

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 and linking.
Xero API Settings		Avoid errors	Easy to set and check Xero app 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
Payment Settings ✓			
Payment gateways listed and account mapping for all WC gateways		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, 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 Xero code	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
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 prevents failed invoiced in event of missing or wrong data.
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 processing

Inventory ✓

Inventory checked synch 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 synch can be done for all products near real-time	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 detail)

Performance & Control ✓

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 placing
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 ✓

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	
Global Product Synch - To do a daily hard update of product prices and descriptions in Xero from WC or from Xero to WC. Set which products to update.	2022 Integration	Save's manual updates and keeps both systems harmonised to avoid errors and have "One version of the truth".
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 ✓

Create invoices as Draft or Awaiting Payment Status in Xero	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.
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.
Failed Status Orders - Prevent being posted	Invoice processing	Avoid confusion being brought into Xero.

Synch payments made in Xero back to WooCommerce ✓

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.
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Coupons ✓

Map WC coupons - %, fixed and cart	Avoid errors	Coupons and discounts in WC are integrated into Xero and not just posted a
Handle tax 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 ✓

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 ✓

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 ✓

Installation - Low cost fixed-price services available	Performance	Jumpstart your integration, avoid setup errors, max capabilities
Knowledge Base System	Avoid errors	Self-service provides you with quick detailed answers
Help-desk ticketing	Avoid errors	Get extra help when you need
Premium support services - phone, Zoom etc	Performance	Get extra help when you need it the way you want it
Presales consulting - lead time 3 working days	Performance	Leverage Xeroom use
Post sales consulting for large projects	Performance	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: ✓

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