecked, this item will be included every time an Invoice is created.

17. Multi-Currency

SFX Advanced/Enterprise version enables Multi Currency from Xero.

You can create invoice using predefined currencies from Xero.

Contact: [Search] Opportunity: [Search]

Invoice Date: [7/17/2019] Due Date: [7/17/2019]

Status: DRAFT Branding: Standard

Invoice Line Item Details

AUD Australian Dollar

Remove	Description	Quantity	Unit Price	Accounts	Discount Rate(%)	Tax Rate
X				(REVENUE) 200-Sales		Tax on Sales
X				(REVENUE) 200-Sales		Tax on Sales
X				(REVENUE) 200-Sales		Tax on Sales

Add Row

Invoices are created based on the Currency selected and the same is updated in Xero.

Currency field can be updated in opportunity object using Process Builder to automate invoice creation.

18. Multi Xero Org

SFX Enterprise version enables Multiple Xero Org Integration.

Setup Multi Xero Org

Connect and authorize your Xero org followed by selecting the required org under multi-org section. (Please refer/follow steps to connect Primary / Default Xero org)

No.	Connected Xero Org	Select/Change Xero Org	Active	Sync	Org Unique Id	Remove
1	TESTORG2	<input type="text" value="-Select-"/> TESTORG2 TESTORG	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	31fcc4f6-828b-aa8f-e390-c87f295dee58	<input type="button" value="X"/>

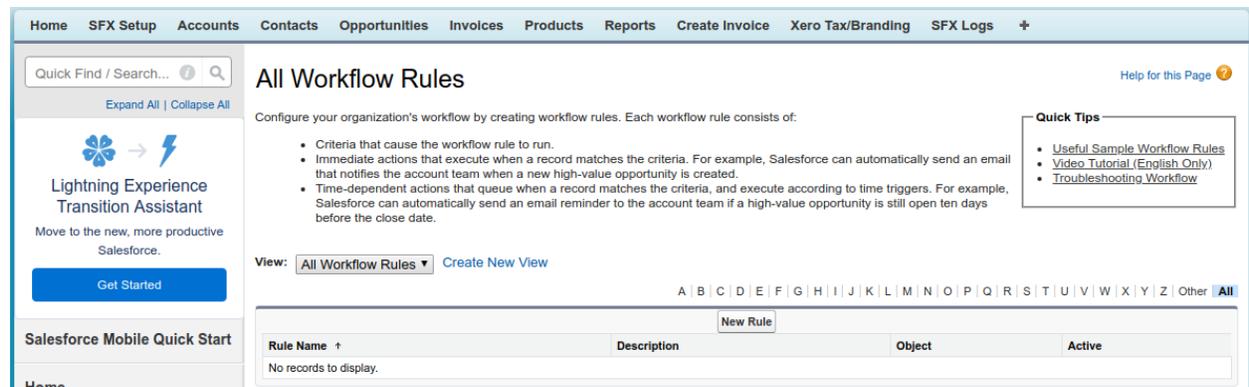
Auto Invoice creation on Multiple Xero Org

Dynamically select Xero Org and create invoice from SFX Auto Invoice using workflow rule and Process builder (refer Section 12 on page 26 for Auto Invoice creation using Process builder)

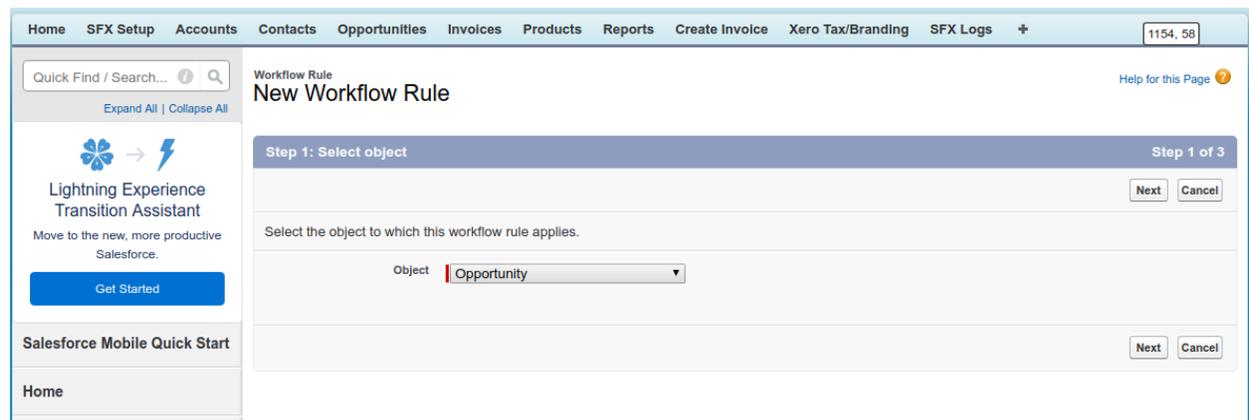
- Click on setup from salesforce menu



- Go to Workflow and Approval Process - > Workflow Rules



- Create a new workflow rule on opportunity object



- Add criteria for Xero org selection

New Workflow Rule
Opportunity

[Help for this Page](#)

Step 2: Configure Workflow Rule
Step 2 of 3

Previous Save & Next Cancel

Enter the name, description, and criteria to trigger your workflow rule. In the next step, associate workflow actions with this workflow rule.

Edit Rule ! = Required Information

Object: Opportunity

Rule Name:

Description:

Evaluation Criteria

Evaluate the rule when a record is:

created
 created, and every time it's edited
 created, and any time it's edited to subsequently meet criteria [i](#)

How do I choose?

Rule Criteria

Run this rule if the :

Field	Operator	Value	
<input type="text" value="Opportunity: Amount"/>	<input type="text" value="greater than"/>	<input type="text" value="5000"/>	AND
<input type="text" value="Opportunity: Stage"/>	<input type="text" value="equals"/>	<input type="text" value="Closed Won"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	

[Add Filter Logic...](#)

Previous Save & Next Cancel

- Add workflow field update action

Edit Rule Auto Xero UniqID Update

[Help for this Page](#)

Step 3: Specify Workflow Actions
Step 3 of 3

Done

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria: (Opportunity: Amount GREATER THAN 5000) AND (Opportunity: Stage EQUALS Closed Won)

Evaluation Criteria: Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

No workflow actions have been added.

Time-Dependent Workflow Actions [See an example](#)

No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

- Update <Xero Org Unique Id> field from opportunity

Edit Field Update

[Help for this Page](#) 

Xero Org Uniq Id Update

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.

Field Update Edit

Identification ! = Required Information

Name

Unique Name 

Description

Object Opportunity

Field to Update

Field Data Type Text

Re-evaluate Workflow Rules after Field Change 

Specify New Field Value

Text Options

A blank value (null)
 Use a formula to set the new value
[Show Formula Editor](#)

Use [formula syntax](#): Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7)

- Copy Org unique id from Xero Multi Org Setup under SFX Setup tab, where you need to create an invoice.

No.	Xero Org Name	Consumer Key	Active	Sync	Org Unique Id	Remove
1	<input type="text" value="RD_Org1"/>	<input type="text" value="*****KLI"/>	<input type="checkbox"/>	<input type="checkbox"/>	b1289ff5-03fa-c38a-b7e2-c137ebbc087d	<input type="button" value="X"/>
2	<input type="text" value="RD_Org2"/>	<input type="text" value="*****ML"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	53101a9f-b35d-48a9-30a7-053a6e24de1e	<input type="button" value="X"/>

- Update copied <Org Unique id> in the new field value enclosed with single quotes (')

Edit Field Update

[Help for this Page](#) 

Xero Org Uniq Id Update

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.

Field Update Edit

Identification ! = Required Information

Name

Unique Name 

Description

Object Opportunity

Field to Update Opportunity: Xero Org Unique Id

Field Data Type Text

Re-evaluate Workflow Rules after Field Change 

Specify New Field Value

Text Options

A blank value (null)

Use a formula to set the new value

[Show Formula Editor](#)

Use [formula syntax](#); Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7)

- Save and activate the workflow rule.

Workflow Rule Help for this Page 

Auto Xero UniqID Update

Workflow Rule Detail [Edit](#) [Delete](#) [Clone](#) [Activate](#)

Rule Name	Auto Xero UniqID Update	Object	Opportunity
Active	<input type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description			
Rule Criteria	(Opportunity: Amount GREATER THAN 5000) AND (Opportunity: Stage EQUALS Closed Won)		
Created By	Nagaveena A , 7/17/2019 3:34 AM	Modified By	Nagaveena A , 7/17/2019 3:47 AM

Workflow Actions [Edit](#)

Immediate Workflow Actions

Type	Description
Field Update	Xero Org Uniq Id Update

Time-Dependent Workflow Actions [See an example](#)

 No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

[Edit](#)

Note: If criteria of workflow rule does not match or field updated as empty then the Invoice is created under Primary / Default Xero Org.

19.Contact Us

THANK YOU!!! for using SFX 1.67

We are here to connect you

For any support issues please contact support@riverdalecloud.com.au