

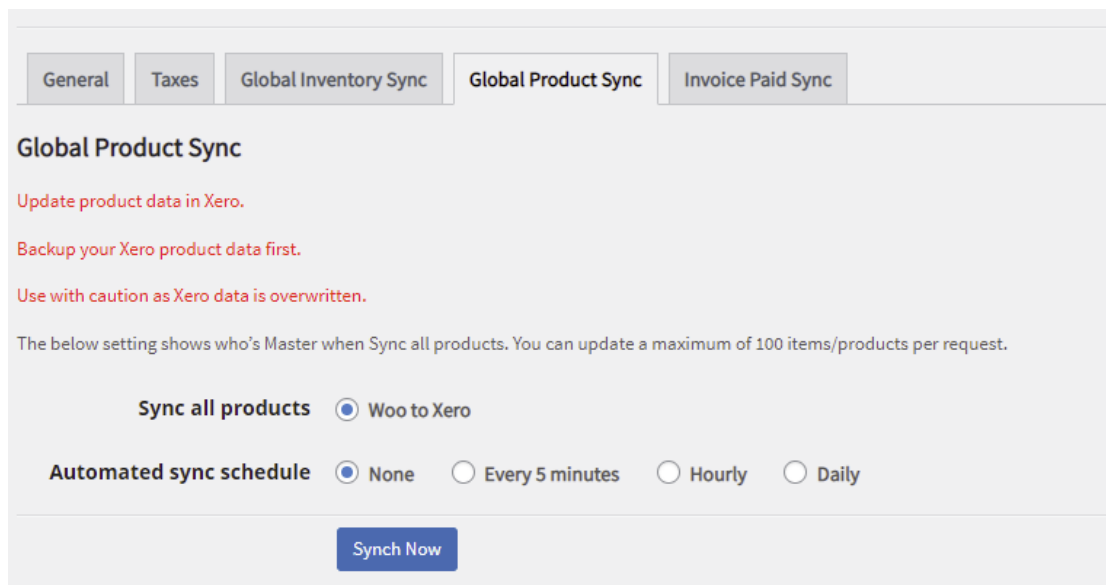
Xeroom 2.3.2 - Release Notes

Release date: 28th November, 2021

Xeroom Enhancements

1. **Global Product Synch** – Previously any new products would get created in Xero only when they got ordered. This feature will update or replace all products in Xero on demand or on a daily schedule. This will make initial setup quicker and ongoing maintenance easier. NB: Xero will only permit this to be done with tracked products which once set to be tracked cannot be untracked.

Beware: Your Xero product data will be overwritten by this process and Xero doesn't provide any backup and restore facility. Furthermore, tracked products in Xero can't be deleted they can only be renamed. Always test this first on a Xero demo account and export all your Xero product data on live to a CSV file in case it needs to be restored. If you don't know what you doing then do not use!




The screenshot shows a settings panel for 'Global Product Sync'. At the top, there are five tabs: 'General', 'Taxes', 'Global Inventory Sync', 'Global Product Sync' (which is active), and 'Invoice Paid Sync'. Below the tabs, the title 'Global Product Sync' is followed by three red warning messages: 'Update product data in Xero.', 'Backup your Xero product data first.', and 'Use with caution as Xero data is overwritten.'. A paragraph explains that the setting below shows who's Master when Sync all products, with a note that a maximum of 100 items/products per request can be updated. There are two sections of radio buttons: 'Sync all products' with 'Woo to Xero' selected, and 'Automated sync schedule' with 'None' selected. At the bottom, there is a blue 'Synch Now' button.

2. **Send Xero invoices from WooCommerce** –Xero can now automatically email your customers from Xero with a link to their invoice. This will trigger with each new order or a batch can be selected and sent from the WC order dashboard. Now you no longer need to create any invoices in WC as they can be kept all together in Xero where they should be. Note: The Xero email cannot send the invoice as a pdf attachment so if you wish to do this continue to use a WC PDF invoice plugin – most of which work with Xeroom.

Send invoices

Send invoices to customer from Xero Send unpaid invoices automatically Send paid invoices automatically Do not send

3. **Order Notes** – Notes provided by the customer at the check-out are now posted to the face of the Xero invoice as a line item.

 **Shipping**

Sydney Potterstone
 New Super Co
 19 Chattererton Road
 London
 N19 4NQ

Customer provided note:
 This is a special note about my order.

Item Code	Description	Quantity	Unit Price	Disc %	Account	Tax Rate	Proj
NEWP1	New Product 1	1.00	83.33		Account code test rev	20% (VAT on Income)	
SHIP123	Artemis Shipping Charge	1.00	0.50		New Woocommerce orders	20% (VAT on Income)	
NOTE	This is a special note about my order.	1.00	0.00	0.00			

4. **Xero Tracking Categories Use** – WC Products can be assigned tracking labels (tags) that have been created in Xero enabling the full use of Xero tracking for sales analysis and reporting by product groups, branches, depts, cost centres, geographies etc. For further info on tracking in Xero go to <https://central.xero.com/s/article/Set-up-tracking-categories-UK>. We recommend doing a bulk load using a spreadsheet for these tags. When setup they will appear on the invoice face and can be used for reporting purposes. This can be used with or as an alternative to product category sales accounts in Xero avoiding lots of additional sales accounts.

To set them up:

1. First create your TC's in Xero and populate them with the values you wish to use. You can use up to 2.
2. Add these to the Xero setting separated by a comma and submit/save.
3. Your TC's will then appear in the product settings and will be attached and show on the invoices when that product is posted in an order to Xero.

Send payments manually when order is completed. This may need to be carried on if you

Tracking Category

Insert Xero Tracking Category Name

Product data — | Virtual: Downloadable:

- General
- Inventory
- Shipping
- Linked Products
- Attributes
- Advanced
- Product Add-Ons
- Xero Tracking Category**
- Get more options

Projects:

Brands:

- Select Category
- Apple
- Cubot**
- Samsung

Sales overview > Invoices > **Invoice 3003**

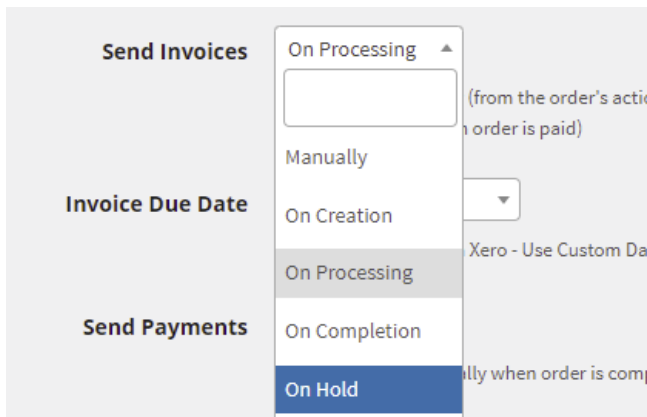
Awaiting Payment Preview Email Print PDF Invoice Options

To	Date	Due Date	Invoice #	Reference	Branding theme	Online Payments	Total
Tim Lloyd The Hanley Fan Company Ltd 22 Harrison Close Twyford RG10 0LL UNITED KINGDOM (UK) Edit address	7 Oct 2021	10 Oct 2021	3003	WC-746-STRIFE-lzIKMZR	Standard Invoice	None. Get set up now	10.60

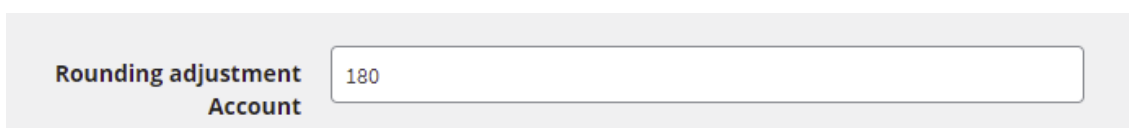
Amounts are Tax Exclusive

Item Code	Description	Quantity	Unit Price	Disc %	Account	Tax Rate	Projects	Brands	Amount GBP
NEWP10	New Product 10	1.00	8.33		Account code test rev	20% (VAT on Income)	Large project	Apple	8.33
SHIP123	Artemis Shipping Charge	1.00	0.50		New Woocommerce orders	20% (VAT on Income)			0.50
Subtotal									8.83
Total VAT 20%									1.77
TOTAL									10.60

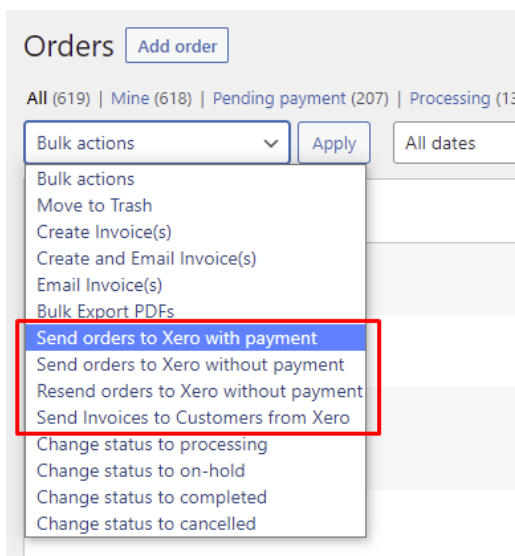
- Xero Address No Contact in Xero** – If using existing Xero addresses to map orders to their accounts and the address is blank then it will use the WooCommerce one as a fall-back to avoid the posting failing.
- Xero Address Using Company as Contact** – If the company field is blank in WooCommerce then the contact name will be used as a fall-back to avoid the posting failing.
- Send invoices trigger “On hold” added** – Some POA customers wish to show orders as “on hold” until they are paid at the end-of-the-month but want to send orders now. This is now possible as well as the other triggers.



- 8. Rounding Adjustment Account** – This is the Xero account to which any rounding adjustments are posted to which is now user-selectable.



- 9. Bulk Send Process Improvement** – Whenever you select multiple orders to send in bulk it fires off a cron job. This process has been optimised for call rate into XeroAPI and to restart every 5 mins if it gets stopped for any reason.

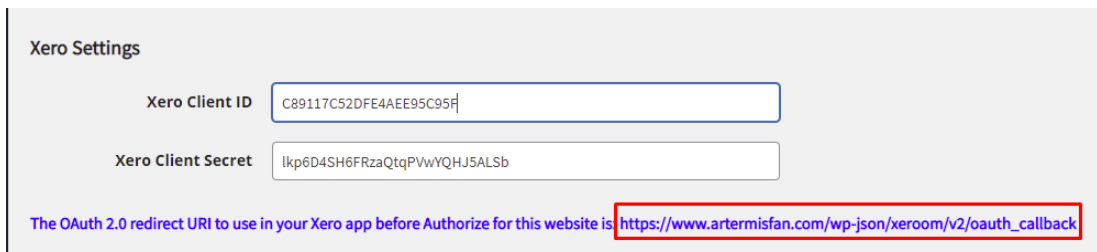


- 10. Sales Sub-Categories Posting** – This will enable sub-categories' descendants to be picked up and posted to the correct Xero sales sub-account corresponding to the first level of category. Eg An order for say product latte in the category Drinks/hot/coffee/ will be posted to drinks in Xero without the user having to fill in the hierarchy flags of Drinks and hot.

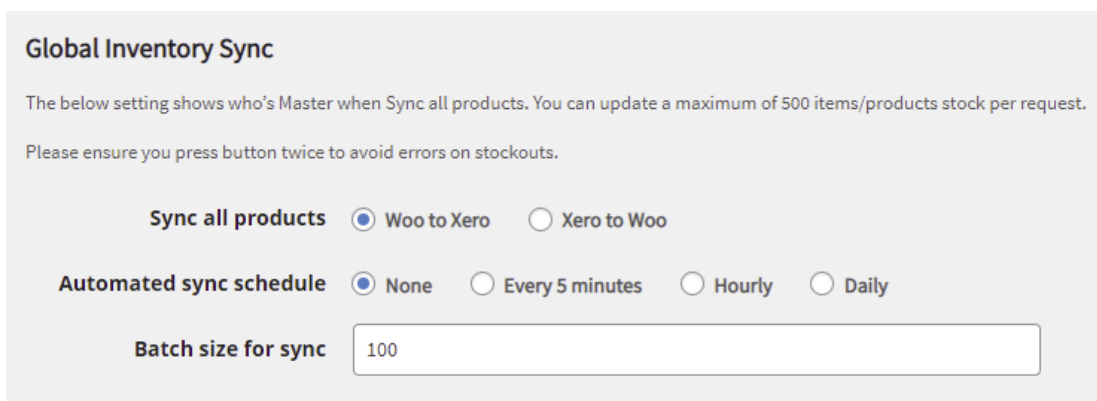
- 11. Excel Library** – Version has been updated for download files compatible with php7.3 and above as the previous version was deprecated and causing errors in the saved

XLS log files.

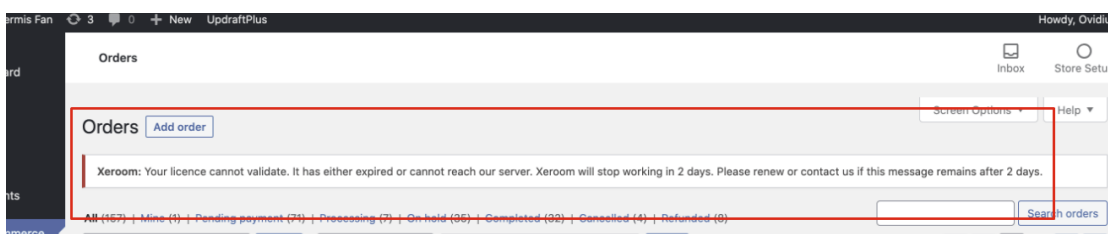
- Xero Connection URI** – The exact Xero URI needed for your connection is generated and displayed for your website. This URI is crucial for the Xero endpoint to work and is affected by your permalinks and other settings. Xeroom will now generate the exact one you need eliminating installation connection errors.



- Inventory Synch Schedule** – Synch every 5 minutes option added to give near real-time synch. The batch size is the chunk size for data handling to avoid Xero API call limits – use 500 or if getting errors reduce to 100.



- Hyphens in Xero Bank Accounts** – This is a special character which gets rejected by Xero and can now be used.
- Licence Expiry Alert** - A warning message displayed in WC order dashboard if expired and 7 days grace period countdown.



- Xero Connection Reliability** – The Xero token is refreshed every 15 mins to prevent drops from happening due to expiry or being taken by other apps.

17. **WooCommerce Subscriptions Plugin** – Compatability and errors using discounts/coupons fixed when using this. Redemption points SKU codes fixed.
18. **Debug Screen Error Messages** – The log is now extended to show multiple pages. This facility is useful as it feeds back any internal errors sent from Xero about your order posting or failing.
19. **WooCommerce Sequential Order Numbers** – Compatability added so Xeroom will pick up the order number allocated by this plugin and use it for the invoice no. Add this meta key from your WP_metaposts table to the Custom Invoice no setting in Xeroom, “post invoice_number_formatted”. If it doesn’t work then check that this meta key is correct by looking at your database table. Do not add any Invoice Prefix or Invoice Start No in Xeroom as they will be ignored in this case. Instead use the settings in the WCSOON plugin.

The screenshot shows the Xeroom settings interface with the 'General' tab selected. There are four tabs: 'General', 'Taxes', 'Global Inventory Sync', and 'Global Product Sync'. The 'Invoice Prefix' field is empty. The 'Invoice Start No' field contains the text 'eg 1000'. The 'Custom Meta Invoice No.' field contains the text 'invoice_number_formatted'.

20. **WooCommerce PDF Plugin Invoice Numbers** - This field can also be used to set any PDF Invoice Number plugin to be used in Xero. Simply go to the WP_Postmeta table, look at a recent order and find the actual number you want posting, then look at the meta key setting for this and cut and paste it into Xeroom. Typical values for the most popular plugins are as follows:

- Woocommerce PDF Invoices by Andrew Benbow
_invoice_number_display
- Invoices for Woocommerce by Bas Elbers
_bewpi_invoice_number
- WooCommerce Sequential Order Numbers Pro by SkyVerge
_order_number_formatted
- WooCommerce PDF Invoices & Packing Slips by Erwout Fernhout
_wcpdf_invoice_number
- WooCommerce PDF Invoices, Packing Slips, Delivery Notes and Shipping Lables by WebToffee - TBA

Xeroom Bug Fixes

We have spent over a hundred hours of system and beta testing for this release and fixed over 30 bugs including fixes for errors coming from or changes in Xero's API. This means Xeroom is more stable and accurate than ever before. The main bug fixes are listed below for reference:

1. **InvalidState** - Connection error
2. **Payment Gateways** – Some prepayments were not showing and others were conflicting.
3. **Licence key not saving & authenticating** – On some new installations.
4. **Refund when invoice contained a rounding error** – The rounding error was getting missed off from the refund which is now fixed.
5. **GST** - With coupons calculation now being done after coupon deduction instead of before.
6. **Coupon errors** – All coupon options ie fixed, percent, cart and manually applied discounts have been retested with different product tax rates and shipping, and any bugs fixed. 100% discount errors also fixed.
7. **Tax Adjustment & Rounding errors** – When incorrect tax mappings were set the difference was posted as a rounding error and not a tax adjustment.
8. **Licence validation failing** – We have whitelisted the validation query for our firewalls and server caching processes that was causing a block to be returned in some instances.
9. **PHP Errors** – Various fixes for address errors. NB: PHP 8 compatibility not added yet.
10. **Invoice Numbering** – All options on the invoice number have been retested and any errors fixed. The conflicts with the Xero sequential number generator have been fixed. Note that the default Xero invoice prefix is "INV-" which can be changed along with the Next Number in Xero/Settings/Invoices/Default. Only use the Xeroom settings IF you want invoices that originate in WC to be numbered differently to your main sequence in Xero.

Default Settings
×

Payment Terms

These terms will be used to set the default Due Dates on all bills and sales invoices. You can always override these terms when you create bills and sales invoices. You can also set custom payment terms for individual contacts.

Bills Default Due Date (Optional)
 Due of the following month ▼

Sales Invoices Default Due Date (Optional)
 Due day(s) after the invoice date ▼

Automatic Sequencing

Define the number to be used when creating your next invoice, credit note or purchase order. The number will automatically increment with each new document you create.

Invoice Prefix	Next Number
<input type="text" value="INV-"/>	<input type="text" value="0511"/>

Credit Note Prefix

The Xeroom settings are:

General
Taxes
Global Inventory Sync
Global Product Sync

Invoice Prefix

Custom Meta Invoice No.

Invoice Reference Prefix

Invoice Start No

11. **Special characters** – All name, address, product and note data is adapted to handle special characters.
12. **Xero Error** - Array () Error
13. **Xero Error** – Invalid state error on connection
14. **Xero Error** - Invoice is not of a valid status for modification
15. **Invoices not appearing in Xero** - Despite stating success in Xeroom.

Delayed Features

1. **Show Invoices as Paid in WC when paid in Xero** – This is useful for those operating payments on account (POA) orders that are settled monthly. Once reconciled in Xero all the order payments will backflush to WooCommerce to show as paid – We have delayed this as it has not passed testing. We are working with Xero support to complete this and aim to release it in the next month.