

Transferring Invoices to Xero

Open you entry form, and take **Entries > Send to Xero** from the menu

This screen will show all the entries that haven't been transferred yet.
First up you click on [**Connect to Xero**]

This step will take you to the Xero website, where you need to login, and will give EnterNOW 30mins access to transfer invoices to Xero

EnterNOW Demo Event

Overview Todo List **Entries ▾** Results Reports Settings ▾ System ▾ Help

Send to Xero

Connect to Xero

<input type="checkbox"/> Ref	Contact/Team	Phone/Event	Status
<input type="checkbox"/> E26516	alex ryder	testing	PAID
T25406	alex ryder	Guys Open (13-44yrs) - 10km	

Once you have connected, you will be back on the Send to Xero screen.
At the top you can select the Account Code you want to use, and the due date.

If this is your first time, we suggest just ticking 1 invoice to transfer, otherwise, you can tick the box at the top and it will select the whole lot.

When you are ready click on the [Send to Xero] button, and you will see it start sending the invoices to xero. You need to leave this screen open until it has finished sending.

Send to Xero

Send to Xero (2)

200 - Sales ▾

3-Mar-2017

<input type="checkbox"/> Ref	Contact/Team	Phone/Event	Status	Total	Outst
<input checked="" type="checkbox"/> E26516	alex ryder	testing	PAID	\$2.00	
T25406	alex ryder	Guys Open (13-44yrs) - 10km			
<input checked="" type="checkbox"/> E26593	alex ryder	0210787328	PAID	\$2.00	
T25558	alex ryder	Guys Open (13-44yrs) - 10km			

Once it has finished, you can go into Xero and you will find your invoices under **Accounts > Sales > Draft Invoices**

You will need to check each invoice and approve it



DashboardAccountsPayrollReportsAdviserContactsSettings

Sales >Invoices

New InvoiceNew Credit NoteSend StatementsImportExportInvoice reminders off

AllDraft (27)Awaiting Approval (0)Awaiting Payment (9)PaidRepeating

Submit for approvalApproveDeletePrintEmailCopy to...No items selected27 items | 31,756.00 NZDSearch

	Number	Ref	To	Date	Due Date	Due
<input type="checkbox"/>	INV-0064	E26516	 alex ryder	2 Oct 2014	3 Mar 2017	2.00
<input type="checkbox"/>	INV-0065	E26593	 alex ryder	6 Oct 2014	3 Mar 2017	2.00

Revision #2

Created 24 July 2020 05:48:24 by Alex

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