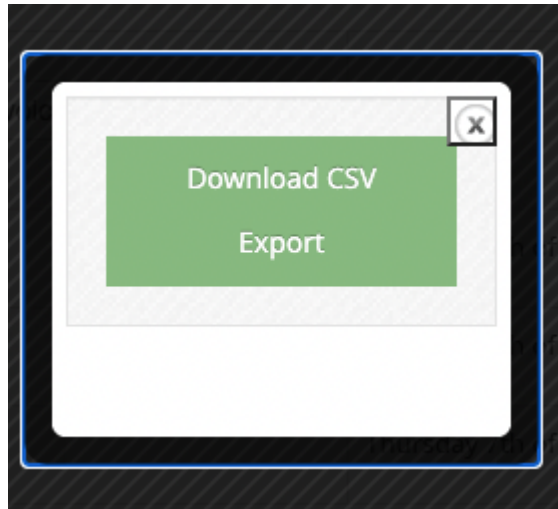# Finance Integrations

How to use Xero with Polixen

In Polixen: Go to Accounts > Client Invoices. You will then be able to see the list of existing invoices and create new invoices by clicking on the light blue button "New Invoice" on the top right-hand side.
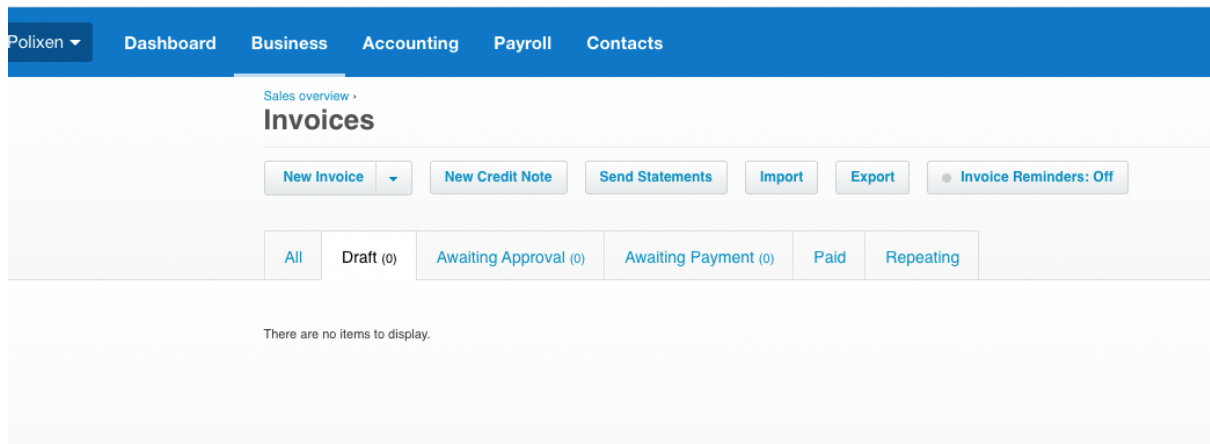
Once you select the invoices you wish to export, click on the green button "Xero Export Selected Invoices".

A pop-up will appear with the option to download the CSV export file.

Once that is done, go to your Xero account and select Business > Invoices.

Click on the "Import" button. Once you are on the Imports page, go to step 3 and click on "browse" (there is no need to change anything on steps 1 and 2) and select the CSV file you just exported from Polixen on your downloads folder. Then click on "Import".

Then click on "Complete import"

Invoices › Import ›
Import your sales invoices

ℹ The imported **POLIXEN-Xero-1657171591.csv** contained 3 invoices, the following will be imported into Xero:
✓ **3** new draft invoices will be imported

Invoices will be imported as drafts and can be edited or deleted afterwards

‹ Go Back   Complete Import

All the imported invoices will be saved as drafts. You can then review the invoices and approve them one by one or select and approve all of them at once by ticking the box next to "Number" and clicking on "approve".

It is also possible to delete invoices that you don't want by clicking on the "delete" button.

How to use MYOB with Polixen

Setup

If you wish to use MYOB with Polixen, please get in touch with us on 1300 790 592 and so we can set up this feature for you.
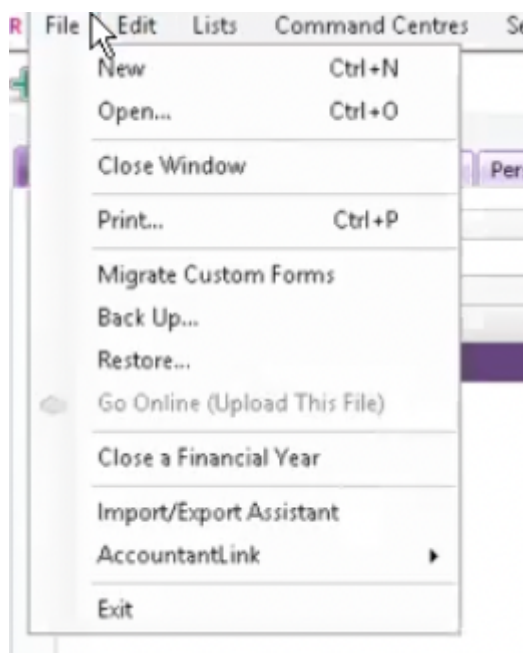
Card IDs & Item Codes

Every client or provider in MYOB must have a Card ID, this is how we link clients in Polixen to clients in MYOB.
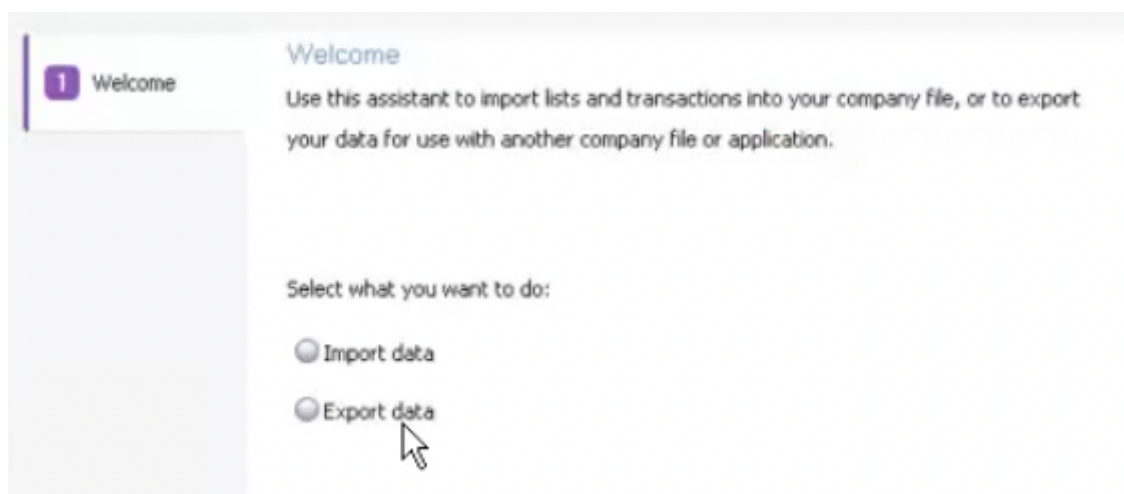
Importing Card IDs from MYOB

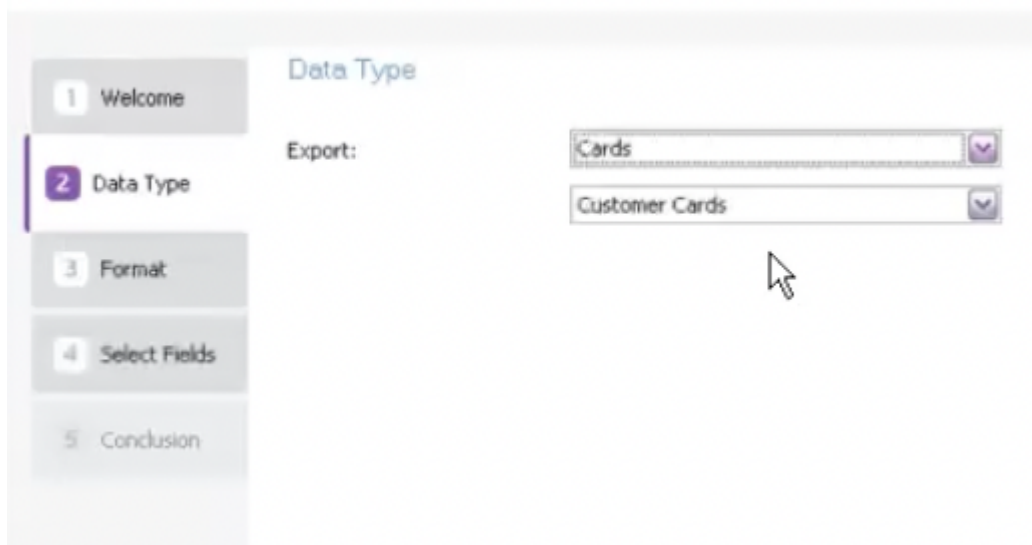Assuming the clients and their card IDs have already been set up in MYOB, we will need to import them into Polixen.

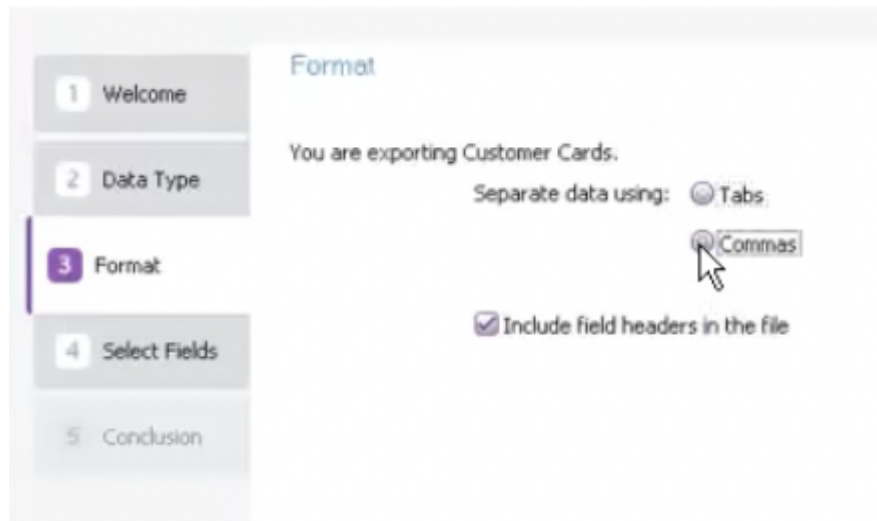Open MYOB, click on "File" > "Import/Export Assistant".

Then click on "Export Data".

On the "Data Type" tab: Select "Cards" > "Customer Cards".

In "Format": Select "Commas".

In "Select Fields": Click on "Add All".

In Conclusion: Click "Export" and save the file.
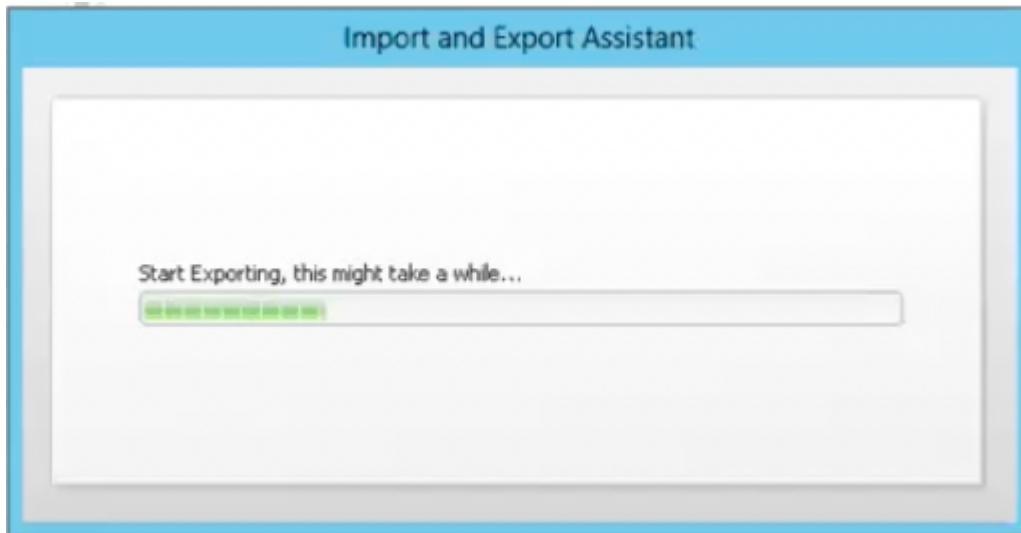
Once that's done, save the MYOB exported csv file and email it to our team or put it in a ticket so we can import that into Polixen for you.

If there are errors, we will email the output so you can make the necessary changes.

Exporting Card IDs from Polixen

All clients' card IDs have to match to their client ID - if you need to update them, get in contact with our team.

To export Card IDs from Polixen, go to "Reports" > "Clients" > "MYOB Client export".
Click on "Export Report" and save the file.

After that, open MYOB. Click on "File" > "Import/Export Assistant". Then, select
"Import Data".
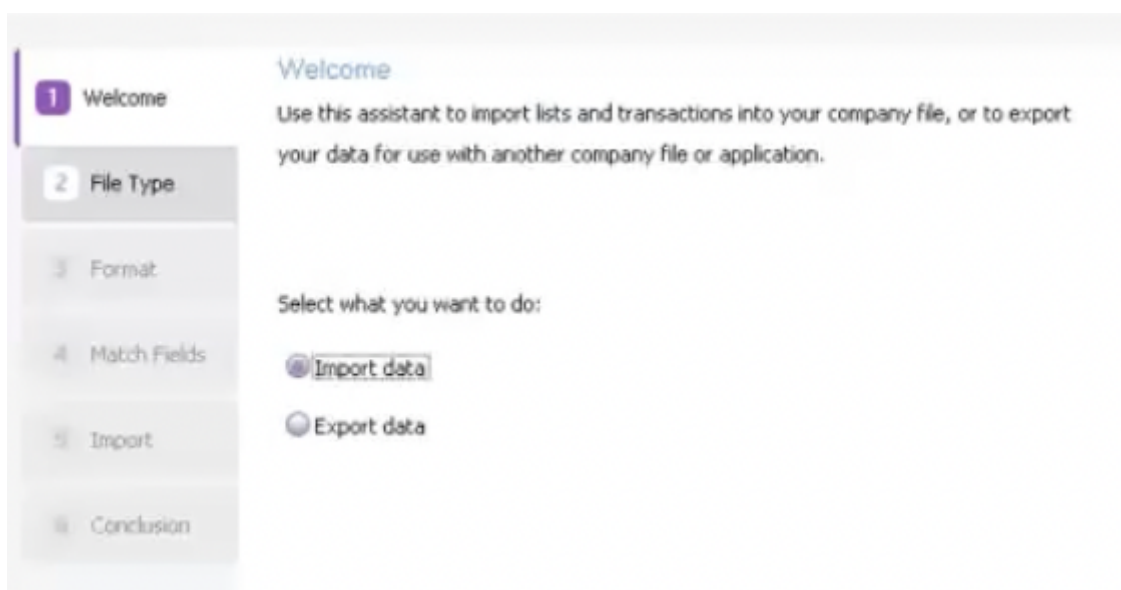
Select "Cards" > "Customer Cards". Then click on "Browse" and make sure you have selected "All Files" and select the Polixen client file.

Select "Commas" > "reject the imported data" > "Match Cards using their Card ID".

Then click on "Match All".

And select "Import".

Item Codes

Every meal item in MYOB must have an Item Code. To find all item codes: Open MYOB, then click on Inventory on the main screen and select "Items List".

After that, log in to Polixen. Click on Admin → Meals & Services → Meal Categories → Set each category's finance code to their respective MYOB Item Number.

Exporting Invoices from Polixen

Generate client/provider invoices normally, then select the invoices you wish to export. Click on the "MYOB Export Selected Invoices" button on the top right-hand side and save the file.

Please note that if an invoice only has a "balance carried forward" line item and no transaction items, it won't be included in the export.
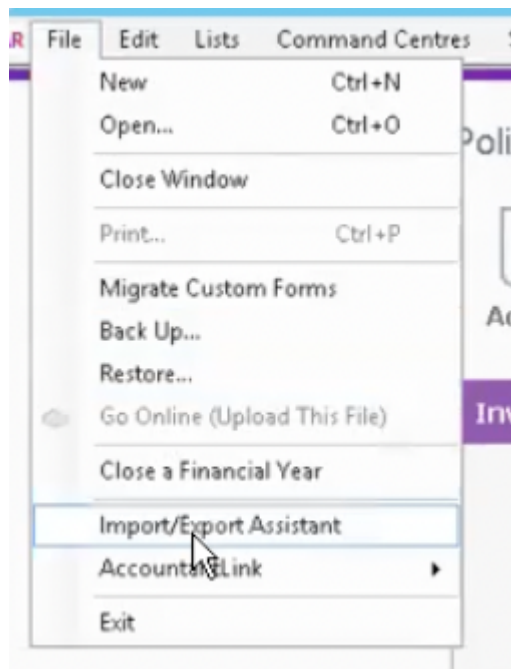
Importing Invoices into MYOB

Open MYOB: Click on "File" > "Import/Export Assistant".

Click on "Import Data".
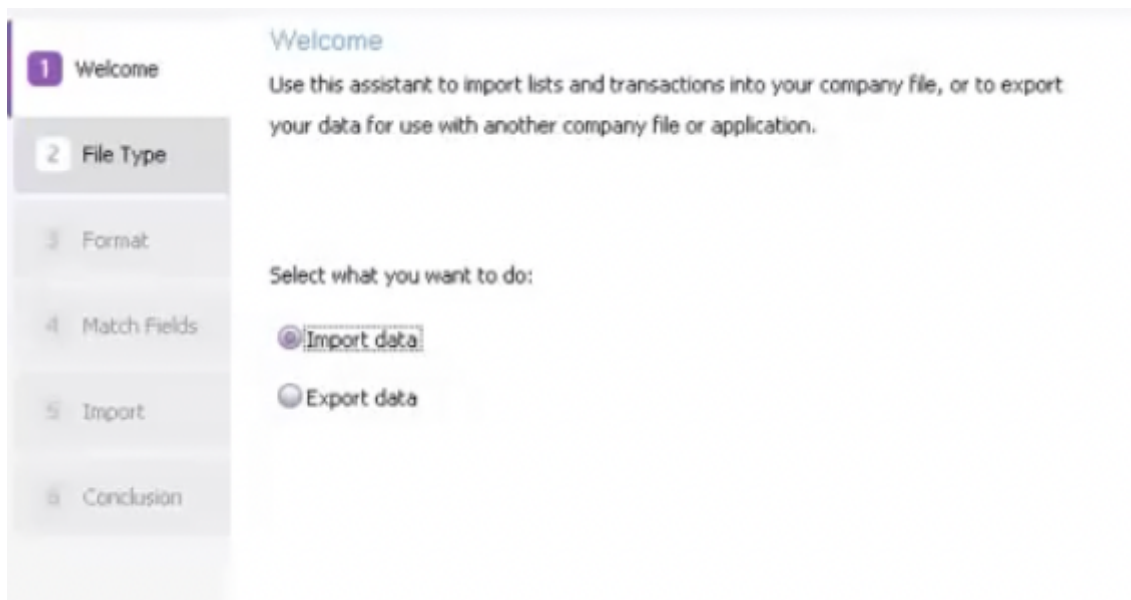
Select "Sales" and "Item Sales". Click on Browse and make sure you have selected "All Files" and select the invoice file.

Select "commas" > "add the import data" > match cards using their "Card ID".

Click on "Match All".

Click on "Import".
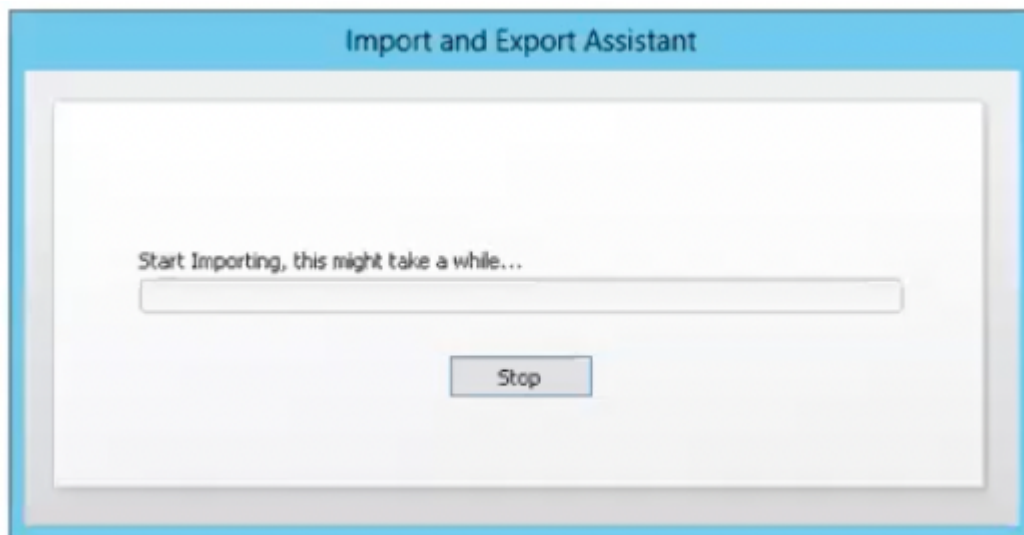
If there is an error, you will have the option of clicking the log file to open it up and investigate.
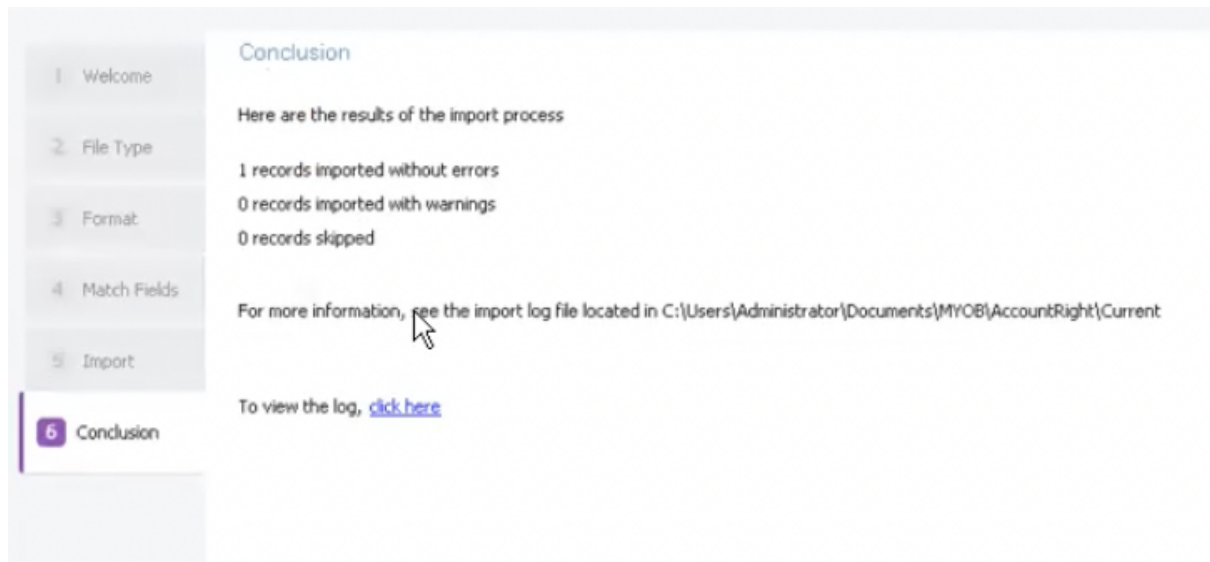
Exporting Payments from Polixen into MYOB

This is currently not recommended due to many integration issues. Please get in touch with us if you need to use this feature.

Exporting Payments from MYOB into Polixen

This is currently not recommended due to many integration issues. Please get in touch with us if you need to use this feature.