Xeroom Full Feature List - January 2023

	Date	Summary	Benefits
Installation ✔			
PHP8 Compatability	2022	Avoid errors	php 7.4 is now desupported and deemed a security risk.
Installation - Drop down selection lists of valid Xero sales, shipping, rounding, inventory, tax methods and tracking categories	2022	Avoid errors	Preset valid selections in drop-down lists make account configuration a breeze.
Generate correct Xero URI for connection	2022	Avoid errors	Avoids problems with permalinks, makes Xero side of setup quick, easy & error free
Automatic Xero connection token refresh every 15 mins	2022	Avoid errors	Avoid connection to Xero dropping everytime more than two apps are connected to the same Xero account.
Global Product Synch - Creates all products in Xero or WC	2022	Integration	Saves tedious export/import of product codes and data between the apps with quick uploads.
Xero Authorise button		Performance	Enables quick connection to Xero for app selection, authentication and linking.
Xero API Settings		Avoid errors	Easy to set and check the Xero app connection credentials.
Invoice Settings ✔			
Invoice Number - Use Xero sequence		Invoice content	Keeps Xero numbering clean.
Invoice Number - Use Order No and set prefix and start no		Invoice content	Easy to identify invoices created from website by order no.
Invoice Number - Use invoice PDF plugin, sequential order no or other custom no	2022	Invoice content	Matches and ties orders with invoices and custom PDF plugin invoices.
Invoice Reference - Use order no	2022	Invoice content	Easy to locate relevant invoices in Xero by order no.
Invoice Reference - Add prefix and gateway	2022	Invoice content	Useful for Xero payment tracking, analysis and reconciliation
Invoice Reference - Add payment/card reference	2022	Invoice content	Useful for Xero payment tracking, analysis and reconciliation
Invoice Reference - Add customer name	2022	Invoice content	Useful for Xero payment tracking, analysis and reconciliation
Invoice Reference - Use PO number	2022	Invoice content	Customers can use PO numbers as reference on their invoices
Invoice Reference - Use custom from other plugins	2022	Invoice content	Matches and ties invoice reference to be consistent and avoid confusion.
Set custom shipping price code and description		Invoice content	Control over invoice content
Set default sales account if sales breakout not required		Invoice content	Simplifies setup
Customer Account Nos managed in WC and sent to Xero with orders - Both native and use other plugins	2022	Invoice content	Matching of the Customer Account No in Xero with that used in WooCommerce
Prevent orders with zero value from posting (in bulk send also)	2022	Avoid errors	Avoids clutter in Xero account from orders paid for with coupons
WC Order Notes optionally posted to face of invoice	2022	Invoice content	Flow of important information from the customer to Xero and delivery note
Product prices on orders can be posted as sales tax inclusive or exclusive from WooCommerce.		Avoid errors	Flexibility in how prices are kept in Xero and WooCommerce.
Payment Settings ✔			
Payment gateways broken-out with separate account mapping for each		Invoice content	Provides essential payments analysis in Xero. Also provides easy reconciliation for different bank and payment accounts.
Send payments to credit and asset accounts in Xero		Integration	Can handle payments on account and non-bank asset or liability accounts in Xero.
Ability to add, manage and use Account Funds plugin for users	2022	Integration	Ability to control and authorise purchases plus build customer loyalty.
Send payments automatically or manually		Invoice processing	Send automatically or manually one-by-one or in bulk.
Select payments that are sent automatically by gateway		Integration	If automatic then some gateways need instant payment sending on order eg card or Paypal but others need delaying until payment received eg Bank transfer, COD etc.
Payments can be sent indivually from within the order or in bulk by ticking the orders		Invoice processing	Mirror your payments process by posting as you go or at month end for B2B customers paying on monthly account.
Order Posting ✔			
Set order send timing: Automatic, instantly, on a schedule or manually one-by-one or bulk send.	2022	Invoice processing	Provides precise flexibility and control over the order posting process.
Set automatic order send triggers by WC order status: Creation, Pending Pmt, Processing, On Hold, Completed	2022	Invoice processing	Provides flexibility and control over the automatic order posting process.
Custom Order Send triggers - Can be on any custom status change created by WC Custom Order Status Manager Plugin	2022	Invoice processing	Enables your order processing sequence to be followed exactly
Coupon Code Mapping - Set and reuse same Xero code for multiple coupons	2022	Invoice processing	Avoids clutter from lots of single-use coupons
Autocomplete orders with virtual and downloadable products options	2023	Invoice processing	Once an order is sent and paid the WooCommerce status can be set to complete automatically.
If a product code doesn't exist in Xero one will be created using the SKU or if no SKU exists then with product ID.		Avoid errors	Product SKUs from WooCommerce will be used where they exist in Xero but this fallback avoids failed postings.
Xero Contact Mapping ✔			
Match existing or use new customer billing name on invoice		Invoice content	Set what customer attribute to match and use in invoice. Fallback
Match existing or use new company name on invoice		Invoice content	Set what customer attribute to match and use in invoice. Fallback prevents failed invoiced in event of missing or wrong data.
Match existing or use email on invoice		Invoice content	Set what customer attribute to match and use in invoice. Fallback prevents failed invoiced in event of missing or wrong data.
Use WooCommerce or use Xero contact address		Invoice content	Set what customer attribute to match and use in invoice.
Xero Order Management ✔			
Xero status shown for each order - eg Sent, Not Sent etc		Integration	Visual colour coded status is quick and easy to follow and identify problems
Order notes show Xero send actions and errors		Integration	All Xero relevant data is kept with the order.
Filter WooCommerce orders by Xero sent status	2022	Performance	Easy to list unsent orders for further checking, batch or individual
A range of Bulk Actions available for order processing		Performance	Makes selection and processing a breeze.

Inventory ✔

Feature	Year	Category	Benefit
Two way inventory check at time of order - for order items only		Integration	Don't sell inventory you don't have.
Set inventory Master for order check		Integration	Master can be set to Xero or WooCommerce to mirror your process
Inventory sych can be done for all products in near real-time, on a schedule		Integration	Don't sell inventory you don't have.
Inventory reduced when order posted		Avoid errors	Inventory kept accurately and up-to-date
Inventory increased when order cancelled or refunded	2022	Avoid errors	Inventory kept accurately and up-to-date
Inventory debugging tool	2022	Avoid errors	Enables Xero synch failures to be troubleshot (Xero doesn't provide
Synch log files produced for each synch		Avoid errors	Enables easy checking and trouble-shooting

Performance & Control ✔

Feature	Year	Category	Benefit
Batch processing rate control throttle and Xero API call rate optimisation and restart	2022	Avoid errors	Enables batch orders to be posted reliably without rejection by Xero and batch failure.
Set chunking size for batch processing		Avoid errors	Enables optimisation of processing speed whilst avoiding batch rejection.
Send and Resend orders one-by-one or bulk send a batch of orders by ticking the orders.	2022	Performance	Easy to send large batches for month-end or one by one.
Send payments one-by-one or bulk send a batch of payments.	2022	Performance	Easy to send large batches for month-end or one by one.
Send payments with orders or separately		Performance	Can mirror your order handling processes.
Decouple send to Xero from checkout	2022	Performance	Avoid any checkout freezes or delays for customers especially when
Automatic send of new and failed orders every 5 minutes	2022	Performance	Automatic send when checkout decoupled.
Large order (>15 items) processing	2022	Performance	Automatic retry of failed orders or batches of orders. Useful when Xero is busy and fails large orders due to slow processing and time-outs.
Licence expiry 7-day grace period added.	2022	Avoid errors	Provides time to renew licence or cover authentication issues
Bulk Send Cron Job Cancel Button Added	2022	Avoid errors	Cancel any Bulk Send jobs that don't run

Product ✔

Feature	Year	Category	Benefit
Use WC product codes, quantities, prices, taxes, coupons, discounts on Xero invoice	2022	Invoice processing	Xero invoice data matches WooCommerce source exactly
Integrate WC data into respective Xero fields not just as a memo		Invoice processing	Data is fully available for use by Xero eg reconciliations, reporting, journalling etc
Set and map product level accounts for sales, COGS, inventory, tracking categories.	2022	Reporting & analysis	Provides detail for product level reporting in Xero as well as integration to save manual updates.
Assign Xero Tracking Category values at Product Level	2022	Reporting & analysis	Make use of Xero Tracking Categories for analysis
Global Product Synch - Scheduled hard updates of product prices and descriptions in Xero from WC or from Xero to WC.	2022	Integration	Save's manual updates and keeps both systems harmonised to avoid errors and have "One version of the truth". Can specify which products to update. NB: Soft update only sets the prices needed for an invoice to be posted.
Product description length >50 characters handled	2022	Avoid errors	Xero won't accept descriptions > 50 characters and will fail the order.
Product SKU/code length >30 characters handled	2022	Avoid errors	Xero won't accept product codes > 30 characters and will fail the order. Some popular plugins use codes this long for coupons, points, subscriptions etc

Accounting ✔

Feature	Year	Category	Benefit
Create invoices as Draft, Awaiting Payment or Paid Status in Xero (if instant payment used)		Invoice processing	Flexibility and time saving if automatically approved and awaiting payment.
Credit note automatic generation on full or partial refunds	2022	Invoice processing	Keeps Xero in synch with orders
Cancelled orders not posted to Xero		Invoice processing	Avoids confusing invoices arriving in Xero
Automatic purchase bill generation in Xero stopped on inventory adjustments.	2022	Avoid errors	These bills are confusing and illogical
Xero Due Date - Set default for invoices		Invoice content	Can use the Xero default or set a custom value - useful for b2b customers paying on account at month end
Email selected Xero invoices from within WooCommerce to customer and send as a batch		Invoice processing	Can send out Xero invoices to just those customers who need them instead of all.
GST/VAT can be mapped simply or in full complexity		Invoice content	Simple setup option if not selling overseas.
Complex GST/VAT mapping by geography, product type and tax class		Invoice content	Mapping of ALL WooCommerce tax rates, EC VAT and digital service MOSS can also be modelled.
Set emailed Xero invoices to be paid or unpaid status		Invoice processing	Useful for B2B where unpaid invoices are sent on a statement at month end.
Send delivery address to invoice as well as billing address		Invoice content	Essential for order processing or shipping note generation from within Xero.
Selectable Rounding Adjustment Account		Avoid errors	Can keep WooCommerce errors separate from other sources in Xero.
Post orders into different product or category sales accounts in Xero - unlimited no		Reporting & analysis	Enables analysis of sales in Xero by product or product category.
Orders posted by product WC sub-categories to parent category sales accounts in Xero		Reporting & analysis	Mix sales breakdown by product and product category to avoid data sparcity (ie blanks in the detail) and focus on the important products.
Orders posted by geography to different Xero sales accounts		Reporting & analysis	Enables analysis of sales in Xero by geography or region or postcode.
Handling of hyphens and leading Xeros in Xero COA codes		Invoice processing	With this these will generate an error resulting in the invoice failing.
Handling of special characters by Xero		Invoice processing	With this these will generate an error resulting in the invoice failing. This can occur in the customer or company name, address, geography or product description.
Multiple currencies handled provided base currencies match		Invoice content	Orders can be taken in any currency and posted to Xero provided the WC and Xero base currencies are the same.
Failed Status Orders - Prevent being posted		Invoice processing	Avoid confusion being brought into Xero.

Synch payments made in Xero back to WooCommerce ✔

Feature	Year	Category	Benefit
Invoices paid in Xero updated in WC with autocompletion with digital and virtual product options. Status shown on order dash.		Integration	Useful for B2B customers who pay at month-end. Payment status is synched back to WooCommerce.

Coupons ✔

Feature	Category	Description
Map WC coupons - %, fixed and cart	Avoid errors	Coupons and discounts in WC are integrated into Xero and not just posted as a flat memo.
Handle taxes correctly on coupons	Avoid errors	Correct data is posted and recalculated in Xero
Map coupons > than 30 characters in length	Avoid errors	Xero rejects any invoice with coupon codes bigger than 30 characters.
Enable coupons for other coupon plugins	Avoid errors	We provide support for the main coupon plugins.

Troubleshooting ✔

Feature	Category	Description
Debug screen listing each order no and error messages from Xero and Xeroom with search	Avoid errors	Makes it easy to check why any orders failed to send and why.
Order custom fields show Xero invoice no and other info	Avoid errors	Enables checking and investigation
Log files for Global Synchs	Avoid errors	Enables checking and investigation
Connection Status Button - Active/Broken	Avoid errors	Easy to see if connection is working or not

Updates ✔

Feature	Category	Description
Free updates with bug fixes and enhancements every 1-2 months	Avoid errors	Ensure plugin performance and benefits are maximised whilst errors minimised.
WordPress and WooCommerce compatability testing 3 days from release	Avoid errors	Ensure latest version benefits flow to users.
Update using standard WordPress plugin screen	Performance	Quick and easy to update with one-click
Release notes with feature info and bug fix details	Avoid errors	Provides context and explanation to maximise benefits
Plugin update notifications 2022	Avoid errors	Ensure the latest bug fixes and enhancements are deployed

Support ✔

Feature	Category	Description
Installation - Low cost $99 installation service available	Reduce risk	Jumpstart your integration, avoid setup errors, max benefits
Knowledge Base System	Avoid errors	Self-service provides you with quick detailed answers, release notes and useful articles
Help-desk ticketing	Avoid errors	Get dedicated extra help when you need it.
Premium support services - phone, Zoom etc	Performance	Get extra help when you need it the way you want it
Presales consulting	Reduce risk	Check requirements analysis and fit for Xeroom
Post sales consulting for large projects	Extend capability/lower risk	Use Xeroom experts for system integration and customisation work
Bug fixing timescales - 1 week for core, 3 weeks for non-core	Avoid errors	Responsive solutions
Agreed enhancements - 3-4 weeks	Performance	Quick risk-free development

Compatability with other plugins: ✔

Feature	Category	Description
WooCommerce Sequential Order Number	Extend capability	Use metadata value to set
WooCommerce Order Status Manager	Extend capability	
Account Funds	Extend capability	
Customer Account Numbers - Any	Extend capability	Use metadata value to set
Custom Coupon Codes	Extend capability	
WooCommerce Invoice PDF	Extend capability	Use metadata value to set
WooCommerce Wholesale Prices	Extend capability	
WooCommerce Payment on Account	Extend capability	
WooCommerce Product Bundles	Extend capability	
WooCommerce Subscriptions	Extend capability	Compatibility added for points based SKUs and discounts.
Purchase Orders for WooCommerce	Extend capability	The PO number, name and address details get posted
Point of Sale for WooCommerce	Extend capability	
Smart Coupons for WooCommerce Pro	Extend capability	
Smart Coupons For WooCommerce Coupons	Extend capability	
Invoices for WooCommerce - Bas Elbers	Extend capability	Use metadata value to set
WooCommerce Coupon Restrictions	Extend capability	
WooCommerce Invoice Gateway	Extend capability	
WooCommerce PayPal Payments	Extend capability	
WooCommerce PDF Invoices	Extend capability	Use metadata value to set
Woocommerce PDF Invoices & Packing Slips Pro	Extend capability	Use metadata value to set
WooCommerce Product Add-Ons Ultimate	Extend capability	
WooCommerce Points & Rewards	Extend capability	
WooCommerce Stripe Gateway	Extend capability	
WooCommerce Wholesale Ordering	Extend capability	
WPC Product Bundles for WooCommerce	Extend capability	

Other Features ✔

Feature	Category	Description
Xeroom is a dedicated WordPress plugin not a separate application	Ease of use	Easy and intuitive to install, update and use. No additional platform to learn and maintain going forward.
Xeroom is focussed wholly on WooCommerce and Xero unlike other generic ETL connectors		100% focussed on integrating properly with WooCommerce and its other apps.
Secure connection to Xero used	Security	Easy to setup, use and maintain with no risk to data loss.
Bulk Data Loader Tool - for historic invoices load	Extend capability	Enables cut-over to Xero in mid accounting period.
Developed by chartered accountants and Xero certified bookkeepers	Low risk	Extensive understanding, knowledge, experience and skill deployed into Xeroom.
Coded and tested by WooCommerce plugin specialist firm	Low risk	Coded to very high quality standards to minimise bugs, errors and ensure stable operation.
Independent 5* public reviews on TrustPilot	Low risk	Trusted and endorsed by other users
Low price annual subscription of $197	Value for money	We have invested over $300,000 so far in Xeroom development and make this available for only $197 with no expensive monthly fees or transaction or data limits.
Pricing model	Value for money	Price is set not by the no of features but to be less than 1 hour of a chartered accountant's time.