



Merfantz Technologies Pvt. Ltd

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# Xero Integration with Salesforce

## STORY:

Our customer is using Salesforce CRM to organize all of their business contacts, products, vendors and their leads.

Their sales team also uses Xero accounting Software to raise sales invoice. They were looking for a solution to eliminate the need of re-entering the data in Xero, reduce manual data errors and track invoice status from Salesforce.

## The Challenge:

- 👉 Our Customer wants to sync Accounts in Salesforce and contacts in Xero accounting software.
- 👉 When an opportunity is closed and won in Salesforce, Customer wants to send unpaid sales invoice to Xero and also to create the associate products in Xero
- 👉 When the sales invoice is created in Xero, Customer wants to create the Account, Contacts, Opportunity and related products in Salesforce.
- 👉 Wants to streamline the billing process and reduce the time to payment
- 👉 Wants to track the invoice status from Salesforce

## Process Flow



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## The Solution:

- 👤 There are many ways that we can integrate Xero with Salesforce. We have used Salesforce Rest API for connecting to Xero Apex via OAuth
- 👤 Connecting via Salesforce Apex classes is bit easy and no need to spend money on integrating tools
- 👤 User can raise Invoice creation from Account, Opportunity, Order & Custom Objects in Salesforce
- 👤 Using Oauth is a secure way of protecting the data flow between Salesforce and Xero
- 👤 Two way syncing between xero and Salesforce speed up the sales cycle.
- 👤 Track the invoice status at one place (Salesforce)
- 👤 There are also N-number of paid tools available in the market to integrate Xero with Salesforce. ( e.g, zapier, Breadwinner, workato,etc...) These Integrating tools are more efficient