Xero Approval Requests

How transactions are sent for approval from Xero to Approval Donkey and the subsequent behaviour of these transactions in Xero.

Prerequisites

For any transactions to be sent from Xero to Approval Donkey the integration between these apps must be set-up first.

To learn how to set-up this integration see the guide: **Setting up Xero Integration**

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

Step by Step - Overview

Note: This overview only shows you the behavior of a Xero to Approval Donkey and back to Xero integration, for details on how to set this integration up please refer to the Xero Set-up guide.

Login to your integrated Xero organisation



Create a Xero transaction (Invoice, Bill, Purchase Order or Credit Note)

Note: Only Bill example shown.



Complete the transaction details and '**Save & submit for approval'** this will automatically route this transaction to Approval Donkey and the Panel you have mapped for the integration.

N	ew Bill				
tom	Dute Due Due Date	* Anterence			700 0.00
				Amounts are	Tax Inclusive
ten i	Description	Qty Unit Price Account	Tax Rate	Operations	Amount NZD
					×
					×
Add a new line 🔹	Assign expenses to a customer			Subtonal	0.00
				GST	0.00
				TOTAL	0.00
Seve as draft					
Save (continue editing)					
Save & submit for appro-	-				
tere & add another	Save and submit for approval				

Xero transactions will automatically appear in your Approval Donkey Dashboard with a 'Pending'status.

Bill from Movie Express Limited for Test AD	Pending
Xero Integration 4 days ago 0 comments %	>

Panel members will also be automatically emailed an Approval Request and can Approve or Decline the request directly from email.

Iello Be	n Work
len Palmer	has submitted a new approval request for you
	Here's bill for NZD 300.00.
	The amount outstanding of NZD 300.00 is due on 03 Feb 2018.
	View and pay your bill online: [Online Bill Link]
	From your online bill you can print a PDF, export a CSV, or create a free login and view your outstanding bills.
	If you have any questions, please let us know.
	Thanks, Movie Express Limited
	Approve Request X Decline Request

Any 'Pending' transactions in Approval Donkey will be in the 'Awaiting Approval' folder in Xero.

All Dra	ft (0) Awaiting App	Awaiting Payment (3)	Paid Repe	ating	
Approve	Delete Print M	lo items selected			
ef	From	Date 🕶	Du	Due Date	
	Test AD	2 Feb 2018	3 F	eb 2018	
	Test AD	2 Feb 2018	9 F	eb 2018	
	Test	2 Feb 2018	9 F	ab 2018	

When all required approvers have approve a transaction on Approval Donkey the status changes to 'Approved'.

Bill from Movie Express Limited for Test AD	Approved
Sample Panel 4 days ago 0 comments %	>

Any 'Approved' transactions in Approval Donkey will automatically shift transactions to the 'Awaiting Payment' folder in Xero.

All	Draft (0)	Awaitir	ng Approval (3)	Awaiting	Payment (1)	Paid	Repeating
Schedule	of Planned Pay	ments					
				Set a Pl	anned Date on bills	to create a p	payment schedule
Print	Batch P	wment	Schadula Pauma	nte No it	erres selected		
Print	Batch Pa	ayment	Schedule Payme	nts No ite	erms selected		
Print	Batch Pa	ayment	Schedule Payme	nts No Ite	erns selected Due Dat	e	Plar

The History & Notes section in Xero is automatically updated in Xero and time stamped.



Tracking and history is always available from Approval Donkey.

Tracking		Status	\$
🕒 Ben AD		*	Approved
🙆 Kerry Palmer	Owner	× .	Approved
History			
🕒 Kerry Palmer	Approved the request		4 days ago
🕒 Ben AD	Added attachment 🧠 Bill.pdf		4 days ago
🕘 Ben AD	Created the request		4 days ago