

Changing Xero Configuration

A step by step guide for changing the configuration of your transactions coming from Xero and routing them to in Approval Donkey

Prerequisites

Typically, you will have already set-up your Xero integration by using the '**Setting up Xero Integration**' guide and you are just amending 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**' in Xero
- 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 via Approval Donkey any transactions in Xero automatically move from the 'Awaiting Approval' folder to the 'Awaiting Payment' folder

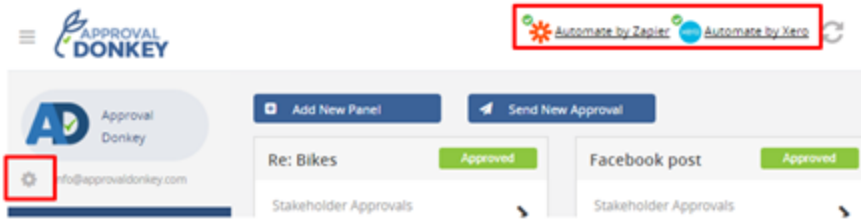
Step by Step Set-up

Note: To change conditional fields using e.g. using 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.



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.

Transaction	Field	Condition	Value	Panel
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

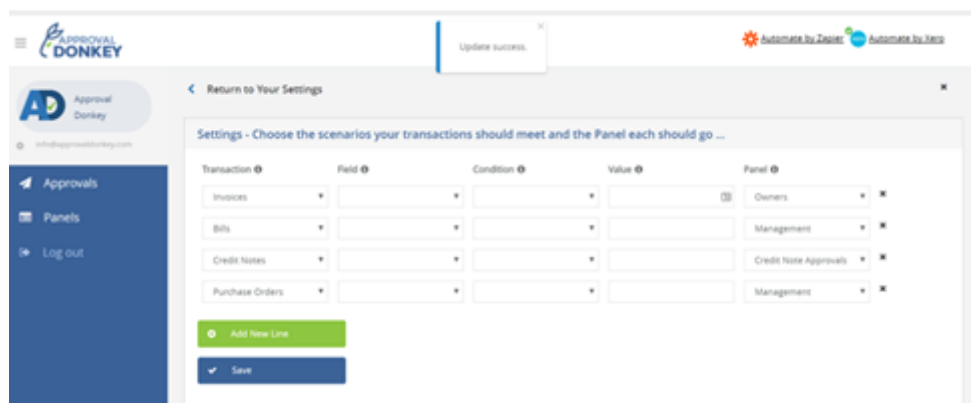
Buttons: Add New Line, Save

From the drop downs complete a basic transaction to Panel mapping with no conditions and select 'Save'

Transaction	Field	Condition	Value	Panel
Invoices	<input type="text"/>	<input type="text"/>	<input type="text"/>	Owners
Bills	<input type="text"/>	<input type="text"/>	<input type="text"/>	Management
Credit Notes	<input type="text"/>	<input type="text"/>	<input type="text"/>	Credit Note Approvals
Purchase Orders	<input type="text"/>	<input type="text"/>	<input type="text"/>	Management

Buttons: Add New Line, Save

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.

