

# Xero Set-up

A step by step guide for mapping transactions coming from Xero and routing them to the appropriate Panels in Approval Donkey.

## Prerequisites

You will need at least one of your own (groups or members of approvers) set-up beforehand to complete the mapping. With at least one Panel you can always come back later and add more or amend them.

## General Points

- The integration with Xero and Approval Donkey only handles approvals for Invoices, Bills, Purchase Orders and Credit Notes that you '**Save and Submit for approval**'
- These transactions will be sitting in your 'Awaiting Approval' folder in Xero and are automatically pulled into Approval Donkey and routed to your approvers (Panels)
- Approval Donkey calls Xero every 5 mins and pulls any transactions in the 'Awaiting Approval' folder
- Once approved any transactions in Xero automatically move from the 'Awaiting Approval' folder to the 'Awaiting Payment' folder
- Any transactions that are declined (except for Purchase Orders) and automatically moved to the 'Drafts' folder in Xero

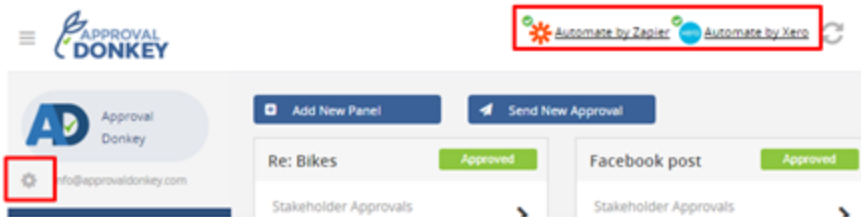
## Step by Step Set-up

Note: To set-up conditional mapping using e.g. tracking codes or set amounts please refer to the '**Xero Conditional Fields**' Guide.

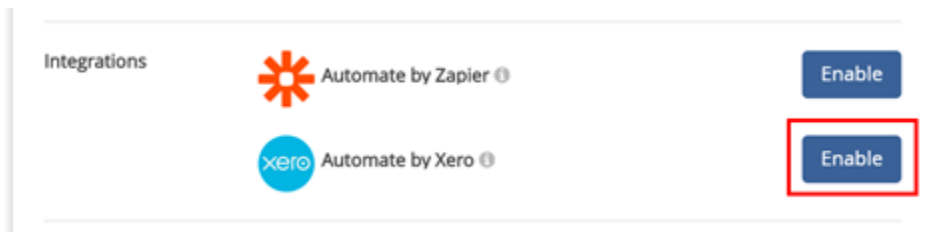
Login to the Approval Donkey Dashboard



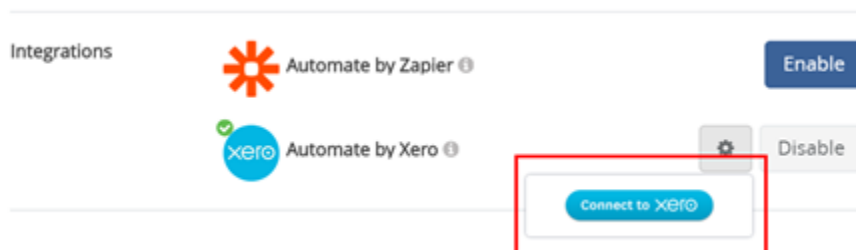
Select the Integration Icon to go to the Settings page.



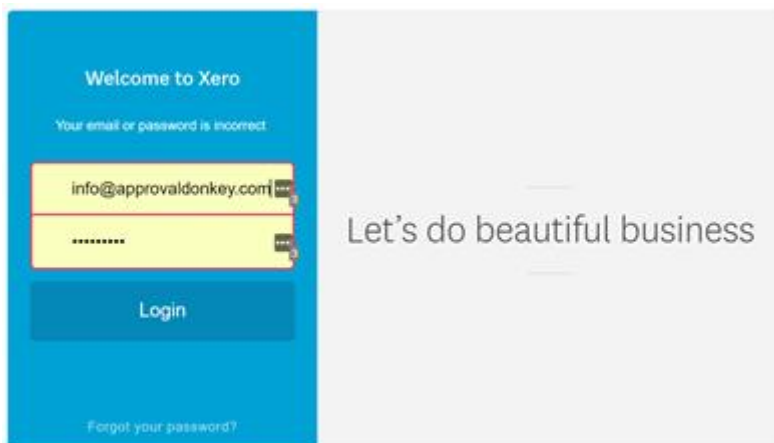
Select the Enable button for the Xero icon.



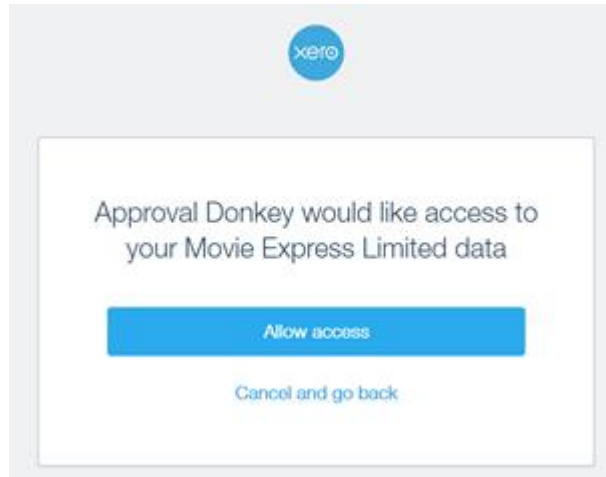
Select 'Connect to Xero'



Login to the Xero organization you want to integrate with Approval Donkey.



Allow access for Approval Donkey to access your organizations data.



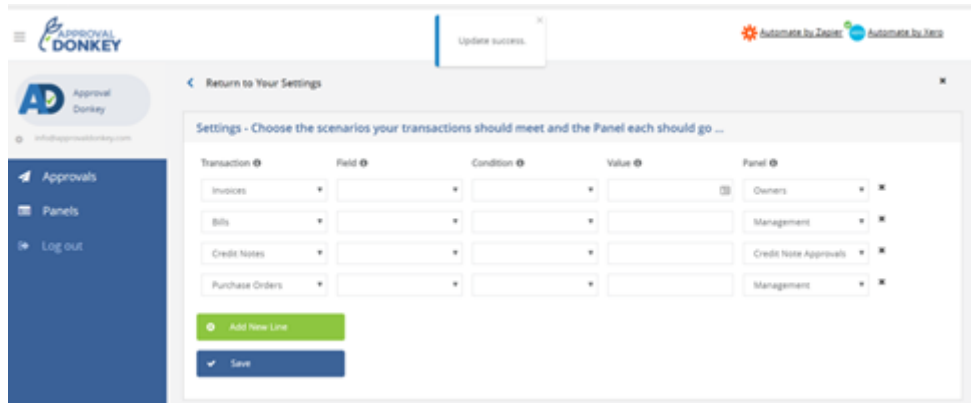
You will then be taken back to the Xero Settings [page](#). To complete a basic Transaction to Panel mapping follow this [guide](#). To set-up conditional routing of Approvals e.g. by tracking ID etc then see the 'Xero Condition Mapping' Guide.

A screenshot of the Xero Settings interface titled "Settings - Choose the scenarios your transactions ...". It features a table with five columns: "Transaction", "Field", "Condition", "Value", and "Panel". Each column has a dropdown menu. The "Value" column contains a text input field. Below the table are two buttons: a green "Add New Line" button and a grey "Save" button.

Complete a basic transaction to Panel mapping with no conditions and select 'Save'

A screenshot of the Xero Settings interface titled "Settings - Choose the scenarios your transactions should meet and the Panel each should go ...". It features a table with five columns: "Transaction", "Field", "Condition", "Value", and "Panel". The "Transaction" column has dropdown menus with "Invoices", "Bills", "Credit Notes", and "Purchase Orders" selected. The "Panel" column has dropdown menus with "Owners", "Management", "Credit Note Approvals", and "Management" selected. Below the table are two buttons: a green "Add New Line" button and a blue "Save" button.

The mapping is now complete.



Now whenever you **'Save and Submit for approval'** any Invoices, Bills, Purchase Orders or Credit note in Xero they will automatically appear in your Approval Donkey Dashboard and everyone in the Panel will get an emailed approval request.

