



Stellarise Connector for Dynamics 365 and Xero

User Guide

V3



What is Stellarise Connector for Dynamics 365 and Xero?	3
What is new?.....	4
How do you setup Stellarise Connector for Dynamics 365 and Xero?	6
How does Stellarise Connector for Dynamics 365 and Xero work?	20
<i>Open/Create an invoice in Dynamics</i>	20
<i>The Dynamics 365 Invoice</i>	21
<i>Sync the invoice with Xero</i>	23
<i>Sync payments from Xero</i>	25
<i>Account and contact outstanding and overdue amount in Dynamics</i>	26
<i>How to troubleshoot Stellarise Connector for Dynamics 365 and Xero issues?</i>	27



What is Stellarise Connector for Dynamics 365 and Xero?

Stellarise Connector for Dynamics 365 and Xero quickly syncs invoices, payments, and accounts between Microsoft Dynamics 365 and Xero systems.

An Intelligent Connection

Stellarise Connector for Dynamics 365 and Xero intelligently moves the right information from Microsoft Dynamics 365 to Xero, allowing you to mix and match Existing products alongside Write-In products in each invoice. Choose whether you want Dynamics 365 to create new Xero contacts, or only push through invoices for those existing already. Similarly, you can choose if you want Dynamics 365 to create new Xero Items, or only create an invoice if these exist already.

Easy to Manage

Never be left in the dark as to why an invoice failed to make it through to Xero. Built-in Sync history gives you full visibility on any sync issues for each invoice putting you in control, so you can resolve them.

Fully Customisable

Our easily configured standard plans are suitable for most users. But if you have custom fields in Dynamics 365 that you want to sync across to Xero, no problem, Stellarise Connector for Dynamics 365 and Xero can cope. [Contact us to discuss your custom configuration requirements](#) and we can quickly customise your template to sync anything you need.



What is new?

Stellarise Connector for Dynamics 365 and Xero continuously evolves itself. Here the list of new features you can use when connecting your Dynamics to your Xero with Stellarise Connector for Dynamics and Xero.

Xero API TLS 1.0 Deprecation

Ensured the connector is compliant with latest Xero security standards.

All settings centralised in your Dynamics 365 instance

We've simplified the way you manage connections by moving the configuration settings from the Stellarise portal to Dynamics 365.

Each of the settings are now in your 'DynamicsXeroConnector Settings' Dynamics entity and are widely described in the entity itself.

Create User documentation (video and docs)

More complete user documentation.

Handle Cancellations of invoices in Dynamics and Xero

If you delete an invoice in Dynamics we delete the related invoice in Xero, if its status is in 'draft'. If in Xero the invoice is already approved, we void the Xero invoice and create a Xero credit note. No longer need to manually update Xero with cancellations.

Add amount due to invoices in Dynamics

You can now see the amount that is due on an invoice in Dynamics so this makes it easier for you to chase payments. You can also see the outstanding amount per Dynamics Customer!

Clear error message in Dynamics on Xero authorisation problems

More details on error messages so you can better understand Xero issues when troubleshooting connection problems.

Microsoft App Source update with new solution

You can install the Stellarise Connector for Dynamics and Xero directly from the Microsoft App Source.

Fixed issue about duplicating connections in Dynamics.

Removed the 'DynamicsXeroConnector' Dynamics entity creation from the periodic batch script.






Now Stellarise Connector for Dynamics and Xero immediately creates the 'DynamicsXeroConnector' Dynamics entity at the connection creation.

How do you setup Stellarise Connector for Dynamics 365 and Xero?

Our products portal is available on <https://nqt.stellarise.com>.

Existing users can login to our portal using their registered email and password.

[Register](#)



Welcome to Stellarise Connector

Email

Enrico.degaudenzi@stellarise.com

Password

Login


☒ Remember Me

[Register](#)

[Forgotten password?](#)

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New users can register their details by clicking on the “Register” link on the left top corner.



Stellarise Connector

Register to access online nuggets of software gold.

First Name

Last Name

Email Address

Company

Company Phone

Country

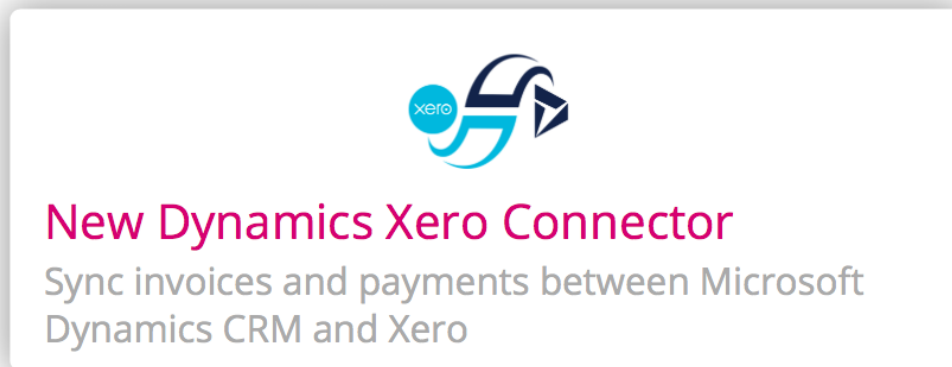
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Once the user successfully registers and logs in to our portal, it can create new connections, manage its existing connection settings and subscriptions, and amend their billing details using the main menu on the portal.

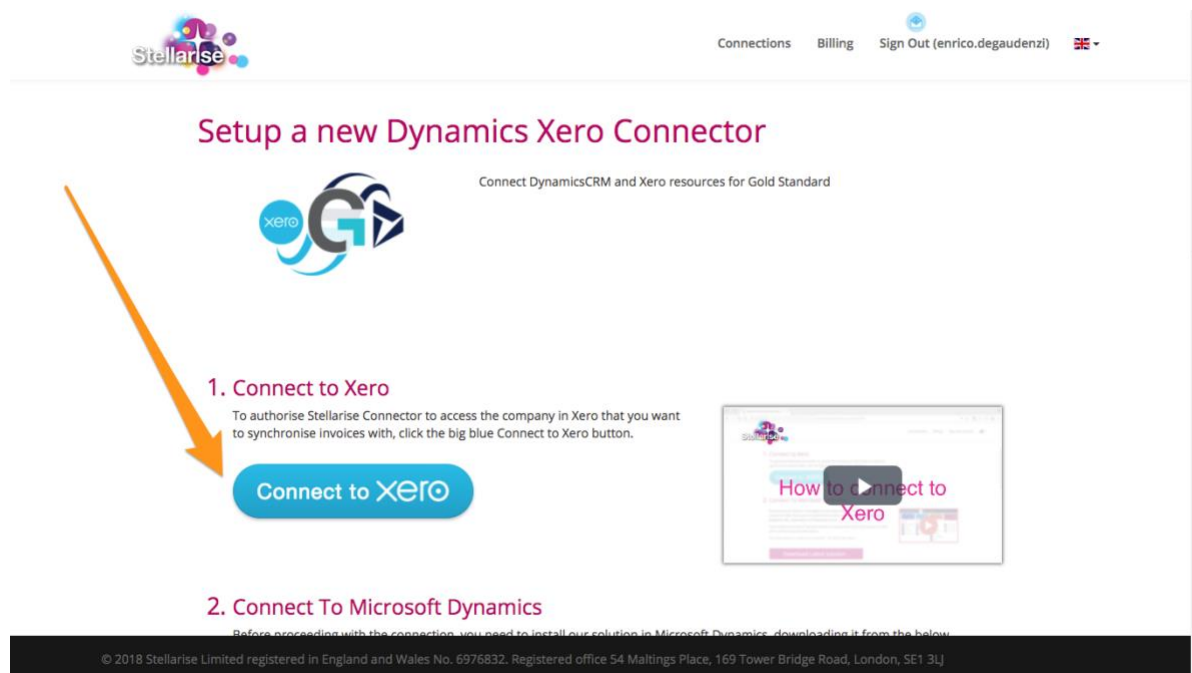
Click on “Create a New Connection” button

Select the connection type from the dropdown.

Please note, by registering on our portal you will have access to all our public apps.



Once you have selected “New Dynamics Xero Connector”, you will be taken to the connection setup page. On this page, you can find useful information and videos that will help you to setup the connection.





In the connection page, the first step is to connect to Xero and give permission for our connector to access your Xero Organisation data. *Please note, our connector **does not** store any data coming from your Xero or Dynamics 365 instances, it just syncs the data between the two systems.*

Click on “Connect to Xero” button to allow Stellarise Connector to access your Xero endpoint. You will be taken to the Xero login page, where you have to login to Xero with your credentials.

The Xero login page is split into two main sections. The left section has a blue background and contains the text "Welcome to Xero" at the top. Below it, a message states: "To authorise the application Stellarise Connector, simply login to your Xero account...". There are two input fields: "Email address" with an envelope icon and "Password" with a lock icon. A blue "Login" button is below the fields, and a link "Forgot your password?" is at the bottom. The right section has a light grey background and the text "Better protect your Xero data with two-step authentication". It features a blue box with a shield icon containing a lock, and a button labeled "Play video" with a play icon.

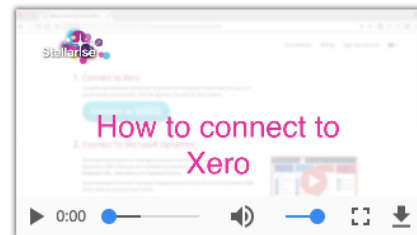
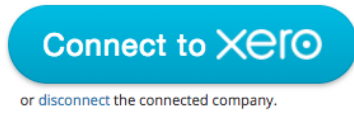
Once you have logged in, you need select the Organisation you want to be synchronised and click on the “Allow access”. Then you will be redirected back to our portal.

The Xero permission screen has a light grey background. At the top center is the Xero logo (a blue circle with the word "xero" in white). In the center is a white box with a thin grey border. Inside this box, the text reads: "Stellarise Connector would like access to your Demo Company (UK) data". Below this text are two buttons: a blue "Allow access" button and a blue "Cancel and go back" link. At the bottom of the screen, below the white box, is a paragraph of text: "By allowing access, you agree to the transfer of your data between Xero and this application in accordance with Xero's terms of use and this application's terms of use and privacy policy. You can disconnect this application at any time by going to Add-ons in your Xero Settings."

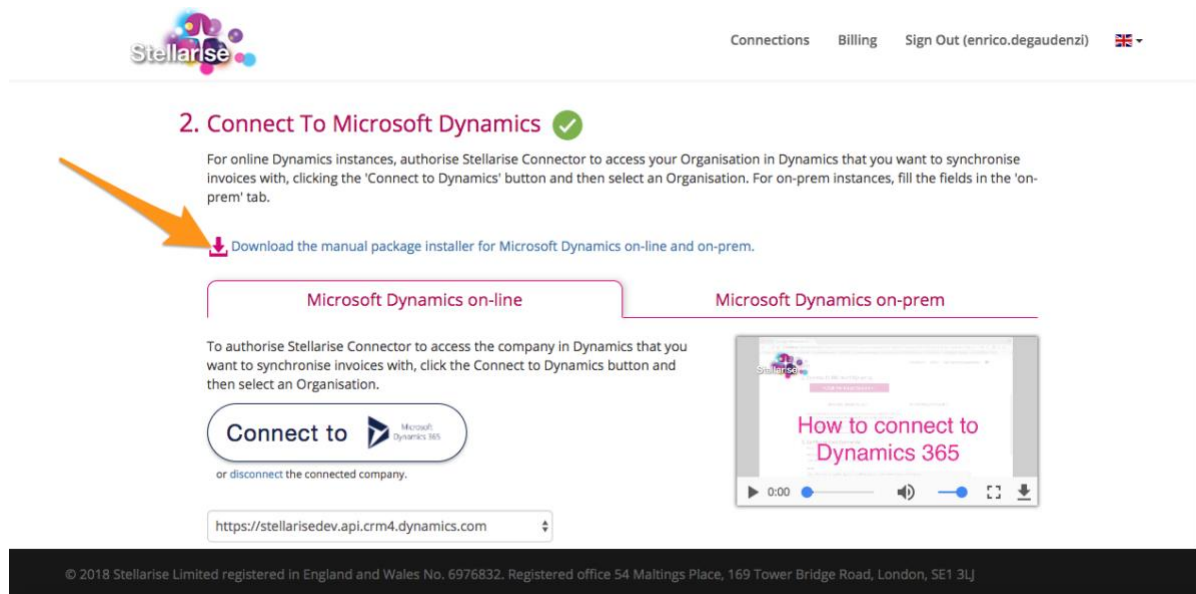
If the connection was successful, you will see your Xero company name and a green sign instead of the original “Connect to Xero” button.

1. Connect to Xero (Demo Company (UK))

To authorise Stellarise Connector to access the company in Xero that you want to synchronise invoices with, click the big blue Connect to Xero button.



You now need to install our solution into your Dynamics 365 instance and setup the connection to your Dynamics 365 Organisation.




2. Connect To Microsoft Dynamics ✓

For online Dynamics instances, authorise Stellarise Connector to access your Organisation in Dynamics that you want to synchronise invoices with, clicking the 'Connect to Dynamics' button and then select an Organisation. For on-prem instances, fill the fields in the 'on-prem' tab.

Download the manual package installer for Microsoft Dynamics on-line and on-prem.

Microsoft Dynamics on-line **Microsoft Dynamics on-prem**

To authorise Stellarise Connector to access the company in Dynamics that you want to synchronise invoices with, click the Connect to Dynamics button and then select an Organisation.

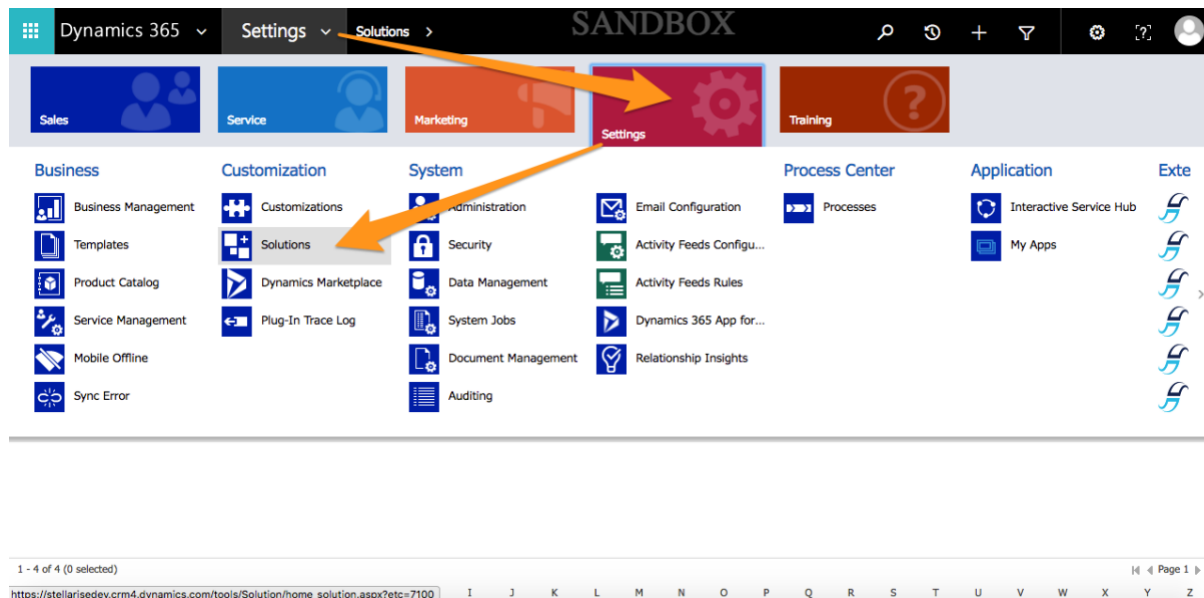
Connect to 

or disconnect the connected company.

<https://stellarisedev.api.crm4.dynamics.com>

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When you have downloaded the .zip file containing our solution, install it into Dynamics 365. To do this, enter your Dynamics 365 Instance and go to Settings > Solutions as showed in the picture below.



Dynamics 365 **Settings** **Solutions**

Sales **Service** **Marketing** **Settings** **Training**

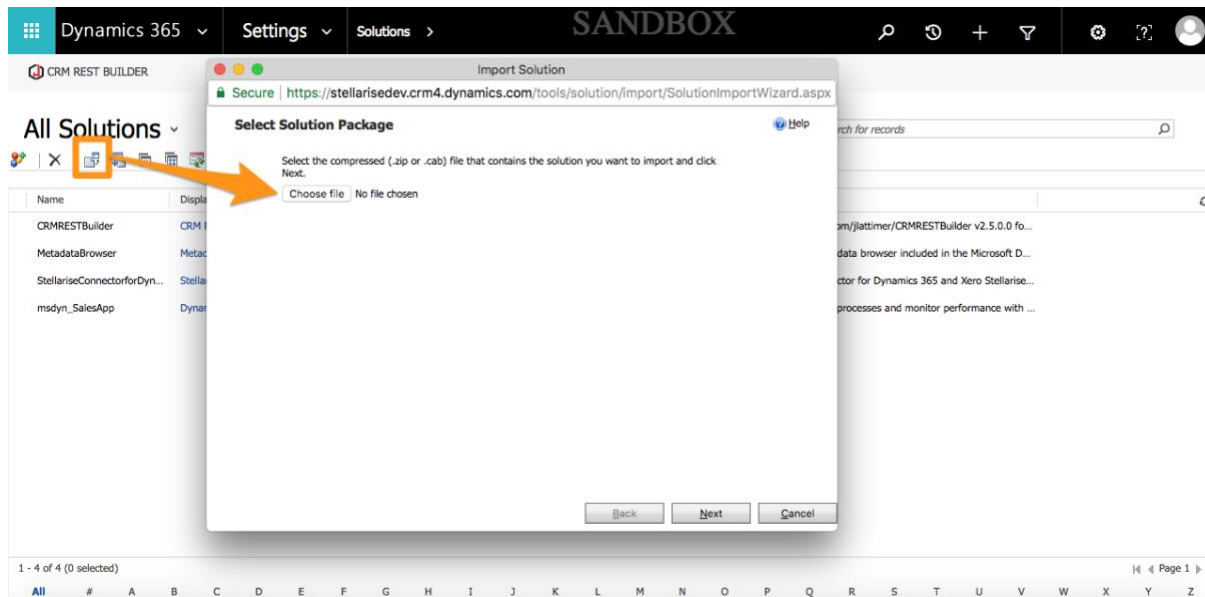
Business **Customization** **System** **Process Center** **Application** **Ext**

Business Management, Templates, Product Catalog, Service Management, Mobile Offline, Sync Error, Customizations, Dynamics Marketplace, Plug-In Trace Log, Administration, Security, Data Management, System Jobs, Document Management, Auditing, Email Configuration, Activity Feeds Configur..., Activity Feeds Rules, Dynamics 365 App for..., Relationship Insights, Processes, Interactive Service Hub, My Apps

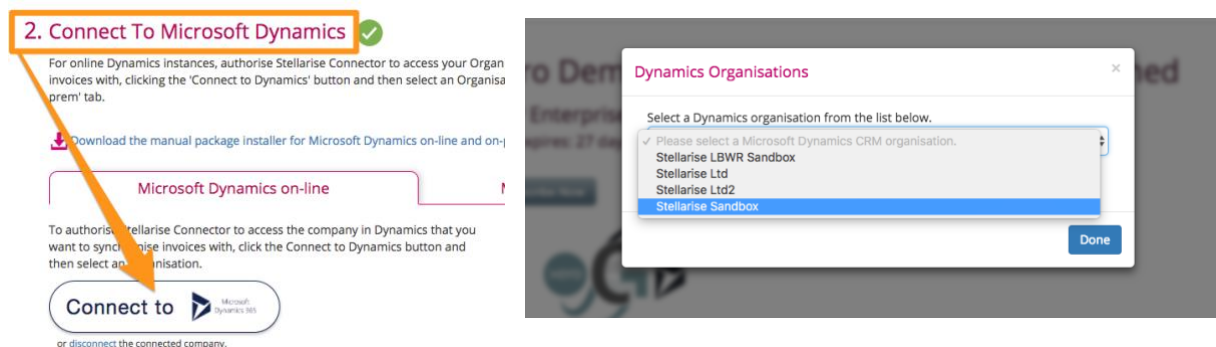
1 - 4 of 4 (0 selected)

https://stellarisedev.crm4.dynamics.com/tools/Solution/home_solution.aspx?etc=7100

Click on the 'import solution' button, select the downloaded .zip file and follow the installation flow provided by Dynamics365.



Once our solution is installed into your Dynamics 365 instance, the connection details can be completed on the Stellarise Connector web page: click on the 'Connect to Dynamics' button, allow Stellarise App to access your Dynamics Organisation information (as per Xero) and then select your Organisation when requested:



Please note, the Dynamics user **must** have the following permissions:

1. Invoice entity: read-write
2. Invoice detail entity: read-write
3. Product entity: read
4. System user entity: read
5. Account entity: read-write
6. Contact entity: read-write
7. Stl3_dynamicsxeroconnector entity: read-write
8. Stl3_brandingtheme entity: read-write
9. Stl3_chartofaccounts entity: read-write
10. Stl3_stellariseconnectorsettings entity: read-write



- 11. Stl3_synchistory entity: read-write
- 12. Stl3_taxtype entity: read-write
- 13. Stl3_xerodetails entity: read-write

As last step, you can set the defaults for the connector as you can see below:

3. Configure Your Connector

[See our pricing plans](#)

Subscription

GBP XeroDynamicsConnector for less than 20 Users

Name

2018-03-28 09:43:21 | default\$::\$Dynamics endpoint - Xero endpoint | Default plan

Synchronisation Center

1. Tax Rates

2. Account Codes

3. Branding Themes

Detailed Dynamics and Xero preferences can be found and set on your Dynamics instance, at the related Stellarise Connector Settings entity.

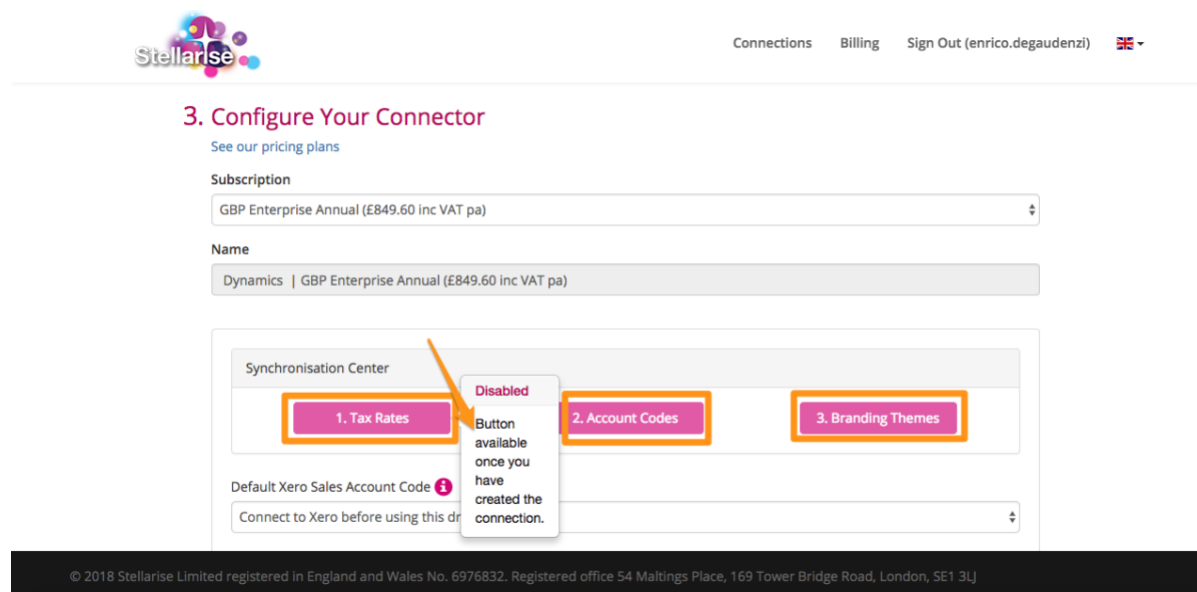
Timezone

(UTC+01:00) Europe/London

Create Connection


- Subscription:** Select the plan you prefer to run your Stellarise connector.
- Time zone:** Your Dynamics and Xero Timezone.

Before clicking on 'Create Connection' you cannot synchronise Tax Rates, Account Codes and Branding Themes from Xero to Dynamics 365. During the connection creation they are **disabled**; they will be enabled once you have created the connection.



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We are now all set; your free trial will start once you save the connection.



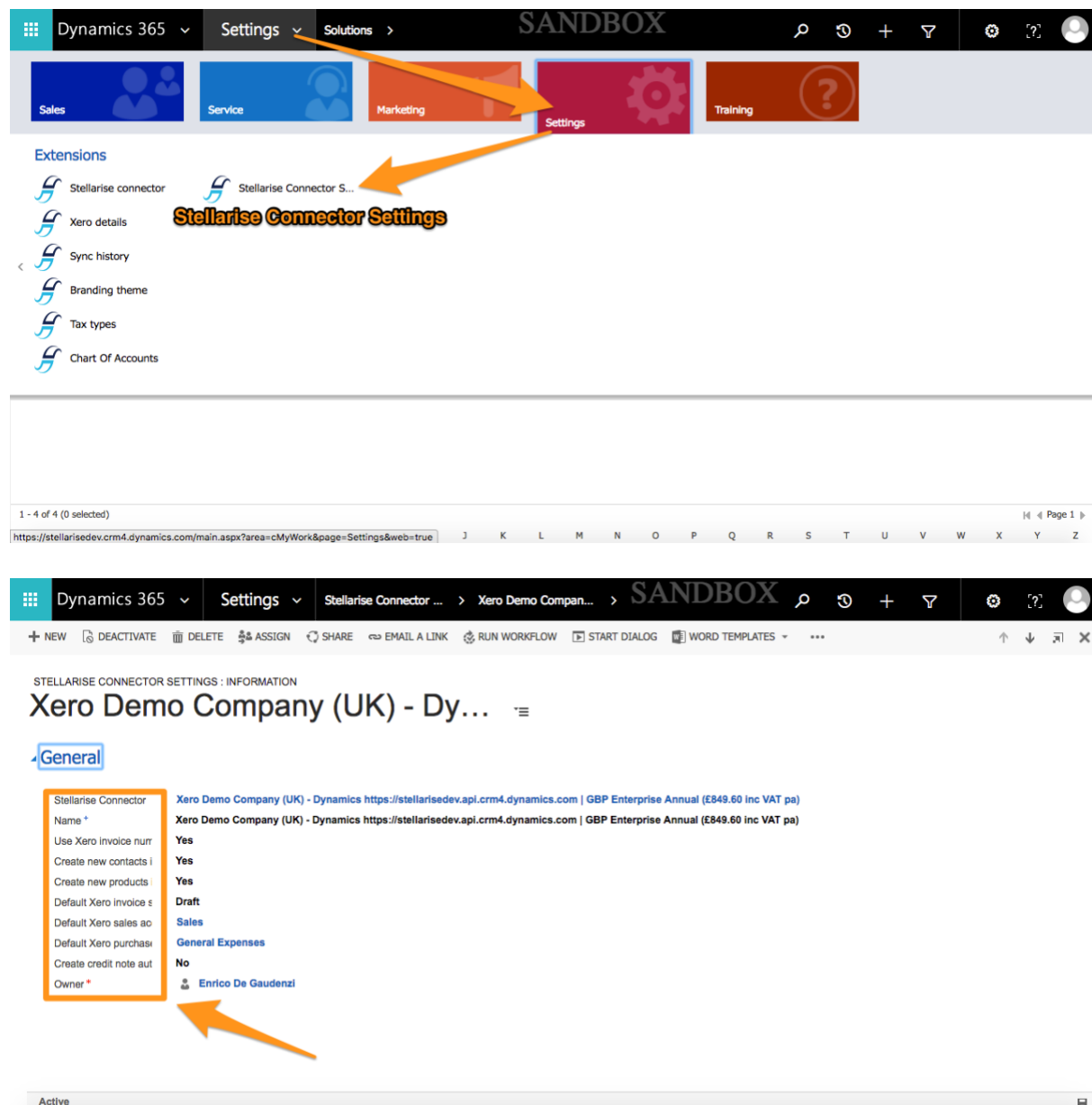
Xero Demo Company (UK) - Dynamics dxcdev.stellarise.com

GBP Quick renew plan trial expires: 26 days

✓

Subscribe Now

Notes: once you click on 'Create Connection' you MUST check and change the default configuration values in Dynamics 365:



Stellarise Connector Settings

General

Xero Demo Company (UK) - Dynamics <https://stellarisedev.api.crm4.dynamics.com> | GBP Enterprise Annual (£849.60 inc VAT pa)

Xero Demo Company (UK) - Dynamics <https://stellarisedev.api.crm4.dynamics.com> | GBP Enterprise Annual (£849.60 inc VAT pa)

Use Xero Invoice number: Yes

Create new contacts: Yes

Create new products: Yes

Default Xero Invoice status: Draft

Default Xero sales account: Sales

Default Xero purchase account: General Expenses

Create credit note automatically: No

Owner: Enrico De Gaudenzi



Use Xero invoice number: If Yes, the Xero invoice numbering scheme will be used for the invoice in Xero. If this is set to No, then the Dynamics Invoice ID will be used as the Invoice Number in Xero.

Create new contacts in Xero: If Yes then products in Dynamics will be created as Inventory Items in Xero the first time that they are seen. If this is not ticked, then the invoice will still be created, but no inventory items will be created in Xero.

Create new products in Xero: If Yes, details from the Account or Contact against the Invoice in Dynamics will be used to create a Contact record in Xero. This is a one-time synchronisation only; subsequent changes either in Xero or Dynamics will not be copied across to the other system. If this is not ticked and the Contact record in Dynamics does not exist in Xero, then the Invoice will not be created in Xero. A Sync history record explaining why this has failed to be created in Xero will be attached to the invoice in Dynamics. You can use this feature to enforce a workflow that ensures that Invoices in Xero are only created for known contacts.

Default Xero invoice status: Sales invoices and purchase invoices sent from Dynamics to Xero can be in Draft, Submitted or Authorised status. Draft and Submitted invoices can be edited before they are approved. Either of these can be used to check an invoice prior to sending it out from Xero. With an Authorised invoice, only limited changes can be made.

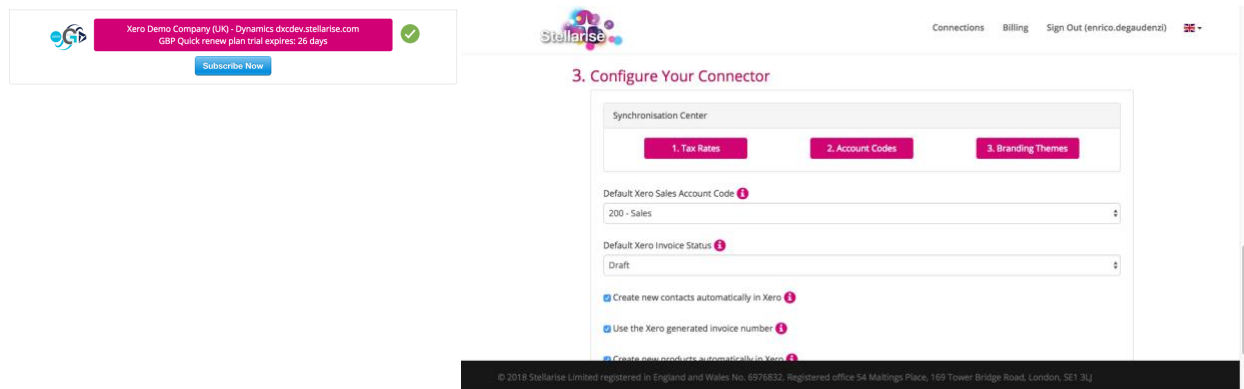
Default Xero sales account code: The Default Sales Account Code is applied against your invoice lines, if you don't specify it. If the Tax Rate has not been set for the product in Xero, the Tax rate that has been set will also be used.

Default Xero purchase account code: The Default Purchase Account Code is applied against your bill lines, if you don't specify it. If the Tax Rate has not been set for the product in Xero, the Tax rate that has been set will also be used.

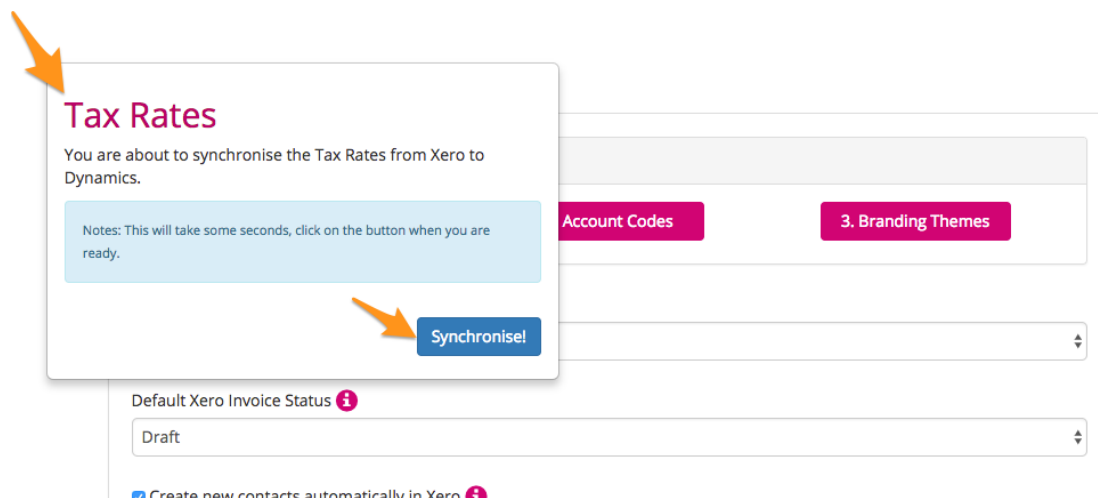
Create credit note automatically: If Yes, on cancellation a credit note will be automatically created and synced to Xero. If the invoice is DRAFT or SUBMITTED in Xero, when the invoice is cancelled in Dynamics we will just delete the draft invoice in Xero. If the invoice is APPROVED in Xero, when the invoice is cancelled in Dynamics we will create a credit note in Xero for the full invoice amount and apply it to that invoice. If the invoice is PAID in Xero, then a Sync history record will be created with the message: The Invoice is fully paid in Xero. If the invoice is PART PAID in Xero, then when the invoice is cancelled in Dynamics we will create a credit note in Xero for the full invoice amount. We will NOT apply it to that invoice - this will need to be manually carried out. If No, Dynamics 365 default cancellation process will be used and credit notes need to be created manually.

Update existing connection settings

You must do this step to have all your Xero Tax Rates, Account Codes and Branding themes imported into Dynamics 365. To update your existing connection and synchronise these entities, just click on the connection name in our portal.



The synchronisation Center is now enabled and you can click on the synchronisation buttons to import all your required Xero data into Dynamics 365.



Synchronisation MUST be done in the following order:

1. Tax Rates
2. Account Codes
3. Branding Themes

Read carefully the messages in the pop window and after you clicked on 'Synchronise' button please wait for the answer that will appear right under the button! **For Account Codes, this operation could even take minutes.**

Notes: Apart from the Synchronisation Center, all the other information needs a click on 'Update Connection' to actually save the changed details.



Pay for your connection

To pay for your connection, click on the “Subscribe Now” button under your connection name and follow the instructions. For other available payment options, please contact us at servicedesk@stellarise.com.

A screenshot of a payment form titled "Stellarise Nuggets". The form includes a header with the title and a sub-header "Subscribe to: GBP Quick renew plan". Below this is an email address "molnus@freemail.hu". The main form area contains three input fields: "Card number", "MM / YY", and "CVC". At the bottom, there is a blue button labeled "£5.00 per day".

Stellarise Nuggets

Subscribe to: GBP Quick renew plan

molnus@freemail.hu

Card number

MM / YY CVC

£5.00 per day

Amend your billing details

To change your billing details, click on the “Billing” menu option on the home screen.

Set Up Billing

Your Details

First Name

Last Name

Email Address

Company Phone Number

Company Position

Company

☐ Company VAT exempt

Update Details

Company Address

Address Line 1

Address Line 2

Address Line 3

City

County/State

Postcode/ZIP Code

Country

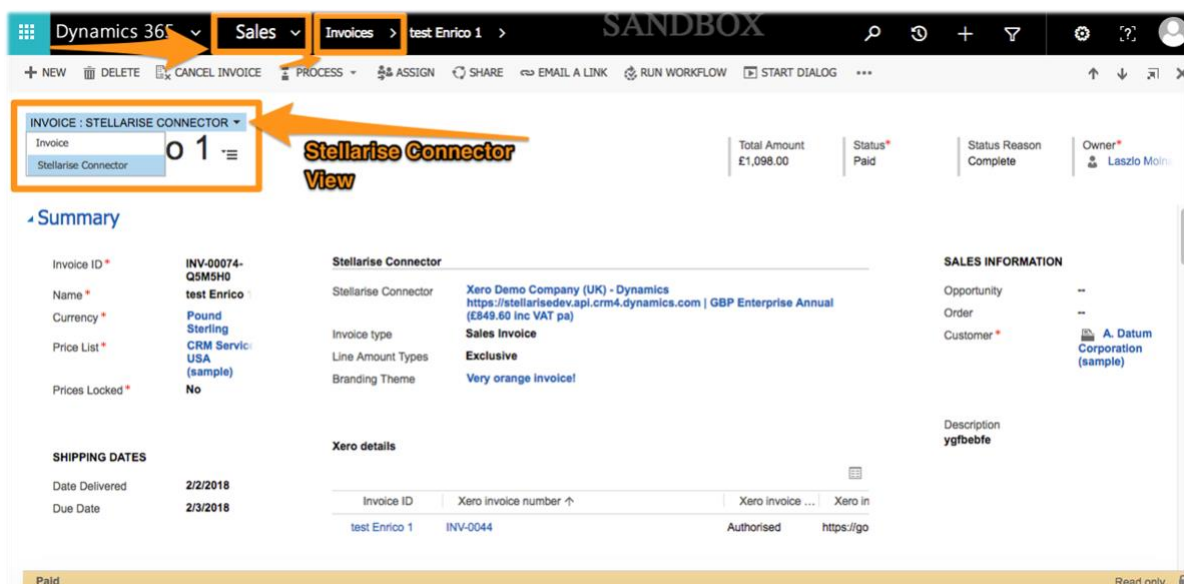
After you changed the details, click on the “Update Details” button to save your changes.

How does Stellarise Connector for Dynamics 365 and Xero work?

Stellarise Connector for Dynamics 365 and Xero syncs accounts, contacts and invoices from Dynamics 365 to Xero and syncs calculated tax, invoice status, contact outstanding and overdue amount from Xero to Dynamics.

Open/Create an invoice in Dynamics

Our Dynamics 365 solution adds new functionalities to your Dynamics instance. To see the Stellarise Connector for Dynamics 365 and Xero related information, create or open an existing invoice in Dynamics 365 and change the View using the form selector:



The screenshot displays the Dynamics 365 interface for a 'test Enrico 1' invoice. The top navigation bar shows 'Dynamics 365', 'Sales', and 'Invoices'. The 'Sales' and 'Invoices' tabs are highlighted. A dropdown menu for 'INVOICE : STELLARISE CONNECTOR' is open, showing 'Invoice' and 'Stellarise Connector' options. An orange arrow points to the 'Stellarise Connector View' label. The main content area shows a summary of the invoice, including details like Invoice ID, Name, Currency, and Shipping Dates.

Summary	
Invoice ID *	INV-00074-Q5M5H0
Name *	test Enrico
Currency *	Pound Sterling
Price List *	CRM Service: USA (sample)
Prices Locked *	No
SHIPPING DATES	
Date Delivered	2/2/2018
Due Date	2/3/2018

Stellarise Connector	
Stellarise Connector	Xero Demo Company (UK) - Dynamics https://stellarisedev.api.crm4.dynamics.com GBP Enterprise Annual (£849.60 Inc VAT pa)
Invoice type	Sales Invoice
Line Amount Types	Exclusive
Branding Theme	Very orange Invoice!

Xero details	
Invoice ID	Xero invoice number ↑
test Enrico 1	INV-0044
Xero invoice ...	Xero in
Authorised	https://igo

SALES INFORMATION	
Opportunity	--
Order	--
Customer *	A. Datum Corporation (sample)
Description	ygtbebf

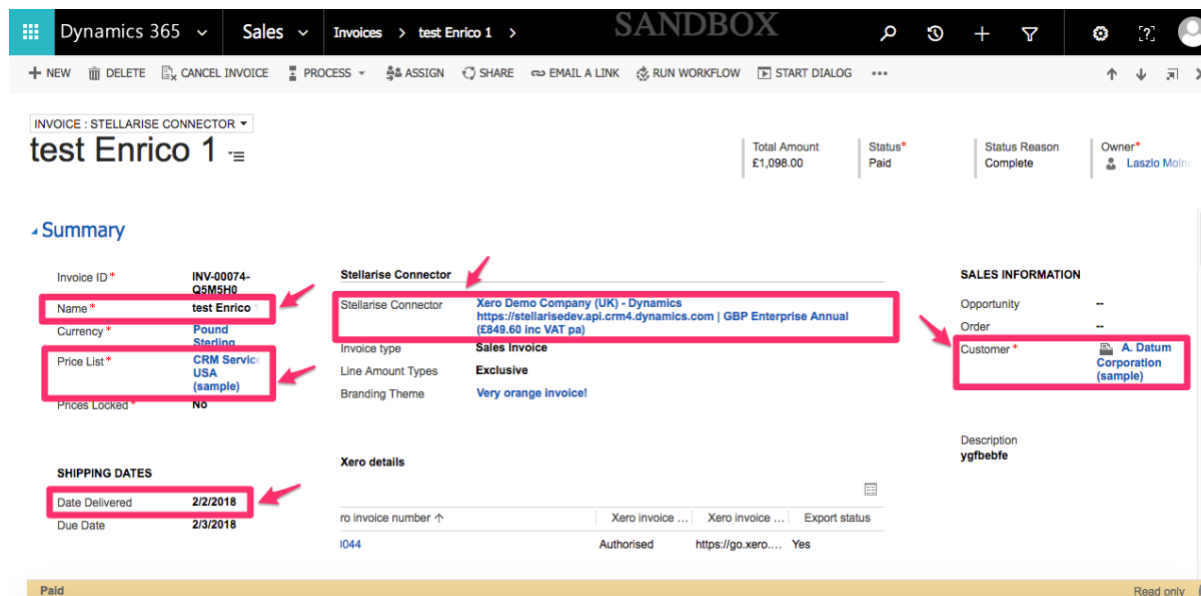
Invoice: test Enrico 1, Total Amount: £1,098.00, Status: Paid, Status Reason: Complete, Owner: Laszio Molnár

Read only

The Dynamics 365 Invoice

Mandatory Invoice fields to allow the Stellarise Connector to correctly synchronise invoices are:

- **Price List**
- **Data Delivered:** the invoice will be synchronised only if this date is today or before. Invoices in the future will not be synchronised until today is the specified date.
- **Customer:** can be Account or Contact
- **Product Lines**
- **Stellarise Connector:** set this only when you think that the invoice is ready to be synced.



The screenshot shows a Dynamics 365 invoice form for 'test Enrico 1'. The form is titled 'INVOICE : STELLARISE CONNECTOR' and includes a 'Summary' section. Key fields are highlighted with red boxes and arrows:

- Invoice ID:** INV-00074-Q5M5H0
- Name:** test Enrico
- Currency:** Pound Sterling
- Price List:** CRM Service: USA (sample)
- Prices Locked:** No
- Stellarise Connector:** Xero Demo Company (UK) - Dynamics (https://stellarisedev.api.crm4.dynamics.com | GBP Enterprise Annual (£849.60 Inc VAT pa))
- Invoice type:** Sales Invoice
- Line Amount Types:** Exclusive
- Branding Theme:** Very orange Invoice!
- SALES INFORMATION:** Customer: A. Datum Corporation (sample)
- SHIPPING DATES:** Date Delivered: 2/2/2018, Due Date: 2/3/2018
- Xero details:** ro invoice number: 1044, Xero invoice: Authorised, Xero invoice: https://go.xero...., Export status: Yes

The form also shows a 'Total Amount' of £1,098.00, 'Status' of Paid, 'Status Reason' of Complete, and 'Owner' of Laszlo Molnar. The bottom of the form indicates 'Paid' and 'Read only'.

PRODUCTS Highlights.

Stellarise Connector for Dynamics 365 and Xero also synchronises products. The way it does this, is described by the following:

All the Dynamics invoice lines are synchronised with Xero, carrying the Description, possible Product code, Quantity, Unit Price, Tax rate, Currency, Account Code.

Tax Rate and **Account Code** can be anyway overwritten per single Invoice Line in Dynamics, simply double clicking on the invoice line and selecting the account code and the tax type.

- If in Dynamics the product is a 'write-in' products, in Xero you will have an invoice line carrying a 'write-in' product as well.



- If in Dynamics the product is an 'existing' product, in Xero you will have a proper Xero Product Entity and the invoice line using the Product Entity itself.
- If in Dynamics the product is a 'write-in' having 0 (zero) amount and 0 (zero) quantity, then in Xero you will have an empty line just reporting the description, meant to be a Note or a comment.

Sync the invoice with Xero

Our connector is scheduled to run every 5 minutes. If there are invoices that need to be synced, we will download them and sync them with Xero. In case of success or error, the Stellarise Connector creates a 'Sync History' record against the invoice with the sync details. In case of error, Stellarise Connector prints the error reason as well.

Sync History table as shown below is reported in every Dynamics 365 Invoice entity.

Sync history

Event date and time ↓	Name	Action	Details	Sync s
2/2/2018 3:07 PM	Sync - 2018-02-02 15:07:52	Update	Invoice has been paid in Xero:	Successf
2/2/2018 3:06 PM	Sync - 2018-02-02 15:06:31	Update	Invoice status updated:	Successf
2/2/2018 2:57 PM	Sync - 2018-02-02 14:57:22	Create	Invoice has been created in Xero - 81f93ef2-a98f-47...	Successf

If the sync was successful, our connector will update the following fields:

Xero details

Invoice ID	Xero invoice number ↑	Xero invoice ...	Xero invoice ...	Export status	Export date
test Enrico 1	INV-0044	Authorised	https://go.xero....	Yes	2/2/2018 2:57 PM

1. **Invoice ID:** The Dynamics Invoice name.
2. **Xero Invoice Number:** The related invoice number in Xero.
3. **Xero Invoice Status:** Status of the Xero Invoice (draft, authorized etc.).
4. **Xero Invoice URL:** a clickable hyperlink that brings you straightforward to the Xero invoice.
5. **Export Status:** If sync was successful this field will be set to "Yes". If the sync process failed, this field will be set to "Failed". In both of cases you are able to see the Sync History in every Dynamics Invoice.
6. **Export Date:** The date when our connector last synced this invoice with Xero.



7. **Tax:** If a Tax Rate has been set against the Dynamics 365 Invoice Lines, our connector sends the Tax Rate to Xero, which will calculate the tax amount. Stellarise Connector will sync back this value to the Dynamics 365 Invoice.

Sync payments from Xero

Once an invoice is fully paid in Xero, our connector will sync back the changes and mark the invoice in Dynamics 365 as “Paid”.

Below, see at a Xero invoice example reporting ‘AMOUNT DUE’ to 0 (zero). This means that the invoice in Xero is fully paid.

You are using a demo of Xero. Set up your own business now with a free trial. [Add an organisation](#)

Demo Company (UK) En De

Dashboard Accounts Payroll Reports Adviser Contacts Settings

Sales > Invoices > Invoice INV-0044

Paid [Go to Stellarise Connect...](#) [Preview](#) [Email](#) [Print PDF](#) [Invoice Options](#)

To: **A. Datum Corporation (sample)** 2137 Birchwood Dr, Redmond, WA 98014, U.S. [Edit address](#)

Date: 2 Feb 2018 Due Date: 3 Feb 2018 Invoice #: INV-0044 Reference: ygfbebf6 Branding theme: Very orange invoice!

Total: 1,317.60

Amounts are Tax Exclusive

Item Code	Description	Quantity	Unit Price	Disc %	Account	Tax Rate	Region	Amount GBP
	Test line 1 Here are some stuff PRG123	3.00	300.00		Sales	20% (VAT on Income)		900.00
	This is just a great comment Something							
CRM Online: Enterprise (sample)	CRM Online: Enterprise (sample) 2 new user PRG123	2.00	99.00		Sales	20% (VAT on Income)		198.00
Subtotal								1,098.00
Total VAT 20%								219.60
TOTAL								1,317.60
Less Payment								1,317.60
AMOUNT DUE								0.00

In Dynamics you will see the following result:

Dynamics 365 Sales Invoices > test Enrico 1 > **SANDBOX**

+ NEW DELETE CANCEL INVOICE PROCESS ASSIGN SHARE EMAIL A LINK RUN WORKFLOW START DIALOG

INVOICE: STELLARISE CONNECTOR

test Enrico 1 Total Amount: £1,098.00 Status: Paid Status Reason: Complete Owner: Laszlo Molnar

Summary

Invoice ID: INV-00074-Q5M5H0
Name: test Enrico
Currency: Pound Sterling
Price List: CRM Service: USA (sample)
Prices Locked: No

SHIPPING DATES
Date Delivered: 2/2/2018
Due Date: 2/3/2018

Stellarise Connector
Stellarise Connector
Xero Demo Company (UK) - Dynamics
<https://stellarisedevapi.crm4.dynamics.com> | GBP Enterprise Annual (£849.60 inc VAT pa)
Invoice type: Sales Invoice
Line Amount Types: Exclusive
Branding Theme: Very orange invoice!

Xero details

Xero invoice ...	Xero invoice ...	Export status	Export date
Authorised	https://go.xero....	Yes	2/2/2018 2:57 PM

SALES INFORMATION
Opportunity: --
Order: --
Customer: A. Datum Corporation (sample)
Description: ygfbebf6

Paid Read only



Account and contact outstanding and overdue amount in Dynamics

We sync back the contact outstanding and overdue amount from Xero to Dynamics 365. This is available to view in the Stellarise Connector form for Dynamics 365 Contacts, viewable by selecting the Stellarise Account and Contact views in Dynamics 365.

CONTACT : DYNAMICS XERO CONNECTOR

Angel Mob

Owner
Laszlo Molnar

Summary

CONTACT INFORMATION

Full Name *	Angel Mob
Job Title	--
Account Name	Differ Limited
Email	am@differltd.co.uk
Business Phone	02035432456

Dynamics Xero Connector

Amount overdue	£0.00
Amount owed	£0.00

RECENT CASES

Case Title	Case Number
No Case records found.	

POSTS ACTIVITIES NOTES

ACCOUNT : DYNAMICS XERO CONNECTOR

Stolen Ltd.

Annual Revenue
£1,000,000.00

No. of Employees
--

Owner
Laszlo Molnar

Summary

ACCOUNT INFORMATION

Account Name *	Stolen Ltd.
Phone	--
Fax	--
Website	--
Parent Account	--
Ticker Symbol	--

Dynamics Xero Connector

Amount overdue	£648.00
Amount owed	£648.00

CONTACTS

Full Name ↑	Email
No Contact records found.	

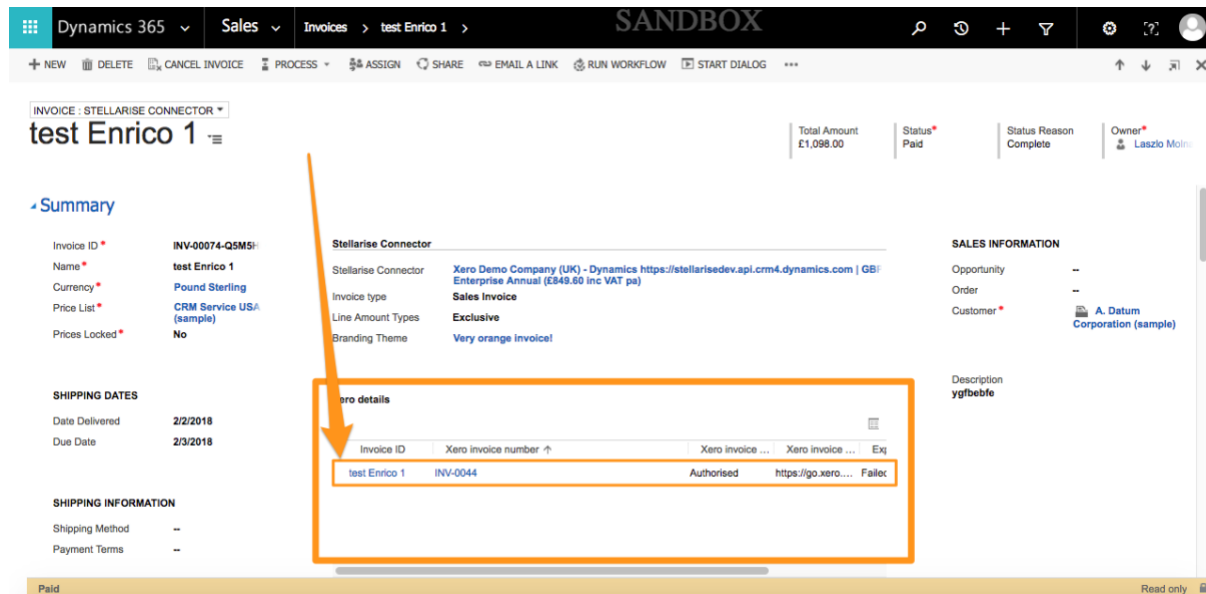
Enter post here

POST

All posts Auto posts User posts

How to troubleshoot Stellarise Connector for Dynamics 365 and Xero issues?

When the sync process fails on an invoice, the Xero export status will be set to “Failed” and a new “Sync History” item will be created against the Dynamics Invoice with the error details. If you can solve the problem on the invoice then you need to change the Xero export status from “Failed” to “No”, so our connector will pick it up on the next run and will try to sync again. To change the Export status, double click on the Dynamics table “Xero Details” and change as shown in picture:



INVOICE : STELLARISE CONNECTOR
test Enrico 1

Total Amount: £1,098.00 | Status: Paid | Status Reason: Complete | Owner: Laszlo Molnar

Summary

Invoice ID: INV-00074-Q5M5
Name: test Enrico 1
Currency: Pound Sterling
Price List: CRM Service US (sample)
Prices Locked: No

SHIPPING DATES
Date Delivered: 2/2/2018
Due Date: 2/3/2018

SHIPPING INFORMATION
Shipping Method: --
Payment Terms: --

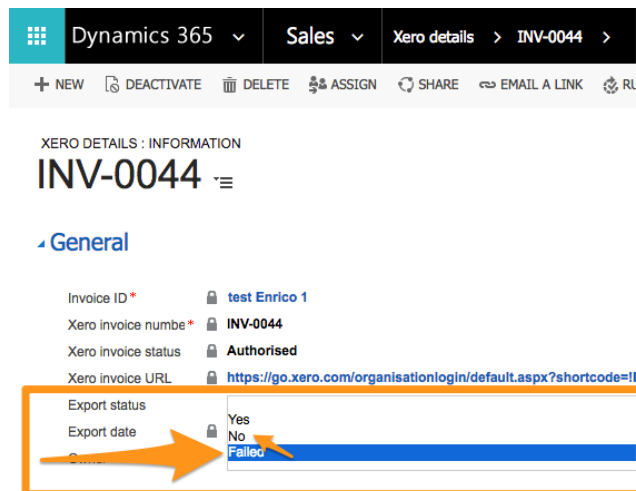
Stellarise Connector
Stellarise Connector: Xero Demo Company (UK) - Dynamics https://stellarisedev.api.crm4.dynamics.com | GB
Invoice type: Sales Invoice
Line Amount Types: Exclusive
Branding Theme: Very orange Invoice!

SALES INFORMATION
Opportunity: --
Order: --
Customer: A. Datum Corporation (sample)

Xero details

Invoice ID	Xero invoice number	Xero invoice ...	Xero invoice ...	Export status
test Enrico 1	INV-0044	Authorised	https://go.xero...	Failed

Paid | Read only



Dynamics 365 | **Sales** | **Xero details** | **INV-0044**

XERO DETAILS : INFORMATION
INV-0044

General

Invoice ID: test Enrico 1
Xero invoice number: INV-0044
Xero invoice status: Authorised
Xero invoice URL: https://go.xero.com/organisationlogin/default.aspx?shortcode=II

Export status: Yes
Export date: No
Failed

If you cannot solve the problem based on the error details in the Dynamics 365 “Sync History” record, you can contact us at servicedesk@stellarise.com, with your error details and we will assist you with the solution.