

Xero Integration



open CRM

Bridging the gap between Sales and Accounts.

Does it ever feel like the communication lines between your sales team and your accounts department are non-existent? Your sales team lives in your CRM system and your accounts team spend most of their day sitting in Xero. Ensuring that the two systems (and the two teams) keep each other updated can be difficult.

A steady flow of information

With OpenCRM's Xero Integration, you can be sure that the information in the two systems match, down to the product account codes, and that both of your teams have the information they need to stay on track.

OpenCRM to Xero

When your sales team raises an Invoice in OpenCRM, your accounts team can quickly identify these and push them through to Xero, with just a single click.

When OpenCRM sends a new Invoice to Xero, it is linked to the matching contacts and products. Or, if the contact or product do not exist in Xero, they will be created.

Xero to OpenCRM

Once a payment has been recorded against an invoice in Xero, one more button click and the change will then be sent across to OpenCRM. There the Invoice status and Company balance will be updated.





A place to meet in the middle

Your accounts team won't have to request any information from sales, they will be confident that they have all the information they require to get through their to-do list. Any questions and they can use the Quick Link option to go straight from the contact record in Xero to the Company record in OpenCRM.

Your sales team will know that when they view a customer's record, the invoice status and outstanding balances are accurate and up-to-date.

Never again will someone accidentally raise a new sales order against a customer in breach of your credit control processes, because your OpenCRM system will have the most up-to-date information about who has paid which invoice.



Giving you the lift you need

Stop worrying about trying to work out who has paid, who still owes, or whether or not it is safe to send out a new sales order.

With our Xero Integration, you can be sure that your OpenCRM system and Xero are in sync, reflecting the most accurate status of your finances.

Once you've got your sales and accounts teams working in harmony, nothing will keep your business from reaching its potential.



Most of our customers (80%) use the default field mapping. However, the remaining 20% may require some minor adjustments when mapping fields from OpenCRM to Xero. Let's chat about any specific requirements to ensure seamless integration that meets your needs.

Let your Sales and
Accounts teams soar
above the rest with

open crm

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