

Xeroom Installation Service – Requirements Checklist

Thank you for purchasing our installation service for Xeroom. We aim to complete the first stage of the work within 2 working days of receipt of this information which is to have it set up on your test server. Once you are happy for this to be migrated to your live system we will aim to do that within 2 working days.

In order for us to complete the work in a timely manner please can you supply us with the following information some of which may require checking with your bookkeeper or accountant:

1. Wordpress admin logins to your test site or live site.
2. Xero site instance login invitation.
3. FTP login with access to the plugins directory.
4. Please answer the following checklist:
 - a. Do you wish to setup Xeroom first on a test installation? This is recommended but not essential.
 - b. What is your preferred Xero account to post your sales to or would you like us to create a new sales account for WooCommerce sales?
 - c. What is your preferred Xero bank account to post your payments to or would you like us to create a new account for WooCommerce payments?
 - d. Do you wish to use inventory synching? If so please read this article to understand the full implications of doing so some aspects of which are irreversible in Xero <http://www.xeroom.com/managing-inventory-xero-woocommerce/> .
 - e. Where do you want the master inventory kept in WooCommerce of Xero?
 - f. Do you want us to handle the bulk download/upload of your inventory codes and descriptions for you from and back into Xero and WooCommerce? This requires considerable work and is offered as an extra service <http://www.xeroom.com/product/bulk-product-sku-code-load-xero-woocommerce/> ? NB: If your SKU codes don't match exactly between WooCommerce and Xero then Xeroom will still work but the products will be created as new ones in Xero using the SKU or Product ID and description from

WooCommerce instead of using the unmatched product that exists in Xero.

- g. Do you have an Inventory Asset Account set up in Xero or would you like us to create one for you?
- h. What is your preferred Xero accounts to post your inventory purchase costs (COGS) into or would you like us to create a new sales account for WooCommerce sales?
- i. Where do you want to take the prices and product descriptions from for the invoices that get created in Xero, WooCommerce or Xero?
- j. Do you want to be able to manually edit/correct/amend any invoices in Xero after they are created? If so this will mean that payments cannot be automatically applied on completion of the checkout process in your shop since in Xero once payments are applied you are very limited in what you can edit on the invoice.
- k. Do you want us to perform an upload of all your historic orders? If so you will need to upgrade your version of Xeroom to the Bulk Data Uploader version here and we will run this for you for free
<http://www.xeroom.com/product/xeroom-upgrade-bdl-bulk-data-load-version/>

Please note that we will run a small number of test orders through both your test and live sites. These will be left in place so that you can check them for yourself. These will then need to be deleted. In Xero any test accounts used will be left in place as will any test orders. Any unpaid invoices will need to be manually deleted and any paid invoices will need to be reversed with credit notes since the entries will already have been posted by Xero to the relevant accounts.

Please check through everything and run your own test orders to ensure everything is working as you expect and want. If there are any questions or issues then we will answer them and once you are happy with the installation then please delete the logins that you provided us with.