



## **Xeroom version 2.2.0 - Installation Notes**

### **Introduction**

Version 2.2.0 is a major release with many bug-fixes and useful extra features. It has taken over 250 manhours of development effort by one of the World's top WooCommerce plugin development firms. This release has 9 major bug fixes, 12 minor ones, various security improvements and 20 new features many based on practical operational feedback from our customers, making Xeroom the best WooCommerce-Xero plugin available by far.

### **Upgrade from Version 2.1.0**

1. Deactivate your existing version of Xeroom and delete it. Any settings will be retained in the database.
2. Download the zipped Version 2.2.0 from the download link onto your local pc.
3. In Plugins/Add New/Upload Plugin upload the zip file, install and activate.

### **Upgrade from Version 2.0.8 and older**

These versions use Oauth1a which is now a deprecated and about to be expired connection to Xero. A new Xero app and connection will need to be created – detailed instructions are given here [www.xeroom.com/installation-instructions/](http://www.xeroom.com/installation-instructions/).

IonCube encoder that was used to encode/decode is no longer used.

## New Features & Enhancements

### Improved Layout and New Sleek Logo

**Xeroom**  
Version 2.2.0

**Xeroom License Key**

Status: **Xeroom Active**

Xeroom License Key: 5fd714dea9cbf

Submit

**Xero Settings**

Xero Client ID: 0AD893BB7C484B8DA7329C1EBD3068DC

Xero Client Secret: rFX954uq-nM7PtkLobYuR9DmqVQ7-F7A0ZRrtAvzIRGUxYF

Xero Authorize

Xero Connection Status: **Active**

General | Taxes | Global Inventory Sync

Submit

Invoice Prefix: [field]

Invoice Start No: 20

Invoice Reference Prefix: WOO

Sales Account: 205

Shipping Revenues Account: 210

**Map Payment Methods to Bank Accounts**

Default Payment Gateway Account: 110  Send payment automatically

Enter Xero account for Direct bank transfer: 110  Send payment automatically

### Licence Validation Check and 7-Day Grace Period

bookmarks | Henry's site | taxonly | PAL water clean | xeroom | stevan | trading 2017 | unilalia 2017 | seo 2017 | Devon move | karolinaste

3 | 0 | + New | UpdraftPlus

**Add Plugins** | Upload Plugin

Xeroom: Your licence cannot validate. It has either expired or cannot reach our server. Xeroom will stop working in 6 days. Please renew or contact us if this message remains after 2 days.

Featured | Popular | Recommended | Favorites

Plugins extend and expand the functionality of WordPress. You may automatically install plugins from the [WordPress Plugin Directory](#) or upload a plugin in .zip format by clicking the button at the top of this screen.

**Classic Editor**  
Enables the previous "classic" editor and the old-style Edit Post screen with TinyMCE, Meta Boxes, etc. Supports all plugins that extend this editor.  
By WordPress Contributors  
★★★★★ (917) | Last Updated: 4 weeks ago | 5+ Million Active Installations | Compatible with your version of WordPress

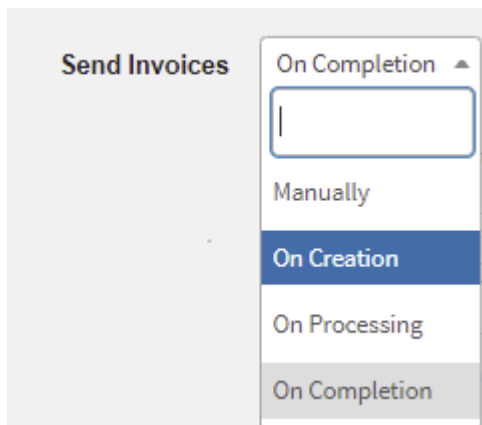
**Akismet Spam Protection**  
The best anti-spam protection to block spam comments and spam in a contact form. The most trusted antispam solution for WordPress and WooCommerce.  
By Automattic  
★★★★★ (911) | Last Updated: 4 weeks ago | 5+ Million Active Installations | Compatible with your version of WordPress

Xeroom now does a licence check only once/day instead of on each order. This reduces processing load/failures on checkout and also deals with the situation where server issues or comms between your server and ours prevent authentication of the licence leading to failed postings.

If authentication now fails for any reason or if your licence has expired then it gives a 7-day grace period before it stops working. If the reason is a temporary comms or server issue then the next day it will authenticate and reset the timer. If it does not then the countdown continues with a message. If it has not reset after a few days then you need to check to see if your licence needs to be renewed. If not then please contact our support desk so we can verify it.

### **Invoice Send Trigger on Processing – For Payment on Account Process**

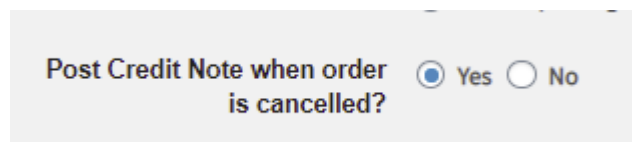
Previously the triggers for Xeroom to post the invoice were manually or either when the order was created or when the process status changed to Completed. We have now added “On Processing” to the triggers.



Processing status in WooCommerce generally means payment has been received and stock has been reduced and the order is awaiting fulfillment. Some customers need to be able to post the order to Xero automatically not just when the order is created but once the goods have been sent out which will be before payment and before completion. This happens typically when a customer is paying on account, he pays all of his orders for the month at the end of the month in one payment having previously received invoices for each order. Once payment is received then all the orders can be marked as Completed in a batch in WooCommerce.

### **Cancelled Orders – No Credit Note Generated and Inventory Reversed**

In WooCommerce a Cancelled order status is triggered when the admin or customer cancels an order of Failed status or where the payment via the payment gateway has failed or is over the set time limit which is usually a few hours. Since no payment has been sent to Xero no credit note is created and the stock movement on order creation is reversed, ie increased. Xeroom now follows this logic.



## Automatic Credit Note Generation on Refunded Orders

Sales > Invoices >  
Credit Note CN-9361

Awaiting Payment View online invoice Email Print PDF Credit Note Options

To	Date	Credit Note #	Reference	Branding Theme	Total
The Henley Fan Company Ltd 22 Harrison Close Twyford RG10 0LL UNITED KINGDOM (UK) <a href="#">Edit address</a>	7 Jan 2021	CN-9361	263	Standard Invoice	12.00

Amounts are Tax Exclusive

Item Code	Description	Quantity	Unit Price	Account	Tax Rate	Amount GBP
TESTSP	Test Product A	1.00	10.00	Xeroom Sales	GEVAT	10.00
Subtotal						10.00
Total VAT 20%						2.00
<b>Total Credit</b>						<b>12.00</b>

Previously only Cancelled orders would automatically generate a credit note in Xero. Now Refunded orders will generate a credit note whether in full or partially.

Refunded orders – these are ones that have been Completed in WooCommerce (ie paid for or on account and shipped) and also payment has been sent to Xero (and internally posted in the ledgers so are no longer easily deletable) and hence require a credit note to be applied to reverse them.

Exception - If the order is for “payment on account” in which case payment is not normally made until the end-of-the-month in Xero manually, so any refunds for invoices of Approved status in Xero do not need a credit note but should be voided. Since they are usually – but not always – due to returns then the stock is increased.

Partial refunds – These are also now handled with a credit note automatically generated for the amount.

### Add Purchase Order Numbers to the Woo Order and Xero Reference

For customisations WooCommerce offers a neat hook called filters which are ignored if not used. We have added this one, kindly provided by one of our customers, to enable PO numbers to be captured and added to orders. It requires some additional work to implement such as a field to be added on the checkout form. Send us a ticket for full details.

The data is entered by the customer at the checkout with customer fields:

Invoice to

Send invoice to email on account

**Accounts Payable Email \***

School PO (optional)

Ship to name

First name \* Last name \*

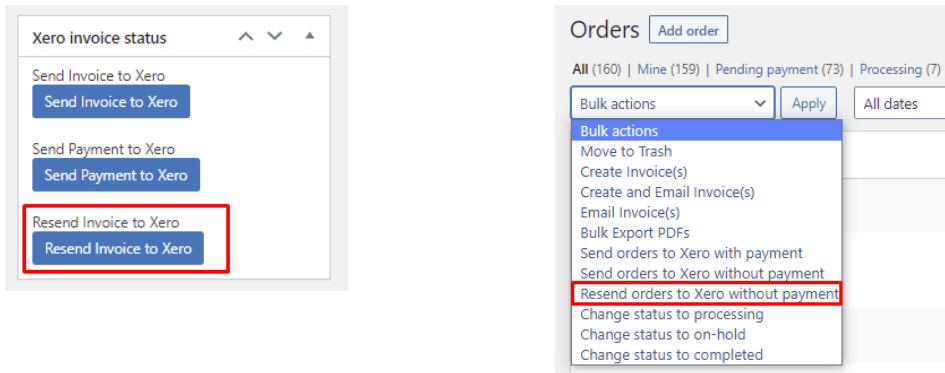
### Send Additional Email on Order to Accounts Payable

We have added another filter that means a split of role where the person placing the order (the “Billing” person) is not the one to pay for it. So, the Xero invoice is sent instead to the accounts payable dept of the company or organisation of your customer. Send us a ticket for full details.

## Repost Failed Orders with Alphabetic Suffixes

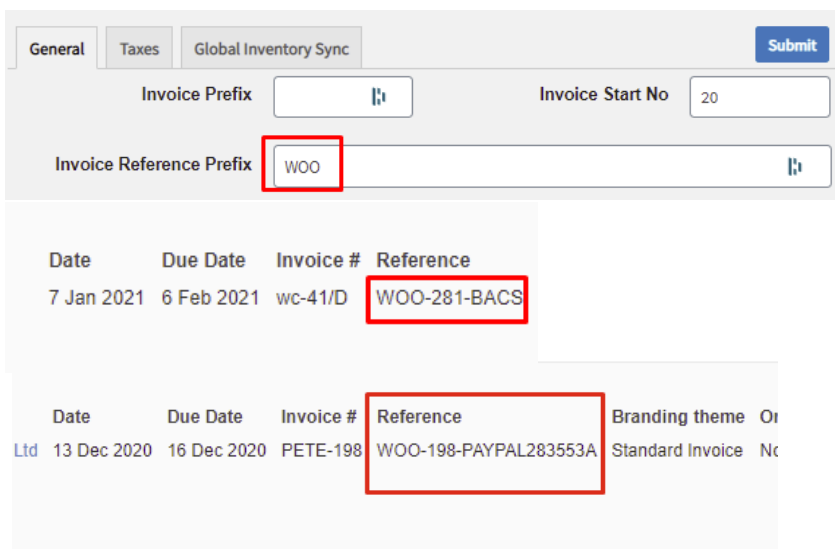
Xeroom uses a flag that gets set once an invoice is posted to prevent it from being posted twice. Sometimes on checkout (which is the most complex part as many processes are taking place across 3 platforms) this flag can get set despite the order not having been posted. We have added a new button on the order screen and new option in the in the Bulk Action dropdown list on the WooCommerce order manager screen to resend an order.

To enable easy spotting of any resent orders that are not needed these resends are given invoice numbers with alphabetic suffixes. In operation, the unwanted invoices can be quickly found and deleted.



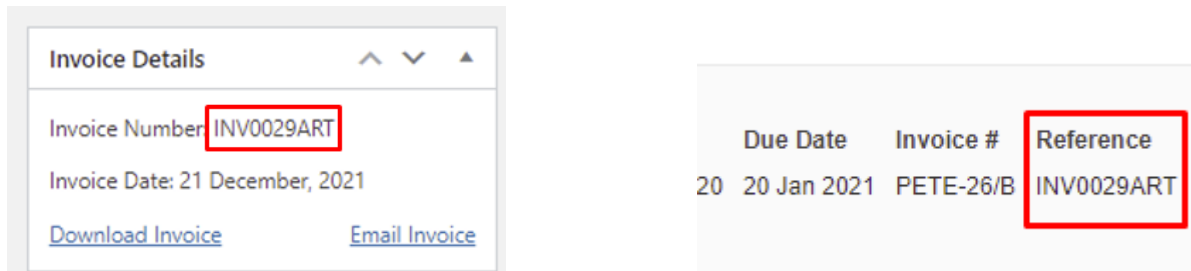
Number	Ref	To
wc-41/D	WOO-281-BACS	bbbbb
wc-41/C	WOO-281-BACS	bbbbb
wc-41/B	WOO-281-BACS	bbbbb
wc-41/A	WOO-281-BACS	bbbbb
wc-41	WOO-281-BACS	bbbbb

## Xero Reference – Custom Prefix & Gateway Payment Reference



You can now add a 4 digit custom prefix to the Xero reference which is made-up of the order number concatenated with the payment gateway used. In the case of a card payment or PayPal then the last 10 characters of the transaction are added. This enables actual payments to be easily identified and matched when doing reconciliations with the live bank feeds into Xero.

### Integration with Woocommerce PDF Invoices Plugin



Many customers use this plugin to generate pretty invoices with lots of flexibility from WooCommerce. Xeroom will now use this invoice number as the reference in Xero so they all tie-up.

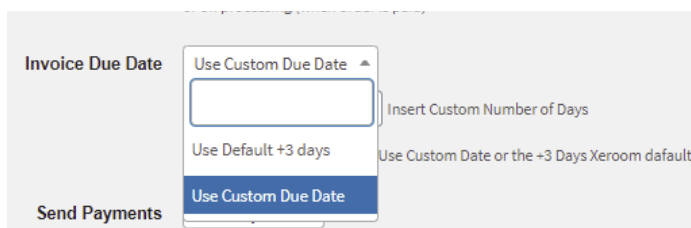
### Stop Automatic Purchase Bills in Xero

Each time inventory is reduced by an order Xero was automatically generating a bill for the same amount to top-up the inventory, which was messy and confusing. This has now been prevented so that any additions needed to inventory must now be explicitly and manually made.

### Payments – into Xero Asset or Liability accounts

Previously we had to use dummy bank accounts in Xero to accept payments as the clearing account which is not clean. It is now possible to use asset or liability accounts to accept payments which is what most bookkeepers typically. The multicurrency version of Xero remains limited and dummy bank accounts must be used with that.

### Custom Due date Setting



There was an issue with Xero not picking up the set Due Date on invoices. We have managed to overcome this so that the default of 3 days can be used or any other date up to 30 days. This is essential for B2B customers who use “payment-on-account”.

## Payment Gateway Automatic Send Control

Map Payment Methods to Bank Accounts

Default Payment Gateway Account	<input type="text" value="100"/>	<input type="checkbox"/> Send payment automatically
Enter Xero account for Direct bank transfer	<input type="text" value="100"/>	<input type="checkbox"/> Send payment automatically
Enter Xero account for Check payments	<input type="text" value="100"/>	<input type="checkbox"/> Send payment automatically
Enter Xero account for Cash on delivery	<input type="text" value="100"/>	<input type="checkbox"/> Send payment automatically
Enter Xero account for PayPal	<input type="text" value="110"/>	<input checked="" type="checkbox"/> Send payment automatically
Enter Xero account for Invoice Payment	<input type="text" value="120"/>	<input type="checkbox"/> Send payment automatically
Enter Xero account for Credit Card (Stripe)	<input type="text" value="130"/>	<input checked="" type="checkbox"/> Send payment automatically

This gives granularity of control to the automatic sending of payments by gateway. If you use instant payment gateways like credit card or PayPal then you want the payments automatically sent.

**Payment-on-account customers** – Many B2B users use POA which means no payment is sent from WooCommerce as they do not pay until the end-of-the-month or later when they are all paid in one go. Ticking the relevant boxes enables this mix of automatic and not payment sends to be handled.

The **WooCommerce Invoice Gateway** plugin works great for this (rather than the standard default COD or bank transfer payment methods) and gives additional flexibility and options for the order status post checkout. It can also be used with the **Wholesale Prices** plugin to only show this gateway to B2B customers and not retail ones.

### Full Product Details Posted Saved in Xero

When WooCommerce is Price Master and a product is on an order but doesn't exist in Xero then it gets created in Xero. Before it only saved the SKU and description only but now we have added all the other details which get saved, ie price, COGS and sales accounts, tax rates for both Purchases and Sales.

#### Test Product A

TESTSP

##### Inventory Item

Inventory Asset Account	617 - xeroom test account
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##### Purchases

Unit Price	0.00
Cost of Goods Sold Account	310 - Costs of goods sold
Tax Rate	20% (VAT on Expenses)
Description	Test Product A

##### Sales

Unit Price	20.00
Account	205 - Xeroom Sales
Tax Rate	Zero Rated Income
Description	Test Product A

## Name and Address Mapping to Xero

### Xero address mapping

**Xero Contact Name**  First/Last Name  Company Name  Email address

**Xero Address**  Use WooCommerce User Address  Use Xero User Address

### Contact Information

Contact Name

[Add account number](#)

Primary Person

Email

[Add another person](#)

The contact name mapped in Xero can now be the order first and last name, company name or email address. If it is a company then the company name will be taken from the order and made the first line of the address since Xero doesn't have a company name field.

There is also a choice of whether to use the existing address in Xero or to use the WooCommerce one (which will update the Xero one).

## Batch Processing Rate Control

**Number of orders sent on bulk request**

### Orders [Add order](#)

1 order remaining to be sent to Xero.

All (95) | Mine (94) | Pending payment (42) | Processing (6) | On hold (30) | Completed (14) | Cancelled (3)

Bulk actions  All dates

<input type="checkbox"/>	Order	Date
<input type="checkbox"/>	#181 Peter Lloyd	Nov 11, 2020
<input type="checkbox"/>	#179 Peter Lloyd	Nov 11, 2020



When batches of orders are selected to be sent to Xero a cron job is created. Previously the cron job was not showing a completion message and the progress message was not clearing sometimes which has been fixed. The cron job was sometimes running very slow appearing to hang. Since Xero has limitations on the rate and number of calls resulting in failed postings if breached, we have had to throttle it down. We have added a setting for the throttle so the batch rate/min can now be set along with a running countdown of the progress.

**Cron Jobs** - If you are experiencing big delays or any hanging check that cron jobs are running properly on your server. There are various plugins that will show this. Cron jobs may have been set by your web designer to run on a 5-15min schedule in cpanel which will mean there will be delays before a batch process can run. Also, too frequent a schedule eg every minute, can lead to multiple cron jobs running and overloading your allocated memory on your server resulting in hanging until they time out.

### **Main Bug Fixes**

1. Canadian customer tax error.
2. Deprecated Coupon Code and UnitPrice error.
3. Variable product with 3 or more variations not being posted.
4. Batch loading success message missing.
5. OAuthSignatureMethod\_HMAC\_SHA1 class already in use.
6. Credit notes on cancelled orders charging GST twice.
7. Guzzle http undefined function and other "class-in-use" conflict errors with other plugins fixed.
8. Xero connection status not updating when connection broken.
9. Rest API route definition callback permissions error.

### **Issues & Next Release**

If you find any of these features are not working please send an email to our helpdesk [support@xeroom.com](mailto:support@xeroom.com) which will open a ticket. Whilst we have done dozens of hours of testing on all these features, we know that sometimes bugs still creep through undetected. With this in mind we plan to do a further update in approximately 6 weeks time with fixes for anything that arises.