Guide for Syncing Expenses between Perfex CRM and Xero

Welcome to the expense syncing feature! This guide will help you understand how to use the module for syncing expenses between Perfex CRM and Xero, ensuring your financial records are accurate and up-to-date.

1. Syncing Expenses from Perfex CRM to Xero

To automatically send your Perfex CRM expenses to Xero as bills, follow these steps:

1. **Set Up the Integration**:
    - Make sure that your Xero account is connected to Perfex CRM through the integration settings.
    - Ensure you have provided the correct Xero tenant ID and access token in the settings.
2. **Expense Sync Process**:
    - Expenses added in Perfex CRM will be periodically synced to Xero as bills.
    - If an expense is successfully synced, a Xero ID will be attached to it in Perfex CRM.
3. **Checking the Status**:
    - Navigate to the expense list in Perfex CRM. Synced expenses will display a Xero ID, confirming that they have been successfully added to Xero.
    - You can manually sync any expense that hasn't been synced yet by selecting it and clicking "Sync to Xero."

2. Syncing Bills from Xero to Perfex CRM

To ensure that your Xero bills are also reflected in Perfex CRM as expenses:

1. **Scheduled Sync**:
    - The module automatically fetches new bills from Xero every 30 minutes and adds them to Perfex CRM as expenses.
    - Only bills that do not already exist in Perfex CRM will be added.
2. **Reviewing Imported Expenses**:
    - Newly imported bills from Xero will appear in the expenses list in Perfex CRM.
    - You can edit the details of these expenses directly in Perfex CRM to add notes or make adjustments as needed.

3. Managing Errors

If any issues occur during the syncing process:

- You may see an error message in the expense record. This usually indicates a problem with the data, such as missing fields or incorrect account codes.

- Make sure that all expenses have complete details before syncing.

4. Manual Sync Option

If an expense did not automatically sync:

- Navigate to the specific expense in Perfex CRM.
- Click the "Sync to Xero" button to attempt a manual sync.

5. Viewing Synced Records

- To verify which expenses have been successfully synced to Xero, check the "Xero ID" column in the expense list. If an expense has been synced, it will display the corresponding Xero Invoice ID.

Common Questions

Q: What happens if an expense is updated in Perfex CRM?
A: Any updates to expenses in Perfex CRM will need to be manually synced again to reflect the changes in Xero.

Q: Can I sync past expenses?
A: Yes, you can manually sync any past expenses by selecting them and clicking "Sync to Xero."