



Extension For Xero

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XERO EXTENSION FOR ZOHO CRM

Table of Contents

Table of Contents	1
Extension Header	2
Title Header	2
Key Features	2
Extension Working	2
Short Description	4
Website Link	5
Privacy Policy	5
Terms	5
End Note	5

Extension Header

Xero Extension for Zoho CRM

Title Header

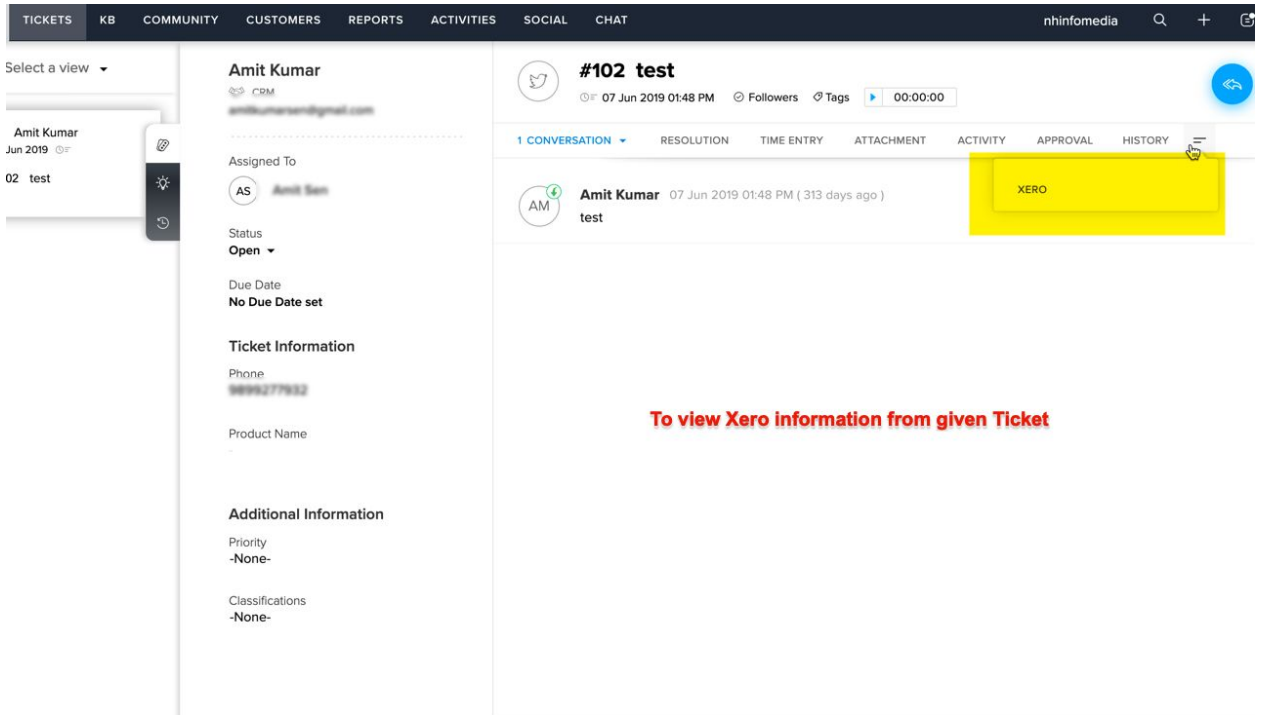
Manage Xero Accounting from Zoho Desk

Key Features

- View related Xero Invoice, bills & estimates within Zoho Desk tickets
- Create invoice In Xero from Zoho Desk
- Create estimates In Xero from Zoho Desk
- Create bills In Xero from Zoho Desk
- Change Xero invoice status from Zoho Desk
- View related Xero Invoice, bills & estimates within Zoho Desk customers

Extension Working

- While installing the extension authorize your Xero business account
- Once the extension is installed open any ticket to view Xero related information for that ticket . It will match the email between Zoho Desk and xero to bring in all the related information. After "History" tab click on the menu to enter the Xero section.



- If an email match is found, the user will be able to view all xero related information for this ticket inside Zoho Desk . Following information will be available ,
 1. Xero Contact Information
 2. Xero Invoice
 3. Xero Bills
 4. Xero Quotes

Further users will also be able to change the status of Invoice from Zoho Desk . Please note that only following status change are approved,

Existing Status	New Status
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DRAFT	DRAFT
DRAFT	SUBMITTED
DRAFT	AUTHORISED
DRAFT	DELETED
SUBMITTED	SUBMITTED
SUBMITTED	AUTHORISED
SUBMITTED	DRAFT
SUBMITTED	DELETED
AUTHORISED	AUTHORISED
AUTHORISED	VOIDED

- Similarly, the user will be able to view all xero related information for a given customer inside Zoho Desk if an email match is found between Zoho Desk customer & xero. Following information will be available ,
 1. Xero Contact Information
 2. Xero Invoice
 3. Xero Bills
 4. Xero Quotes

Short Description

“Xero Extension for Zoho Desk” enables users to create & view Xero Contact information, Invoice , Bills to Pay & Quotes from within the Zoho Desk account. Thus it evades all the manual process to switch between both accounts to view critical Xero information. If you are in the service industry you will like your Zoho Desk agents to empower with this unified platform so that they are not at the discretion of other departments to fetch decision making details. Waiting time to resolve tickets by agents will be humongously reduced by using this extension for cases where xero accounting information is pragmatic for making conclusive agent decisions.

Website Link

<https://www.easytocheck.com/Xero>

Privacy Policy

<https://www.easytocheck.com/privacy-policy>

Terms

<https://www.easytocheck.com/terms-and-conditions>

End Note

This extension is developed by “EasyTocheck Software Solutions” and for any further assistance and customization , users can directly get in touch with us (www.easytocheck.com). We will update the extension with new updates which will be available to all existing customers at no extra cost. Publishing or copying the extension partially or contextually is strictly prohibited as the company holds the proprietorship for developing this connector which includes logic & integration workflow