

Plug-N-Play Connector: Connect Dynamics 365 Accounts, Contacts, Invoices and Line Items to XERO.

XERO connector for Dynamics 365 Sales integrates invoices raised in Dynamics 365 to XERO. Dynamics 365 Accounts sync to XERO customers, Dynamics 365 Contacts sync to XERO contacts.

Both existing and write-in products are supported.

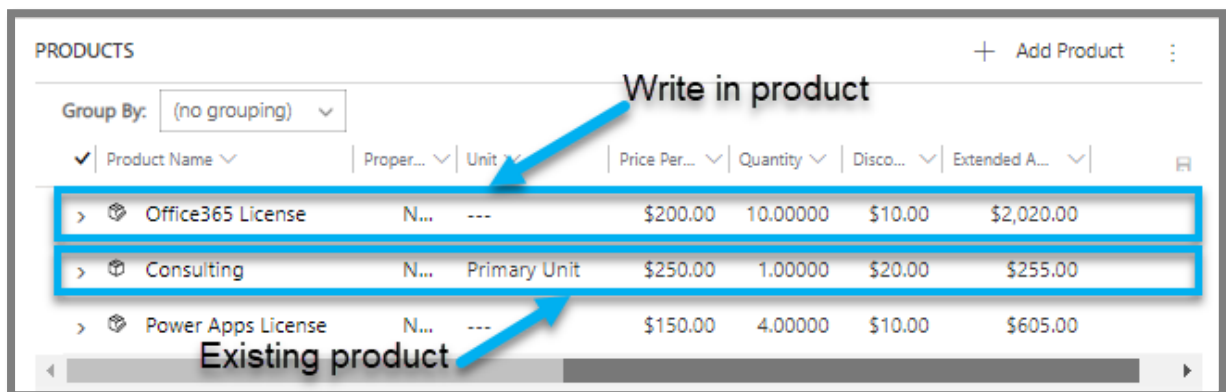
The connector looks for existing customers and contacts in XERO and if they do not exist then a new record is created in XERO and associated with invoice.

The Dynamics 365 invoices are marked completed when payments are allocated to XERO invoices.

Features

- **Increased efficiency** – With data being available both in Dynamics 365 and XERO, sales team doesn't have to worry about finance team and vice-versa.
- **No double entries** – With the status clearly visible in both Dynamics 365 and XERO and the systems being connected, there is no need for double data entry.
- **Better visibility** - Invoice history is available in both Dynamics 365 and Xero so that all users (with appropriate security roles) can access the information.
- **Readily available** – This is a plug-n-play connector so, you do not have to wait for it to be built for you to use.
- **Reduce expense** – With the connector being readily available, you do not have to hire a developer to build it and pay hefty build cost.

For more information, simply click "Contact me" above to get a demonstration.




The screenshot shows a table of products in Dynamics 365. The table has columns for Product Name, Proper..., Unit, Price Per..., Quantity, Disco..., and Extended A... The following table represents the data shown in the screenshot:

Product Name	Proper...	Unit	Price Per...	Quantity	Disco...	Extended A...
Office365 License	N...	---	\$200.00	10.00000	\$10.00	\$2,020.00
Consulting	N...	Primary Unit	\$250.00	1.00000	\$20.00	\$255.00
Power Apps License	N...	---	\$150.00	4.00000	\$10.00	\$605.00


Annotations in the image include:

- A blue arrow pointing to the 'Office365 License' row with the text "Write in product".
- A blue arrow pointing to the 'Power Apps License' row with the text "Existing product".

\$97,739.50 Total Amount
 Active Status
 New Status Reason
 Sid Bharadwaj Owner
 1 

Total Amount **\$97,739.50**

Status * **Active**

Status Reason 2 **New** 

New

Partially Shipped

Billed

Booked (applies to services)

Installed (applies to services)

Owner *

Customer 3 *

Sales overview

Invoices

[New Invoice](#)
 [New Credit Note](#)
 [Send Statements](#)
 [Import](#)
 [Export](#)
 [Invoice reminders off](#)

All
Draft (2)
Awaiting Approval (0)
Awaiting Payment (0)
Paid
Repeating

← Invoice Status

31 items [Search](#)

Number	Ref	To	Date	Due Date	Paid	Due	Status	Sent
INV-01008-INVWBVQ	This is a description	City Power & Light (sample)	19 May 2021	31 May 2021	12,178.13 AUD	0.00	Paid	
INV-0028	GB1-White	Bayside Club	15 May 2021	3 Jun 2021	0.00	234.00	Awaiting Payment	
INV-0027	Ref INV015	Maine Systems	15 May 2021	21 May 2021	0.00	398.00	Awaiting Payment	
INV-0028		Basket Case	15 May 2021	25 May 2021	0.00	914.56	Awaiting Payment	
INV-0030	Monthly support	Rex Media Group	14 May 2021	29 May 2021	0.00	550.00	Draft	
INV-0029	Monthly support	Hamilton Smith Ltd	14 May 2021	29 May 2021	0.00	550.00	Draft	
INV-0024	PIO 9711	City Limousines	10 May 2021	25 May 2021	0.00	703.63	Awaiting Payment	Sent



Dynamics 365 Table	Dynamics 365 Column	Direction of Integration	Xero Table	Xero Column
Account	Account Name	D365 to Xero	Contact	Contact Name
Account	Address 1: Street 1	D365 to Xero	Contact	Street 1
Account	Address 1: City	D365 to Xero	Contact	City/Town
Account	Address 1: State/Province	D365 to Xero	Contact	State/Region
Account	Address 1: ZIP/Postal Code	D365 to Xero	Contact	Postal/ZIP Code
Account	Address 1: Country	D365 to Xero	Contact	Country
Contact	Main Phone	D365 to Xero	Contact	Mobile Phone
Contact	First Name	D365 to Xero	Contact	First Name
Contact	Last Name	D365 to Xero	Contact	Last Name
Contact	Business Phone	D365 to Xero	Contact	Default Phone
Contact	Email	D365 to Xero	Contact	Email
Invoice	Customer	D365 to Xero	Invoice	To
Invoice	Due Date	D365 to Xero	Invoice	Due Date
Invoice	Description	D365 to Xero	Invoice	Reference
Invoice	Invoice ID	D365 to Xero	Invoice	Invoice Number
Invoice	Status Reason	Xero to D365	Invoice	Status
Invoice Product	Product Name	D365 to Xero	Invoice	Description
Invoice Product	Quantity	D365 to Xero	Invoice	Qty
Invoice Product	Price per Unit	D365 to Xero	Invoice	Unit Price
Invoice Product	Volume Discount	D365 to Xero	Invoice	Discount
Invoice Product	Amount	D365 to Xero	Invoice	Amount
Invoice Product	Tax	D365 to Xero	Invoice	Tax Amount
Invoice Product	Version Number	D365 to Xero	Invoice	Item Code