

Xeroom 2.4.0 - Release Notes

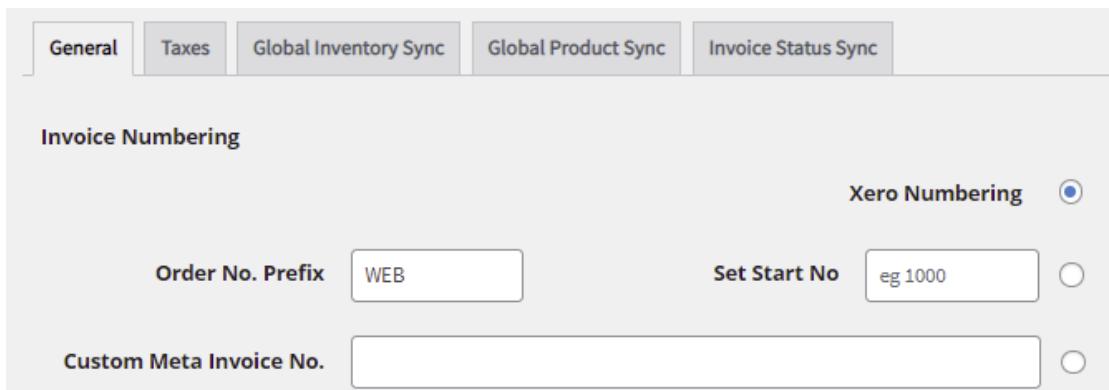
Release date: 30th March, 2022

Xeroom Enhancements

1. Show Invoices as Paid in WC when paid in Xero

When an invoice is paid off in Xero this will trigger Xeroom to update the order status in WooCommerce to show the order Xero status as “Paid in Xero” in blue and also change the order status to “Completed”. This is very useful for companies who have B2B customers that pay on account for all invoices in one go at the end of the month. See Appendix 1 – For more details and setup instructions.

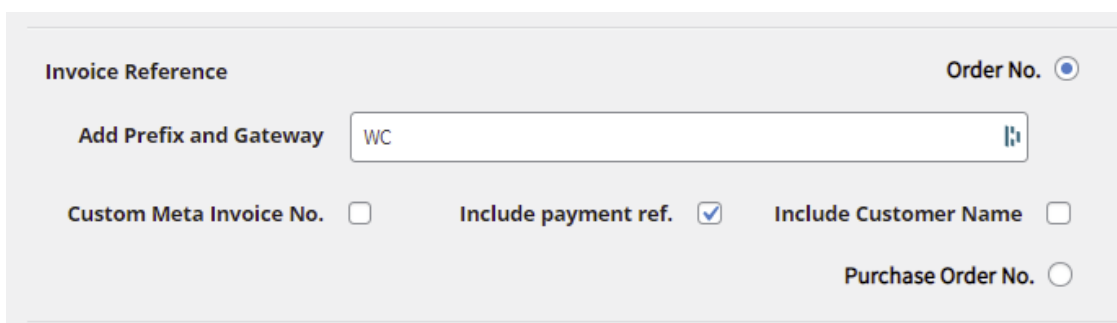
2. Xero Invoice Numbering Options



The screenshot shows the 'Invoice Status Sync' tab in the Xeroom settings. Under the 'Invoice Numbering' section, there are three options for generating invoice numbers in Xero: 'Xero Numbering' (selected with a radio button), 'Set Start No' (with a text input field containing 'eg 1000'), and 'Custom Meta Invoice No.' (with an empty text input field). The 'Order No. Prefix' is set to 'WEB'.

We have simplified and improved the user selections for setting the invoice number that is created in Xero. The WC order no can be used with or without a prefix and for any special invoice no from say the WC Sequential Invoice No plug or any of the WC PDF Invoice plugins can be hooked in with the database field name which is taken from the metapost table e.g., `_order_number_formatted`, `_invoice_number_display` etc

3. Xero Invoice Reference Options



The screenshot shows the 'Invoice Reference' section in the Xeroom settings. The 'Order No.' option is selected with a radio button. Below it, there is a text input field for 'Add Prefix and Gateway' containing 'WC'. There are three checkboxes: 'Custom Meta Invoice No.' (unchecked), 'Include payment ref.' (checked), and 'Include Customer Name' (unchecked). At the bottom, there is a radio button for 'Purchase Order No.' which is unselected.

This has been extended to offer options to use the Customer Name, Purchase Order No which is captured using this free plugin "Purchase Orders fo WC" for which we have added support for. Also, any Custom Invoice No may be used. These options are all in addition to using existing options of: prefix, payment gateway type and payment reference e.g., WC-1078-STRIFE-VnLMXJ. Many people use the reference in Xero to assist in the reconciliations.

Purchase Orders for WooCommerce Settings Deactivate Troubleshoot	Adds a Purchase Order payment method to WooCommerce. Version 1.8 By McGregor Media Web Design View details
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4. Add Delivery Address to Invoice

Xero doesn't permit us to customise the invoice with new fields so we have been constrained here but have added the delivery address when different to the invoice as a line item since at least it posts it over from WC.

Send Invoice Delivery Address Send Don't Send

Sales overview > Invoices >
Invoice 1078

Awaiting Payment
[Preview](#) [Email](#) [Print PDF](#) [Invoice Options](#)

To	Date	Due Date	Invoice #	Reference	Branding theme	Online Payments	Total
Peterö Lloydö The Henley Fan Company Ltd 22 Harrison Close Paris 75000 FRANCE Edit address	19 Jan 2022	22 Jan 2022	1078	WC-1078-STRIFE-VnLMXJ	Standard Invoice	None. Get set up now	37.00

Amounts are Tax Exclusive

Item Code	Description	Quantity	Unit Price	Disc %	Account	Tax Rate	Projects	Brands	Amount GBP
zg-starcross-16-12x12	Best Tile Product ö, ä, ü	1.00	9.60		Xeroom Sales	VAT for France			9.60
SHIP123	Standard Shipping Charge	1.00	20.00		New Woocommerce orders	VAT for France			20.00
NOTE	There is a different shipping address	1.00	0.00	0.00					0.00
SHIPPING ADDRESS	Test Co, Peterö Lloydö, 56 Rue de Rivoli, 75000 PARIS, France	1.00	0.00	0.00					0.00
Subtotal									29.60
Total VAT 25%									7.40
TOTAL									37.00

5. Address Mapping

County is now carried across and the mapped phone no goes to phone field instead of mobile in the Xero Contact.

Xeroom Bug Fixes

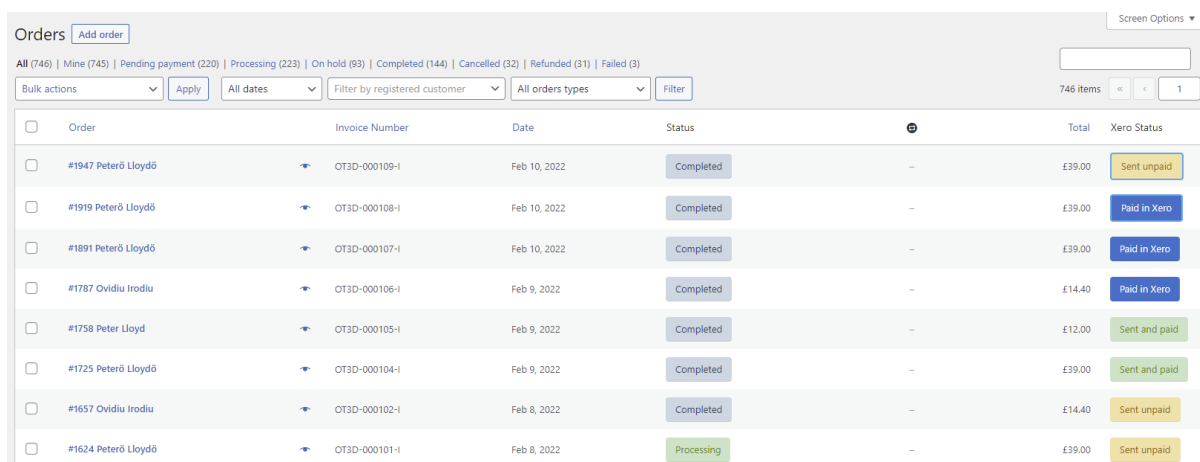
1. **Important Guzzle library update** - only versions of php >7.1 are now supported. This fixes a number of critical errors that were occurring on activation and Xero connection authorisation.
2. **Important Xero library update** – This was also causing a number of Xero connection errors on authorisation and also when sending payments to Xero generating a “0” error.
3. **Xero tax adjustment** - Errors with fixed cart coupon due to the tax handling have been fixed.
4. **Refunds & Credit Notes** - A refund made in WC showed a misc adjustment on the credit note in Xero has now been removed.
5. **Paypal** - Fix for gateway cancellation return to Cart.
6. **Company Name Mapping** – Fallback to use First Name Last Name if blank.
7. **Broken connection button** – Updating when connection down.
8. **Shipping tax** – Fix for wildcard countries in WC not following product tax rates.
9. **Undefined property php error** - In bulk send fixed.
10. **Xero connection status** - Broken error message from Xero translated to be meaningful.
11. **WC Sequential Number plugin** - Invoice reference fix.
12. **Xero connection authorisation** - Fixed undefined function error.
13. **Inventory synch** - Fix undefined index error in WC to Xero.
14. **Inventory synch** - Fix for when inventory reaches zero.
15. **Send on Completion** – Fix for invoice and payment send on completion.
16. **Illegal String Offsets in Tax Rates** - Fix for error on send invoice.
17. **Upgrade process** – Fixed and licence check added.

Appendix 1 – Xeroom Payment Synch from Xero to WooCommerce

Setup Instructions

How it works

When an invoice is paid off in Xero this will trigger Xeroom to update the order status in WooCommerce to show the order Xero status as “Paid in Xero” in blue and also change the order status to “Completed”. It takes around 2 mins for the update to show in WC.



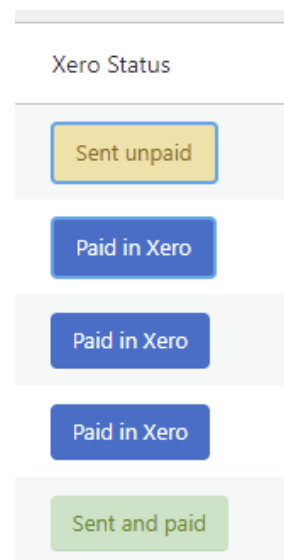
Order	Invoice Number	Date	Status	Total	Xero Status
#1947 Peterö Lloydö	OT3D-000109-1	Feb 10, 2022	Completed	£39.00	Sent unpaid
#1919 Peterö Lloydö	OT3D-000108-1	Feb 10, 2022	Completed	£39.00	Paid in Xero
#1891 Peterö Lloydö	OT3D-000107-1	Feb 10, 2022	Completed	£39.00	Paid in Xero
#1787 Ovidiu Irodiu	OT3D-000106-1	Feb 9, 2022	Completed	£14.40	Paid in Xero
#1758 Peter Lloyd	OT3D-000105-1	Feb 9, 2022	Completed	£12.00	Sent and paid
#1725 Peterö Lloydö	OT3D-000104-1	Feb 9, 2022	Completed	£39.00	Sent and paid
#1657 Ovidiu Irodiu	OT3D-000102-1	Feb 8, 2022	Completed	£14.40	Sent unpaid
#1624 Peterö Lloydö	OT3D-000101-1	Feb 8, 2022	Processing	£39.00	Sent unpaid

The light blue outline to the box indicates that the invoice has been sent automatically by Xeroom earlier in the process.

Financial Process Use

If you have business customers who place orders with payment on account “POA” then the process is as follows:

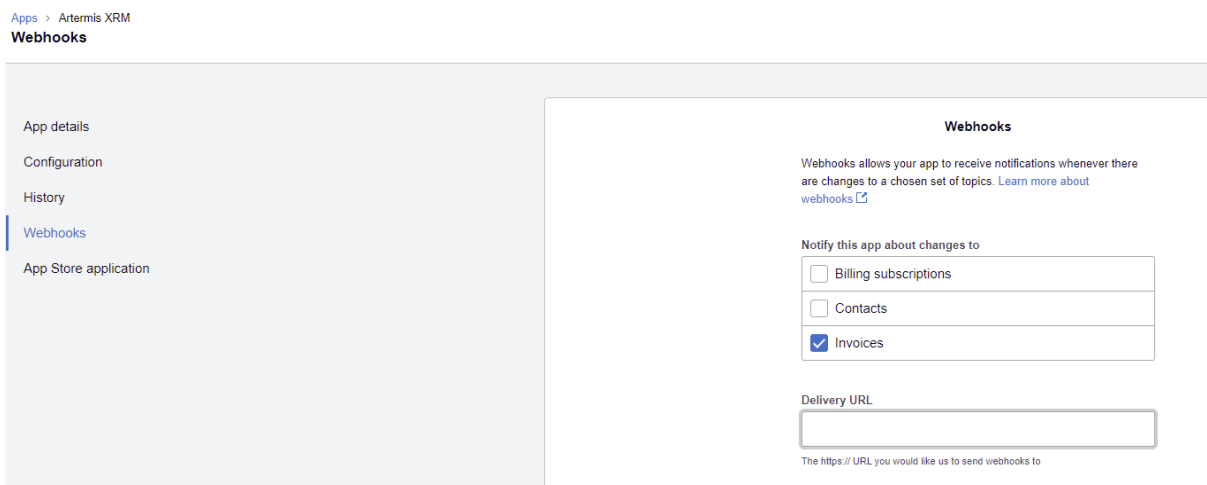
1. Customer places an order and uses the Purchase Order gateway to checkout. This captures the PO number and any other relevant details. The order status is set to hold, pending or processing depending on the setting.
2. The order is posted to Xero by Xeroom – again triggered by the setting ie status change or manually.
3. The Xero invoice is sent to the customer either automatically by Xeroom or manually.



4. The order is processed and goods despatched.
5. When the invoice or statement is due they are marked as paid in Xero.
6. Xerom updates the status in WC and completes the order.

Setup in Xerom

Xerom uses a webhook that gets triggered by Xero on certain events such as payment. To obtain your webhook go to your Xero app in <https://developer.xero.com/> and under webhooks.



Tick the invoices box and add the delivery URL which is:

https://www.websitename/wp-json/xerom/v2/invoice_callback

where websitename is your own website name with correct ending ie .com or.co.uk etc

When you hit save it will generate a webhook and status box. Copy this webhook into the box in Xerom and save it. Then go back and hit the "Send intent to receive" button. If everything is good then you will get an "ok" message. If it fails the status will be red. Check your settings are correct.

General Taxes Global Inventory Sync Global Product Sync Invoice Status Sync

Invoice Paid Sync

Update Orders Status in WooCommerce to paid if the Xero invoice has the status Paid.

Create a Xero Webhook to trigger the Invoice event

Webhooks key Webhooks key

Save data

Apps > artermis new xrm
Webhooks

App details

Configuration

History

Webhooks

App Store application

Webhooks

Webhooks allows your app to receive notifications whenever there are changes to a chosen set of topics. [Learn more about webhooks](#)

Notify this app about changes to

Billing subscriptions

Contacts

Invoices

Delivery URL

The https:// URL you would like us to send webhooks to

Webhooks key

[Copy](#)

Status

OK

Last sent at 2022-02-10 19:40:12 UTC

Errors & Troubleshooting

If the webhook has failed you will get the following message.

Status

'Intent to receive' required

Response not 200. [Learn more](#)


Last sent at 2022-02-12 13:20:30 UTC

1. Check if your server firewall or any security plugs are blocking the request.
2. Check for Cloudflare or other caching or anti-botapps that you are using to see if they are blocking it.
3. Check that your server has Ngnix enabled and set the default application to Xeroom.
4. Install the Rest API Log plugin which is under tools and that gives a lot more info on the request <https://www.websitename/wp-admin/tools.php?page=wp-rest-api-log-view-entry&id=1087>

Setting up Purchase Order Numbers

Use the WC PO Order no plugin to enable this Purchase Orders for WC number to be captured at checkout – settings for this are under WC Settings Payments.

Purchase Orders for WooCommerce Adds a Purchase Order payment method to WooCommerce.
[Settings](#) | [Deactivate](#) | [Troubleshoot](#) Version 1.8 | By McGregor Media Web Design | [View details](#)

- Direct bank transfer
- PayPal [What is PayPal?](#) 
- Invoice Payment
- Credit Card (Stripe)
- Purchase order

We will send our invoice to the address supplied.

Purchase order number*

Company name*

The PO number will then appear in the order and also in the invoice. It will also be added as an option on the invoice reference.

Order #846 details

Payment via Purchase order. Paid on November 5, 2021 @ 7:16 am. Customer IP: 82.13.31.100

General

Date created:

2021-11-05 @ 07 : 16

Status:

Processing

Customer:

Fanman (#1 - palloyd100@gmail.com)

[Profile →](#) [View other orders →](#)

Billing

Peter Lloyd
The Super co
22 Harrison Close
Twyford
RG10 0LL

Email address:

palloyd100@gmail.com

Phone:

07980567865

Shipping

Peter Lloyd
The Super co
22 Harrison Close
Twyford
RG10 0LL

Purchase order information

Purchase order number: PO1055

Invoice details:

The New Company
22 Harrison Close
Twyford
RG10 0LL
palloyd100@gmail.com

[Sales overview](#) > [Invoices](#)

Invoice INV-9507/C

Awaiting Payment

[Preview](#)

[Email](#)

[Print PDF](#)



[Invoice Options](#)

To	Date	Due Date	Invoice #	Reference	Branding theme	Online Payments	Total
Peter Lloyd The Super co 22 Harrison Close Twyford RG10 0LL UNITED KINGDOM (UK) Edit address	5 Nov 2021	4 Feb 2022	INV-9507/C	846-	Standard Invoice	None. Get set up now	12.60

Amounts are Tax Exclusive

Item Code	Description	Quantity	Unit Price	Disc %	Account	Tax Rate	Projects	Brands	Amount GBP
zg-starcross-16-12x12	Best Tile Product	1.00	10.00		Xeroom Sales	20% (VAT on Income)			10.00
shipping_price	Shipping Price	1.00	0.50		New Woocommerce orders	20% (VAT on Income)			0.50
PO-NO	Purchase order number: PO1055, The New Company, 22 Harrison Close, Twyford, RG10 0LL, palloyd100@gmail.com.	1.00	0.00	0.00					0.00

Subtotal 10.50

Total VAT 20% 2.10

TOTAL 12.60