

**SUBJECT:**

Marine Tech Xero Integration

DATE:

22nd October 2020

FROM:

Dan Mann

Hi Danny,

Some great news today, after a few days of testing various plugins, APIs and Apps - we finally found systems that work together.

In Brief:

The target was to create a system which allows WooCommerce to pull stock levels from Xero. It would also be handy to allow eBay to pull the stock levels from Xero. So, all three marketplaces would need read and write from each other.

I can confirm **we can** achieve the following:

- Sync inventory levels from Xero to WooCommerce via SKU – both variable and simple products.
- Sync inventory levels from Xero to eBay.
- Reduce inventory levels from all marketplaces when an invoice or order is created from either marketplace.
- Increase inventory levels on all marketplaces via a CSV or purchase order (bill).
- Allow separate pricing on all marketplaces where necessary

How does this work?

To achieve the above, it is essential Xero is used to control stock levels as the master inventory file, and the eBay or WooCommerce stock levels are not adjusted. Any adjustments made to these other marketplaces will result in their stock levels being overwritten by Xero.

Secondly, all marketplaces must have the same SKU for the products required to be synchronised. For this reason, it's essential we create a master file for use on all marketplaces to ensure this works.

I understand on eBay we can use selling manager to change the SKUs should they not be optimal. Alternatively, we can export eBay's current SKUs to use for all other marketplaces.

Finally, when an order is created in either eBay or WooCommerce, it will create an invoice in Xero. Xero then automatically reads this file and reduces the stock.

This information is synced every 60 minutes, but is stored as a log in case of errors or connection failures.

Accounting System

As we are now using automatically created invoices to reduce stock, we may as well set up the system to automatically calculate their income, VAT etc. (as Xero is supposed to be used).

For this reason, we will need to speak to Marine Tech's accountant to correctly set up dedicated areas for the following to be assigned to:

- Online Stripe Payments,
- eBay Invoices,
- WooCommerce Invoices,
- Cost of Goods Sold Account.

The accountant will have a much better idea how they need to calculate income and expenses, and may want to use PayPal, possibly a Royal Mail account (which is a bolt on integration).

As an example, I have attached a screenshot of the info it is asking for, prefilled with my own test data.

WooCommerce - Marine Tech ↔ Xero - Marine Tech

☐ When an **Order** is created in **WooCommerce**, create an **Invoice** in **Xero**

☒ When a **Product** is created in **WooCommerce**, create a new **Item** in **Xero**

Use Income Account ? 200 - Sales

Use Expense Account ? 310 - Cost of Goods Sold

Create Inventoried Items as ? Non-Inventoried Items Inventoried Items

Use Income Account for Inventoried Items ? 1000 - Wordpress Sale

Use COGS Account for Inventoried Items ? 310 - Cost of Goods Sold

Use Inventory Asset Account for Inventoried Items ? 630 - Inventory

Save Cancel

WooCommerce

Xero

WooCommerce - Marine Tech

Xero - Marine Tech

☒ When an **Order** is created in **WooCommerce**, create an **Invoice** in **Xero**

Retrieve Orders from WooCommerce

Retrieve Orders with Status

☐ Cancelled
☐ Failed
☐ On hold
☒ Processing

☒ Completed
☐ Invoice
☒ Pending payment
☒ Refunded

[Default Products and Advanced Options](#)

☐ Credit note is created in Xero

Map Tax Codes

Map Sale Tax Codes

WooCommerce	Xero
No Tax [0.00%]	NONE - NONE No VAT [0.00%]
vat [20.00%]	Tax - Tax [20.00%]

☒ Create New Items in Xero

Use Income Account ?

1000 - Wordpress Sale

Use Expense Account ?

310 - Cost of Goods Sold

Create Inventoried Items as ?

Non-Inventoried Items

Inventoried Items

Use Income Account for Inventoried Items ?

1000 - Wordpress Sale

Use COGS Account for Inventoried Items ?

310 - Cost of Goods Sold

Use Inventory Asset Account for Inventoried Items ?

630 - Inventory

☒ Send Payments from WooCommerce to Xero

Deposit Payments into Account ?

Wordpress

Handle Overpayments

Yes

No

Map Payment Methods

WooCommerce	Xero
Cash	
Credit Card (Stripe)	

Filters

Edit Filters

You have no filters defined.

Save

Cancel

Conclusion

Due to the Xero account and apps being on a trial basis, there are only a few days left to do any further testing needed.

I have vigorously tested the system, and so far, there are no failures. This will do what is needed, and more.

Royal Mail Integration I think will make this system even more slick, and obviously we can use Mail Chimp to pull all customer details from Xero. (All customers detail from WooCommerce and eBay will be stored in Xero, so it's a great source for email campaigns).

Finally, we can always choose what needs to be synced and any products or invoices created in Xero won't affect the system either. However, I do expect Marine Tech will need us on occasions to update the system, help with/creating new products to be synced.

Please let me know if Daniel has any questions on this system, and I will be happy to help where I can.



Dan Mann

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P.S – The website is looking very dry at the moment to speed up testing, but I can revert it back in a few days should they want to play with Wordpress.