

# INTEGRATING SALESFORCE WITH XERO



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Integrating any Accounting package with Salesforce can be easily achieved using 3rd Party Apps which offer a variety of methods to achieve a business's goals. However, the key is knowing which one will work for a business which requires an understanding of the business's internal processes, the data structure that will be in place inside Salesforce and the functionality required of the App to marry these with the Accounting Package.



The good news is that integrating Salesforce with Xero is one of the most common and flexible accounting integrations available, unsurprisingly because both platforms were built with the concept of open integration.

## Functional Considerations

- 1 When/how in the sales process are invoices generated
- 2 Are there multiple invoices per sales/opportunity
- 3 Are products/inventory stored in Xero
- 4 Can sales be made when inventory is out of stock
- 5 Are purchase order numbers required



# There are 3 core methods of integrating Salesforce with Xero:

## Options 1 & 2

are AppExchange and 3rd party integration apps which can offer a very cost effective method. However, that doesn't mean they will meet a business's functional requirements. Additionally, those that offer flexibility in functionality can incur much higher subscriptions.

## Examples of common questions that need to be considered.

- 1 Most apps offer one workflow solution; what is the business's workflow/functional requirements
- 2 Most apps treat one opportunity as one invoice in the accounting software.  
Does the business have:
  - a) Multiple invoices per invoice
  - b) Recurring / subscription invoicing
- 3 Working with Xero - some configurations won't sync product data

## AppExchange and 3rd Party Apps

### AppExchange

<b>BREADWINNER PRICING</b>	\$99/month - \$299/month (USD) +~\$1/invoice
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*Arguably one of the most comprehensive integrations, this comes with a price tag to match.*

<b>INVOICE THIS PRICING</b>	\$89/Month (USD)
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### 3rd Party Apps

<b>ONESAAS PRICING</b>	\$28 - \$99/Month (AUD)
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<b>ZAPIER PRICING</b>	\$0 - \$125/Month (AUD)
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<b>WORKATO PRICING</b>	\$0 - \$499/month (AUD)
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### Option 3

#### Custom Integration

With Salesforce Enterprise Edition it is possible to create a custom Salesforce to Xero integration built to meet your business's exact workflow / process requirements.

#### Pricing

Custom integrations for Salesforce and MYOB range from AUD\$3500 - \$10000 +GST depending on the business requirements.

## Making the right choice

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The above options are not only functionally different; they also offer different pricing considerations. You have a choice between monthly subscriptions with lower implementation costs but ongoing financial commitments or higher implementation costs with no ongoing subscription costs. Both options might incur future maintenance costs.

Deciding on the correct solution takes time; one must consider all factors. It's important to document and understand the business's requirements and then match these against the available options. Invoicing correctly has a huge impact on a business; making the wrong decision could be costly, and needs to be considered properly.

Resonant Cloud Solutions is available for consulting on which would be the best solution for each business to aid in finding and implementing the correct functionality.

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