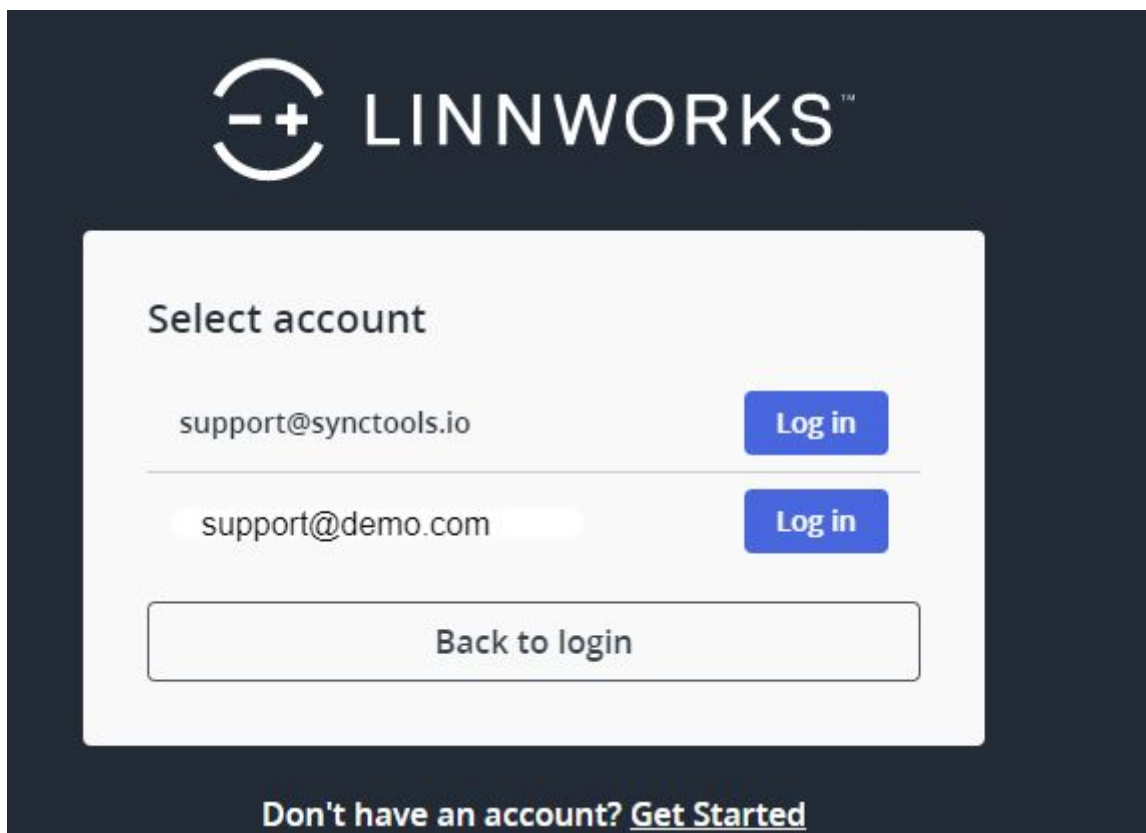


SyncTools	1
Steps to install SyncTools app -	2
Open and Log in to Linnworks	2
Click on Application > Application store	2
Search for xero connector	2
Click on the Read More button of Xero connector tool	3
Make sure the developer name is SyncTools.io and click on install button	3
Accept Third Party Integrations Disclaimer	4
Click on the Next button	4
Click on the Install button	4
You will get a confirmation email, click on the confirmation link	4
User Information (Username + Password) will be sent	5
Log in to the SyncTools -	6
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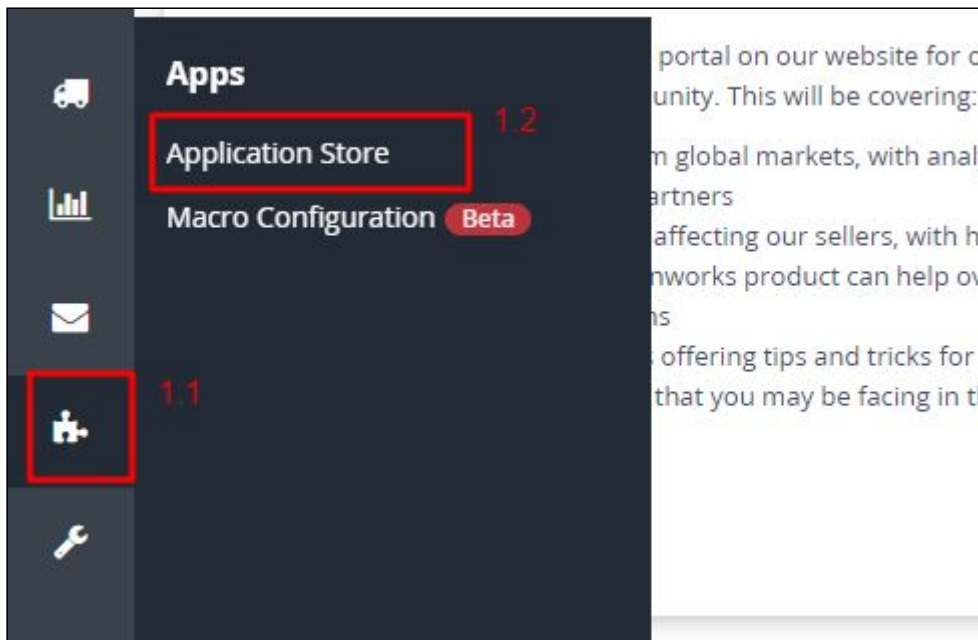
SyncTools

- Direct Sign up from the website is not available. So the user must install it from the Linnworks app store.
- All the emails (Confirmation + User information) will be sent to the **email which is registered in the Linnworks account**. If Linnworks email is of another team member, you will need them to forward two emails to you.
- Please select the **Linnworks account from which** you want to sync the orders.

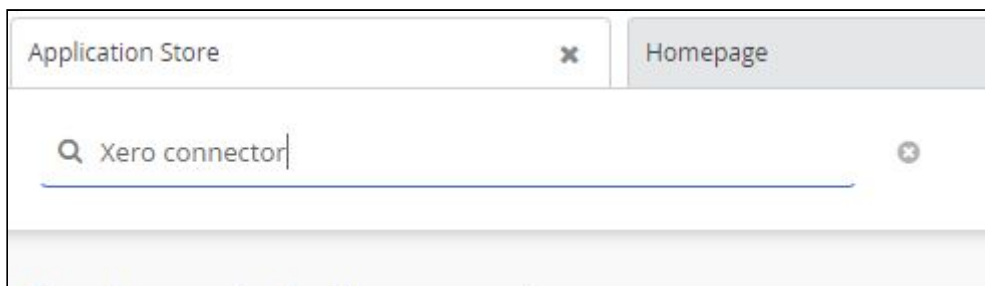


Steps to install SyncTools app - (You can refer to this [Video](#))

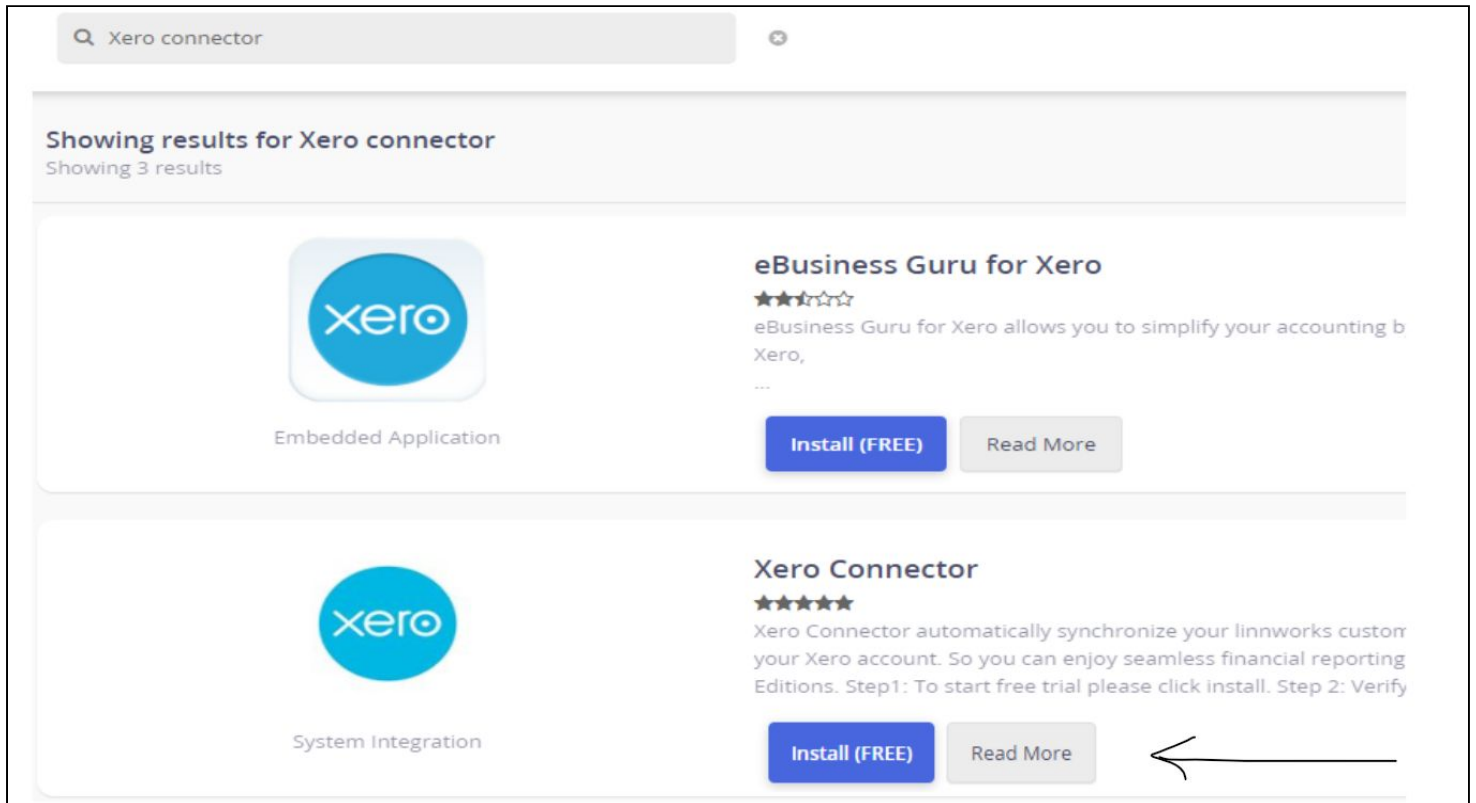
1. Open and Log in to Linnworks
2. Click on Application > Application store



3. Search for xero connector



4. Click on the Read More button of Xero connector tool

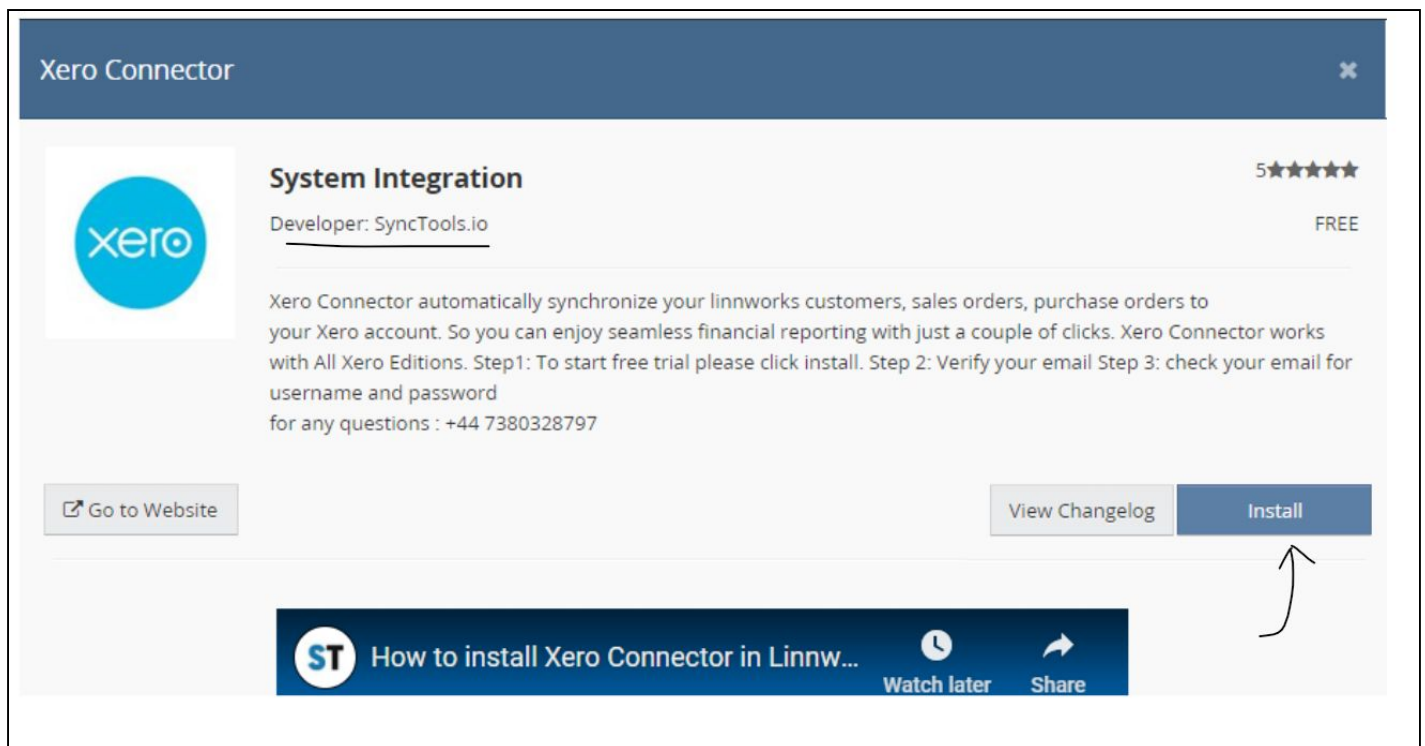


Showing results for Xero connector
Showing 3 results

eBusiness Guru for Xero
★★★★☆
eBusiness Guru for Xero allows you to simplify your accounting b Xero,
...
Install (FREE) Read More

Xero Connector
★★★★★
Xero Connector automatically synchronize your linnworks custom your Xero account. So you can enjoy seamless financial reporting Editions. Step1: To start free trial please click install. Step 2: Verify
Install (FREE) Read More ←

5. Make sure the developer name is SyncTools.io and click on install button



Xero Connector

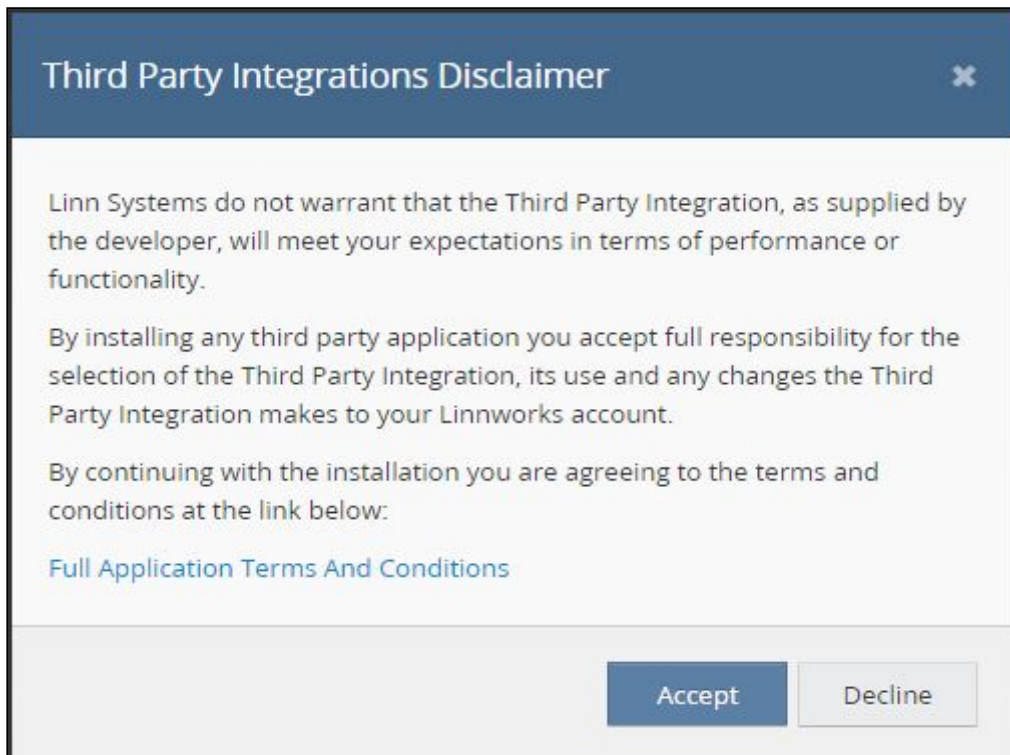
System Integration 5★★★★★
Developer: SyncTools.io FREE

Xero Connector automatically synchronize your linnworks customers, sales orders, purchase orders to your Xero account. So you can enjoy seamless financial reporting with just a couple of clicks. Xero Connector works with All Xero Editions. Step1: To start free trial please click install. Step 2: Verify your email Step 3: check your email for username and password
for any questions : +44 7380328797

Go to Website View Changelog **Install** ↑

ST How to install Xero Connector in Linnw... Watch later Share

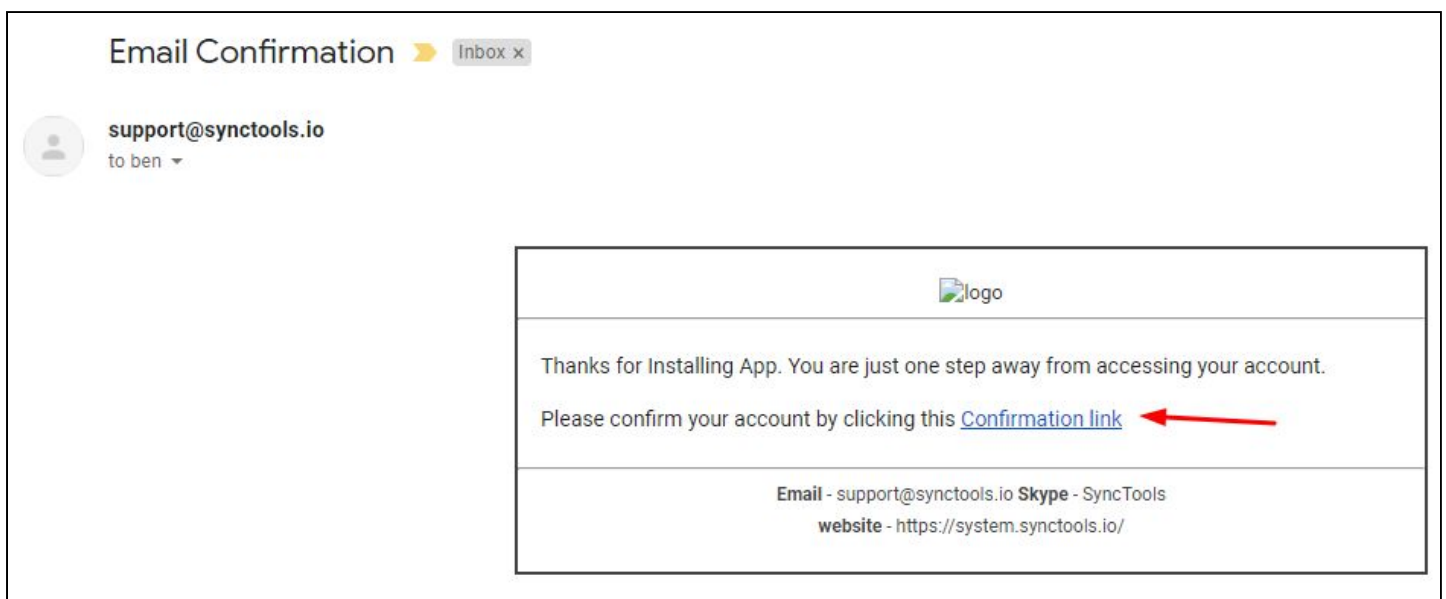
6. Accept Third Party Integrations Disclaimer



7. Click on the **Next** button


8. Click on the **Install** button

9. You will get a confirmation email, click on the confirmation link



10. User Information (Username + Password) will be sent

User Information Inbox x

 **support@synctools.io**
to ben ▾

Thanks for installing our application from Linnworks Please use your creadintials as follow:
UserName : [ben@](#)
Password : EIBw3G5q1#

Login with <https://system.synctools.io/> and configure your account.

Sync Tools
Email: support@synctools.io
Web: <https://system.synctools.io/>
A solutions partner you can count on.

Log in to the SyncTools -

1. Use the credentials sent by SyncTools to Login
2. This is the link for SyncTools system: <https://system.synctools.io/>
3. Or you can go to <https://synctools.io/> and click on Login button

Configuration and setting up the SyncTools account -

- ❖ Use this [PPT](#) for better understanding
- If any support is needed, you can send an email to support@synctools.io or you can call us on +44 7380328797

Steps:

- Select the plan as per order volume
- Set up the profile so that SyncTools team can reach to you faster
- Click on Settings > Connections
- Click on the Xero icon and connect your Xero account.
- Make sure the button on the rightest side is at OFF. (It is for automatic sync)
- First You should test a few orders manually so that we can prevent back and forth.
- Click on the Configuration button

Module 1 - Add accounts to Xero

- It suggests if any new chart of account should be created or not, in most cases this module is ignorable as users already have their Xero set up.
- Save and Continue

Module 2 - Item configuration

- Select **Default sales account** in which the sales will be booked
- Select **Default purchase account** in which the purchase will be booked. (Ignorable if you are not syncing purchase orders from Linnworks)
- Select **Default shipping account** in which the shipping amounts will be booked

- Enable description only item creation:
 - ❖ Keep it **OFF** if you want to sync **SKU codes** of the line items
 - ❖ Keep it **ON** if you do not need to sync **SKU codes** of the line items
- Save and Continue

Module 3 - Item configuration

- **Sync Sales orders**
 - ❖ Make it ON so that Linnworks can be synced as Xero invoice
- **Sync Zero amount orders -**
 - ❖ Keep it OFF if you do not want to sync orders with total amount 0.
 - ❖ Keep it ON if you want to sync orders with total amount 0.
- **Xero invoice status should be -**
 - ❖ Ignorable if you are only syncing PAID orders.
 - ❖ If you are syncing UNPAID orders too, you can select what should be the invoice status of the UNPAID orders - 1) Awaiting payments
2) Awaiting approval 3) Drafts
 - ❖ This setting will affect UNPAID orders only, All the PAID orders will be created as PAID invoices.
- **Use xero generated invoice number**
 - ❖ Keep it OFF if you want Xero invoice number same as Linnworks order ID. [advised]
 - ❖ Keep it ON if you want Xero to generate the invoice number
- **Which type of linnworks orders do you want to sync?**
 - ❖ Check the orders which you want to sync - 1) PAID orders
2) UNPAID orders 3) PENDING orders
- **Invoice date should be??**
 - ❖ Select Received date if you want Invoice with the date on which order was received.
 - ❖ Select Processed date if you want Invoice with the date on which order was processed.
- **Which type of linnworks order status, do you want to sync?**

- ❖ Select Processed only if you want to sync orders which are Processed in Linnworks.
- ❖ Select Open only if you want to sync orders which are in Open status in Linnworks.
- ❖ It can not be both. As duplication may occur. (we sync order which is Open and then again the same order is synced when it is processed)
- **How would you like to create customers in xero ?**
 - ❖ Select **Use linnworks order customer name+billing address to create customer in xero** if you want to sync every individual order as an invoice.
 - ❖ All other options are for grouped orders as per the grouping settings. it is advised that you include the SyncTools team while configuring the grouping feature as that will help prevent back and forth in any confusion.
- **Please map xero invoice reference number field with Linnworks sales order**
 - ❖ Select **Reference number** if you want **Linnworks order reference** as **Xero invoice reference number**. (Most preferred)
 - ❖ Select **Order number** if you want **Linnworks orderID** as **Xero invoice reference number**. (Most preferred)
 - ❖ Select **External reference** if you want **External reference of Linnworks order** as **Xero invoice reference number**.
 - ❖ Select **Secondary Reference (Channel reference)** if you want **Channel reference number of Linnworks order** as **Xero invoice reference number**.
- **Sync sales orders for selected channel only**
 - ❖ If you want to sync orders from certain channels only, you can use this filter. Same if you do not want to sync orders from certain channels.
 - ❖ Also, if you want to use it for channel tracking in Xero for a sales channel, it can be used.
- **Enable sales order filter by custom source**

- ❖ if you are importing orders in Linnworks under custom subsource (for example 3rd party point of sale system), then this feature will be useful to map the custom source and subsource with xero tracking category.
- **Enable grouping of sales order**
 - ❖ This is a useful feature for users with monthly orders more than 7000.
 - ❖ It helps you create one invoice for every channel with summarized total, tax and order count.
 - ❖ Same for subsource and country wise.
 - ❖ It is advised, users should contact the support team before setting up grouping features as that will help stop the back and forth under any wrong settings.
 - ❖ Save and Continue

Module 4 - Purchase configuration

- **Is the customer number ignored.**
 - ❖ It should be ON for every user.
- **How would you like to sync linnworks purchase order ?**
 - ❖ Do you want to sync Linnworks purchase orders - If no, Please select off.
 - ❖ If yes, Select Purchase Order if It should be created as Purchase order in Xero and Select Bill if It should be created as Bill in Xero.
 - ❖ Only DELIVERED Purchase orders from Linnworks will be synced.
- **Select Sync Status**
 - ❖ If you are syncing Purchase orders, you can select what should be the invoice status of the created Purchase orders/ Bills - 1) Drafts
2)Awaiting approval 3) Awaiting payments
- **Default discount account**
 - ❖ Please select the account in which discounts should be mapped if any.
 - ❖ Save and Continue

Module 5 -

- **Create payment for invoice**
 - ❖ Turn it OFF, if you do not want to sync payments of Linnworks orders, All the invoices will be created UNPAID without any payment.
 - ❖ Turn if ON, if you want to sync payments of Linnworks orders, All the paid orders will be created as PAID invoices with payment amount, date and reference number.
- **Payment method mapping.**
 - ❖ Select the chart of accounts in front of Linnworks payment methods.
 - ❖ Every payment from Linnworks will be mapped in the Xero chart of the account which is mapped with that payment method.
 - ❖ Please contact the support team if there is any confusion, so that we can prevent the back and forth.
- **Channel wise payment reference number configuration**
 - ❖ Please select what should be the payment reference number of the payment if you want to sync payments too.
 - ❖ Select the date for which payment should be made.
 - ❖ Select Received date if you want payment created on the date order was received in Linnworks.
 - ❖ Select Processed date if you want payment created on the date order was processed in Linnworks.
 - ❖ Save and Continue

Module 6 -

- **Default sales order tax**
 - ❖ Please select what should be the default [Taxable and NonTaxable] tax rate on all the orders. (if all the orders should have one same tax rate)
 - ❖ Please click on the advance tax setting if you have more than one tax rate to work with.
- **Advance Tax setting**
 - ❖ Please involve SyncTools support team while setting up the Advance tax setting if any doubts.

- ❖ You can refer to PPT attached under **Configuration and setting up the SyncTools account** section of this document for better understanding.

- **Default purchase order tax**
 - ❖ Please select what should be the default [Taxable and NonTaxable] tax rate on all the Purchase orders.
 - ❖ We do not have advance tax settings for Purchase orders if you have more than one tax rate to work with.
 - ❖ Save and Continue

Module 7 -

- **Pick a date from which you would like to start sync**
 - ❖ SyncTools will download all the orders from the selected date in Linnworks.
 - ❖ **SAVE**

***Configuration settings will be saved only if the Save button of Module 7 is clicked before closing the pop up.**

Testing of few orders

- Make sure the button on the rightest side is at OFF. (It is for automatic sync)
- First You should test a few orders manually so that we can prevent back and forth.
- Go to Sync Log
- Click on the Download button
- Select Sales so that sales order can be downloaded
- Once orders are downloaded, click on the Show button under the Sync History column.
- Click on Retry Upload.
- Order will be Uploaded and you will get the link of created Xero invoice under ToRecord # Column, click on that.
- Review the Invoice and compare with Linnworks order.
- If everything looks fine, Please go to settings > Connections and click ON the automatic sync button.

- Automatic sync will start in some minutes.
- If any problem or doubt is occurred, please contact the SyncTools support team.

Sync Report Email

- Everyday you will receive a sync report email which will include
 - ★ Total orders downloaded
 - ★ Total orders uploaded
 - ★ Total orders not uploaded (If any) - with error description
- If you want to receive such email on any other email address than the registered email address - Please go to settings > Email notification and add the email address.

Data flow diagram

Sales orders		Xero invoices
Order no.	→	Invoice no.
Reference no.	→	Invoice reference no. in Xero
Shipping/ Billing address	→	Contact info
Customer information	→	Contact info
Line items	→	Line items
Unit price	→	Unit price
Tax rate	→	Tax rate
Shipping total	→	Linetime - Shipping as service
Total amount	→	[Subtotal + Total VAT] = Total amount
Order payment status paid	→	Invoice payment status paid
Order payment status unpaid	→	Invoice payment status - [Draft/ Awaiting payment/ Awaiting approval]
SKU codes of products	→	Item codes (* If needed)
Source - Subsource	→	Xero tracking category

Leave a review

Once you have used system for a month or two, please leave a review for us in Linnworks,

1. Linnworks > Apps > Application store > Search Xero Connector > Click on the manage button of our Xero connector > Scroll down and you'll see the review section
2. Refer this **video**

FAQs

- Do you sync inventory?
 - ❖ SyncTools helps with Sales orders and Purchase orders. We do not specifically sync inventory as and when it changes. Though if item code/SKU sync is kept on, Inventory in Xero will be affected when Sales order includes that SKU.
- How do you manage Resends/ Refund?
 - ❖ Due to the volume not being huge, We do not have an option as of now for Resends/ Refunds. That users have to handle manually.
- How Long Does It Take To Get Setup & To Start Syncing?
 - ❖ The Full Process Normally Takes 15-30 Minutes In Order To Get Your Account Syncing.
- Do You charge for onboarding?
 - ❖ OnBoarding is totally free for SyncTools.io
- Do You Store My Credit Card Information?
 - ❖ Absolutely Not! Your credit card information is stored on our service providers (Authorize.Net) server which is tested hourly for possible breaches. Also your information is ALWAYS in compliance with PCI.
- Is There A Contract With SyncTools?
 - ❖ No. You can cancel and restart your plan as many times as you wish by simply logging into your system portal and cancelling or subscribing to a plan.

- Once My Account Is Setup; How Long Does It Take For My Data To Transfer? (i.e. Sales Orders, Purchase Orders)
 - ❖ We normally suggest giving the system 1 hour to sync 10,000 items. However in most cases it will be complete within 15 minutes. This time may also be affected during our peak times on the server.

SyncTools team Contact details

- Email - support@synctools.io
- Telephone - +44 7380328797
- Skype - [live:cid.21eba37b835e3ed6](skype:live:cid.21eba37b835e3ed6)