



Uploading Invoices in Xero

Readme

Version 1.0

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1. Introduction

This document contains all the necessary information for the functioning of the Uploading Invoices in Xero Bot.

1.1 Overview

This bot takes file containing all the Invoice Details in CSV format (adhering to the Xero template) and uploads it in your Xero Account.

The bot automatically logs in to Xero Account and does the uploading.

1.2 Common Use cases

This bot is mainly used when you need to periodically add Invoices in your Xero Account.

You can have a common folder where you put your CSV file containing your Invoice Details weekly. And all you need to do is simply run the bot and the bot does the uploading for you.

Invoice Uploading becomes faster and efficient with the help of this bot.

2. Requirements & Prerequisites

2.1 System Requirements

Windows 10 and above.

2.2 Prerequisites

Automation Anywhere Enterprise Edition v11 and above or Automation Anywhere Community Edition.

2.3 Disclaimers

This bot needs the input Invoices file in CSV format adhering to the Xero standards.

3. Getting Started

3.1 Skill Matrix

This bot has only one Task Bot. It is not dependent on any other bots.

3.2 Installation Hierarchy

- *Download the bot from the Bot Store*
- *Double click on the .msi file*
- *On Welcome to Installation wizard, click Next to continue,*
- *Click I agree to the terms in the license agreement radio button to accept the terms.*
- *Get/Copy the License key from Bot Store Downloads into license key, click Next to continue.*
- *Click Install to begin the installation.*
- *Click Finish to complete the installation.*
- *To view the installation, go to 'My Tasks' Folder on AAE Client to see the bot.*
- *Click on 'Invoice Upload Xero' to run the bot.*

3.3 Uninstall

- *Open Add/Remove Programs -> Select 'Uploading Invoices Xero' bot to be uninstalled*
- *Click uninstall*

3.4 Variables used in the Bot

- *For this Bot –*

INPUT VARIABLES: Input Variables to be mentioned in this Table				
Variable Name	Type	Mandatory	Purpose	Example Input
<i>vFiletoBeUploaded</i>	<i>Text</i>	<i>Yes</i>	<i>The Invoice File(CSV) that is to be uploaded in Xero</i>	<i>C:\Folder_path\File_name.csv</i> <i>Specify the exact location of your File here</i>
<i>vErrorFolder</i>	<i>Text</i>	<i>Yes</i>	<i>This is the error folder which contains the Logs folder and the Snapshot Folder</i>	<i>C:\your file path\ Uploading Invoices Xero - Accountifi\Error Folder</i>

<i>vLogFolder</i>	<i>Text</i>	<i>Yes</i>	<i>This folder contains the logs in case of error</i>	<i>C:\your file path\ Uploading Invoices Xero - Accountifi\Error Folder\Logs</i> <i>Update the file_path to your corresponding path</i>
<i>vSnapshotFolder</i>	<i>Text</i>	<i>Yes</i>	<i>This folder contains the snapshots of error in case of error</i>	<i>C:\your file path\ Uploading Invoices Xero - Accountifi\Error Folder\Snapshots</i> <i>Update the file_path to your corresponding path</i>

4. Logs

Each Bot error logs in the following structure :

. o Error Folder

- *Logs*

- *Error Logs Month-Day-Year.txt: In case of any error, this file logs error message along with time stamp*

- *Snapshots*

- *Error Snap Month-Day-Year.png: In case of any error, this file captures screenshot of error.*

Task Status of bot is set to failed in case of errors.

5. Troubleshooting & Support

5.1 Support

You can contact info@accountifi.co for any support regarding the bot.