



Finance Integrations

[How to use Xero with Polixen](#)

[How to use MYOB with Polixen](#)

[Setup](#)

[Card IDs & Item Codes](#)

[Importing Card IDs from MYOB](#)

[Exporting Card IDs from Polixen](#)

[Item Codes](#)

[Exporting Invoices from Polixen](#)

[Importing Invoices into MYOB](#)

[Exporting Payments from Polixen into MYOB](#)

[Exporting Payments from MYOB into Polixen](#)

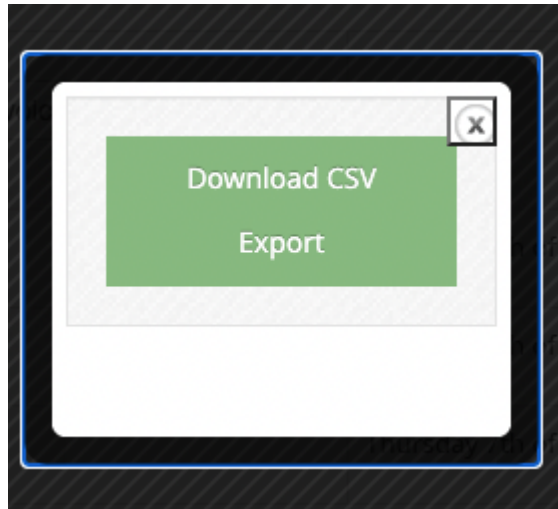
How to use Xero with Polixen

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.

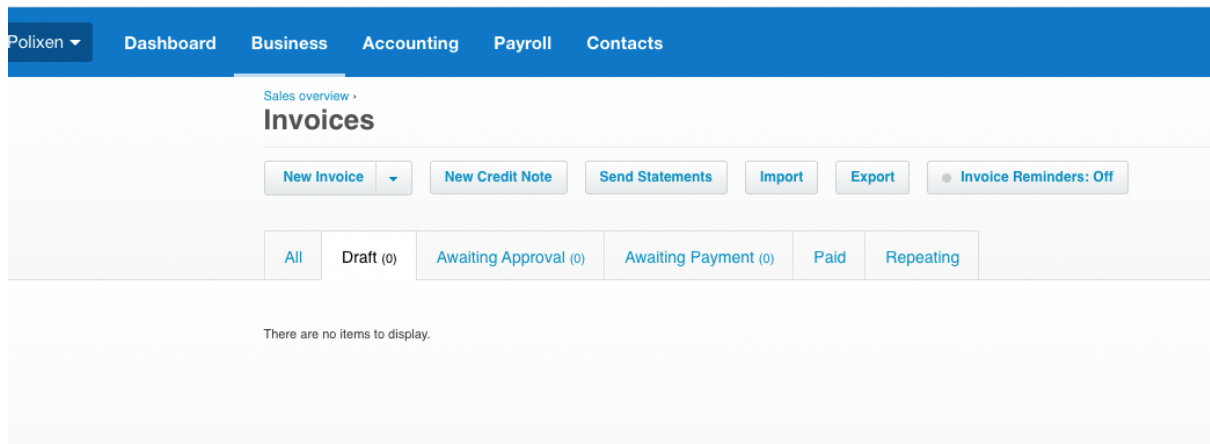
Once you select the invoices you wish to export, click on the green button “Xero Export Selected Invoices”.

Start :	07/06/2022	End :	07/07/2022	Search	Search by Invoice ID :	Invoice ID	Search	New Invoice	Xero Export Selected Invoices
Deselect All	Invoice ID	Client	Emailed At	Filter by Inv ▾	Date Issued	Invoice Total	Outstanding Amount	Show Unpaid and Partially ▾	
Select All									
<input checked="" type="checkbox"/>	21580	Goldings, Jennifer			Thursday 7th of July	\$5,038.00	\$5,038.00	UNPAID	
<input checked="" type="checkbox"/>	21581	Strabs, Paul			Thursday 7th of July	\$2,949.00	\$2,949.00	UNPAID	
<input checked="" type="checkbox"/>	21582	Shaw, Belinda			Thursday 7th of July	\$3,972.00	\$3,972.00	UNPAID	

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”.

Import your sales invoices


What system are you importing from?

- ☒ Xero
- ☐ MYOB - Service Sales Format
- ☐ MYOB - Item Sales Format

To import invoices from another system please follow the steps below...

Step 1. Download our invoices template file

Start by downloading our invoices CSV (Comma Separated Values) template file. This file has the correct column headings Xero needs to import your invoice data.

 [Download template file](#)

Step 2. Copy your invoices into the template

Export your invoices from your old system as a comma separated list. Using Excel or another spreadsheet editor, copy and paste your invoices from the exported file into the Xero template. Make sure the invoice data you copy matches the column headings provided in the template.

IMPORTANT: Do not change the column headings provided in the Xero template. These need to be unchanged for the import to work in the next step.

Dates are assumed to be in English (Australia) format. For example, 25/12/2022 or 25 Dec 2022.

Step 3. Import the updated template file

Select the file to import

[Browse](#)

No file selected

The file you import must be a CSV (Comma Separated Values) file. The name of your file should end with either **.csv** or **.txt**.

Would you like to update contact address details?

- ☒ No, ignore all address details
- ☐ Yes, update contacts with imported address details

Is the UnitAmount field tax inclusive or exclusive?

- ☒ Tax Exclusive
- ☐ Tax Inclusive

[Import](#)

[Cancel](#)

Then click on “Complete import”

Import your sales invoices



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.

Sales overview >

Invoices

[New Invoice](#)
[New Credit Note](#)
[Send Statements](#)
[Import](#)
[Export](#)
[Invoice Reminders: Off](#)

[All](#)
[Draft \(3\)](#)
[Awaiting Approval \(0\)](#)
[Awaiting Payment \(0\)](#)
[Paid](#)
[Repeating](#)

[Submit for approval](#)
[Approve](#)
[Delete](#)
[Print](#)
[Email](#)
[Copy to...](#)
3 items selected | 21.00 AUD

Number	Ref	To	Date	Due Date	Due
<input checked="" type="checkbox"/> POLIXEN 21582		<input type="checkbox"/> Belinda Shaw	7 Jul 2022	6 Aug 2022	7.00
<input checked="" type="checkbox"/> POLIXEN 21581		<input type="checkbox"/> Paul Strabs	7 Jul 2022	6 Aug 2022	7.00
<input checked="" type="checkbox"/> POLIXEN 21580		<input type="checkbox"/> Jennifer Goldings	7 Jul 2022	6 Aug 2022	7.00

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.

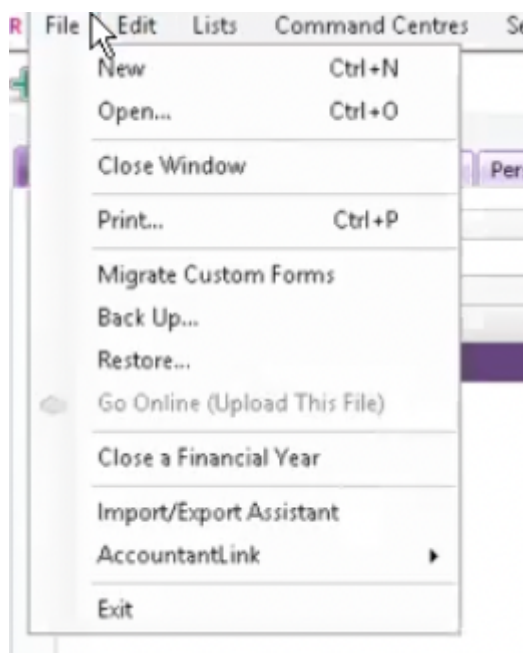
Card IDs & Item Codes

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

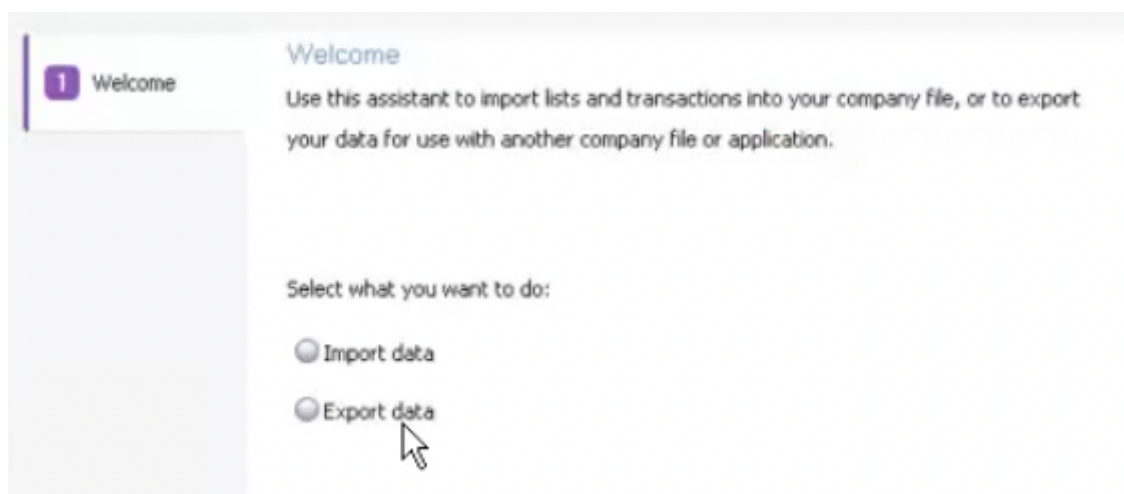
Importing Card IDs from MYOB

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

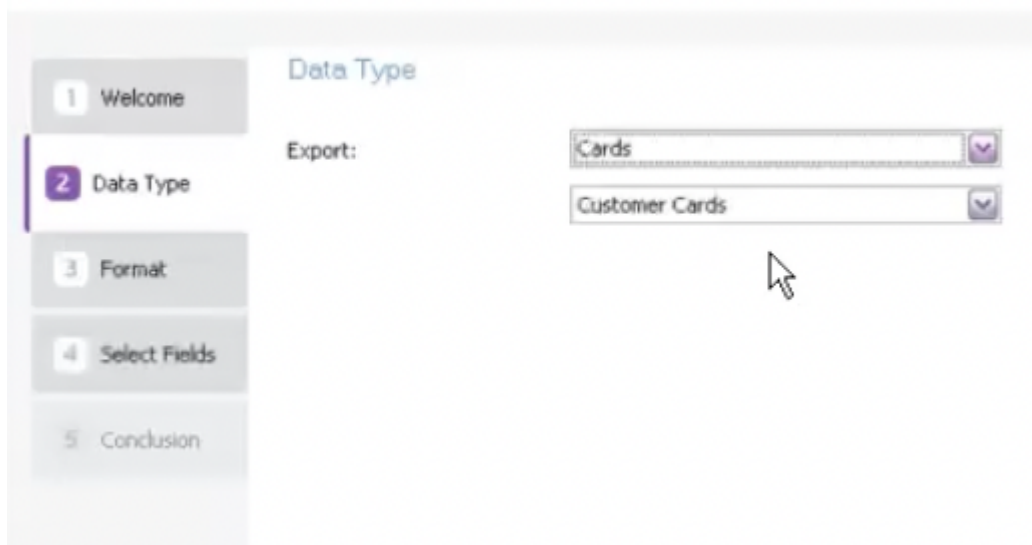
Open MYOB, click on “File” > “Import/Export Assistant”.



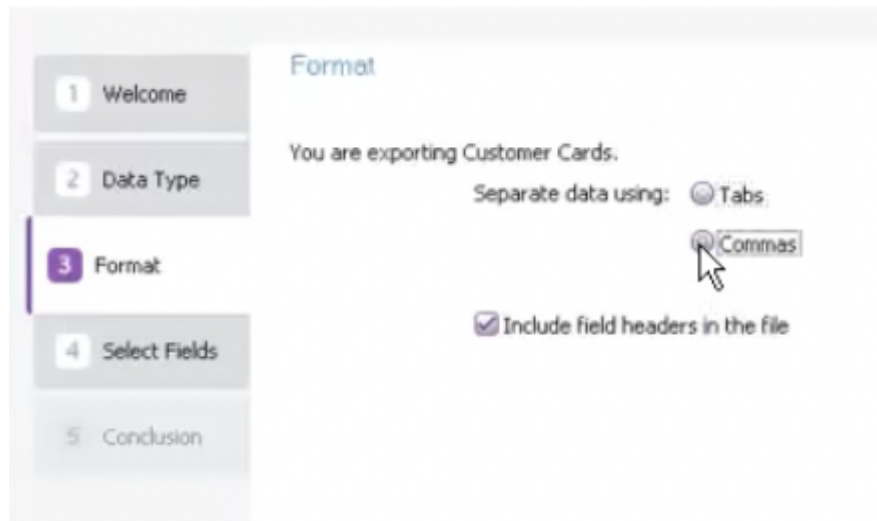
Then click on “Export Data”.



On the “Data Type” tab: Select “Cards” > “Customer Cards”.



In “Format”: Select “Commas”.



In “Select Fields”: Click on “Add All”.

1 Welcome

2 Data Type

3 Format

4 Select Fields

5 Conclusion

Select Fields

Select the fields you want to export.

Available fields

No records exist or match your criteria

Add >

Remove <

Add All >>

Remove All <<

Fields to export

Co.,Last Name

First Name

Card ID

Card Status

Addr 1 - Line 1

Addr 1 - Line 2

Addr 1 - Line 3

Addr 1 - Line 4

Addr 1 - City

Addr 1 - State

Addr 1 - Postcode

Addr 1 - Country

Addr 1 - Phone No. 1

Addr 1 - Phone No. 2

Addr 1 - Phone No. 3

Addr 1 - Fax No.

Addr 1 - Email

Addr 1 - WWW

Addr 1 - Contact Name

Addr 1 - Salutation

Addr 2 - Line 1

Addr 2 - Line 2

Addr 2 - Line 3

Addr 2 - Line 4

Addr 2 - City

Addr 2 - State

Addr 2 - Postcode

Addr 2 - Country

Addr 2 - Phone No. 1

Addr 2 - Phone No. 2

Addr 2 - Phone No. 3

Addr 2 - Fax No.

Addr 2 - Email

Addr 2 - WWW

Addr 2 - Contact Name

Addr 2 - Salutation

Addr 3 - Line 1

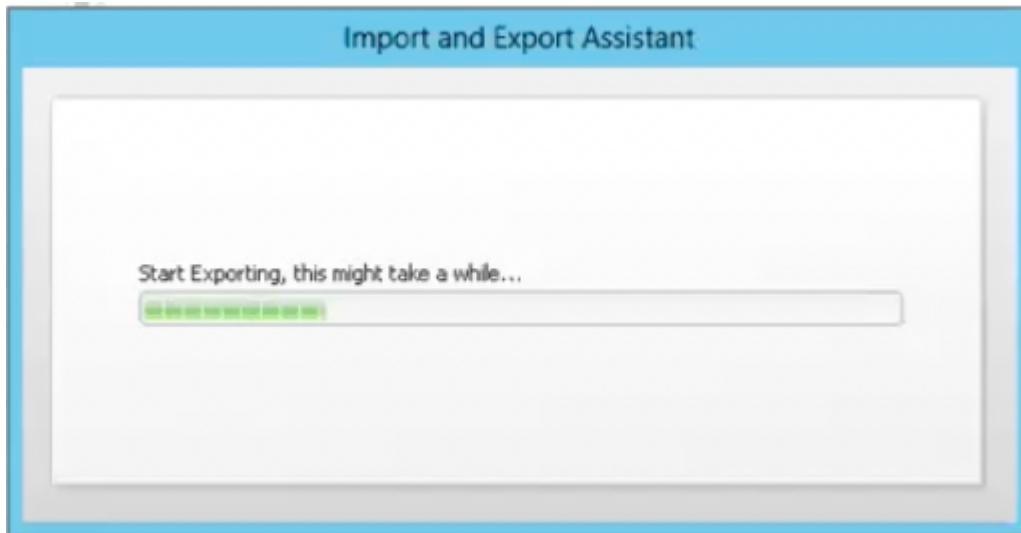
^

v

* Required when importing this data into a company file.

^At least one of these fields are required when importing this data into a company file.

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.

A screenshot of a web application interface for a client profile. At the top, the name "Terry Apples (#2202)" is displayed in blue text, with a mouse cursor pointing at it. Below the name is a horizontal tab bar with four tabs: "Client Information" (active), "Client Contacts", "Other Information", and "Help". Under the "Client Information" tab, the section "Name Details" is visible. It contains two input fields: "Title:" with a dropdown menu showing "Mr" and a downward arrow, and "MYOB Card #:" with a text box containing the number "2202".

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

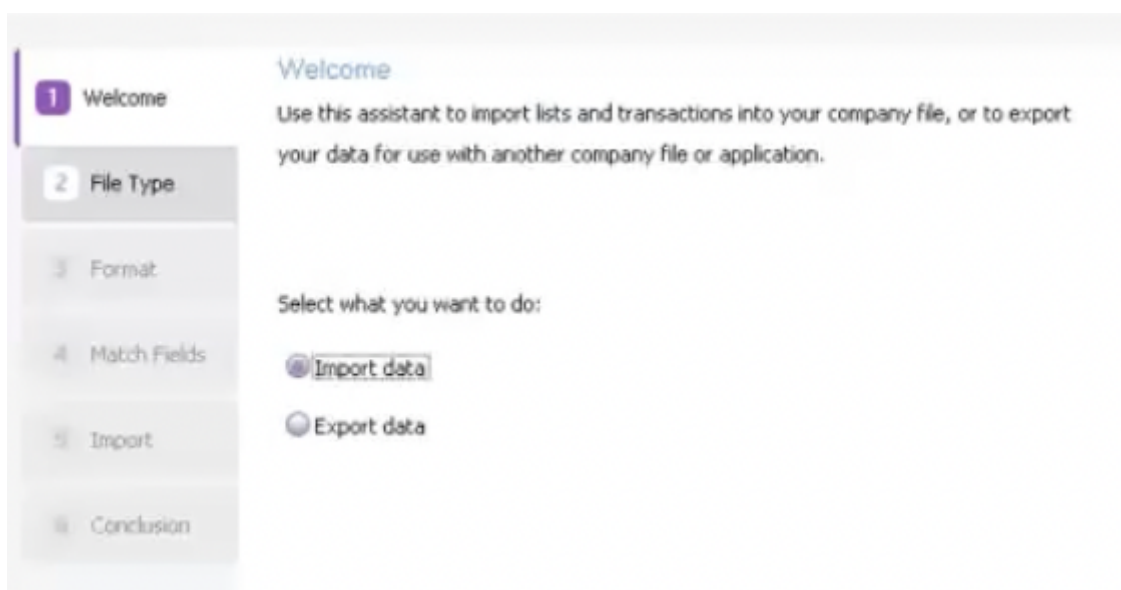
Client Reports » MYOB Client Report

MYOB Client Report

Export Report

Download Exported Clients CSV

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.

The screenshot shows a wizard interface with a sidebar on the left containing six steps: 1 Welcome, 2 File Type (highlighted), 3 Format, 4 Match Fields, 5 Import, and 6 Conclusion. The main area is titled 'File Type' and contains the following elements:

- 'Import:' dropdown menu set to 'Cards'.
- 'Cards type:' dropdown menu set to 'Customer Cards'.
- Text: 'File containing the data you want to import:'
- Text input field containing the file path: 'C:\Users\Administrator\Desktop\polixen_myob.csv'.
- 'Browse' button.

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

The screenshot shows the same wizard interface, but now step 3 'Format' is highlighted in the sidebar. The main area is titled 'Format' and contains the following elements:

- Text: 'You are importing Customer Cards'.
- 'Data is separated by:' section with two radio buttons: 'Tabs' (unselected) and 'Commas' (selected).
- 'The first line of the file contains:' section with two radio buttons: 'Headers or Labels' (selected) and 'Data' (unselected).
- Text: 'If data you are importing already exists in this company file:'
- 'Reject the import data' dropdown menu.
- Text: 'Match Cards using their:'
- 'Card ID' dropdown menu.

Then click on “Match All”.

Match Fields

Match the fields you want to import with the available fields .

* Required Fields Conditional Fields

Import fields	Available fields	Matched Import fields
LastName	Co./Last Name	
FirstName	First Name	
CardID	Card ID	
CardStatus	Card Status	
A1Line1	Addr 1 - Line 1	
A1Line2	- Line 2	
A1Line3	- Line 3	
A1Line4	- Line 4	
A1City	- City	
A1State	- State	
A1Postcode	- Postcode	
A1Country	- Country	
A1Phone1	- Phone # 1	
A1Phone2	- Phone # 2	
A1Phone3	- Phone # 3	
A1Fax	- Fax #	
A1Email	- Email	
A1WWW	- WWW	
A1ContactName	- Contact Name	
A1Salutation	- Salutation	
A2Line1	Addr 2 - Line 1	
A2Line2	- Line 2	
A2Line3	- Line 3	
A2Line4	- Line 4	
A2City	- City	
A2State	- State	
A2Postcode	- Postcode	
A2Country	- Country	
A2Phone1	- Phone # 1	
A2Phone2	- Phone # 2	
A2Phone3	- Phone # 3	
A2Fax	- Fax #	
A2Email	- Email	
A2WWW	- WWW	
A2ContactName	- Contact Name	
A2Salutation	- Salutation	

Auto Match Match All Unmatch All

And select “Import”.

Conclusion

Here are the results of the import process

12 records imported without errors

0 records imported with warnings

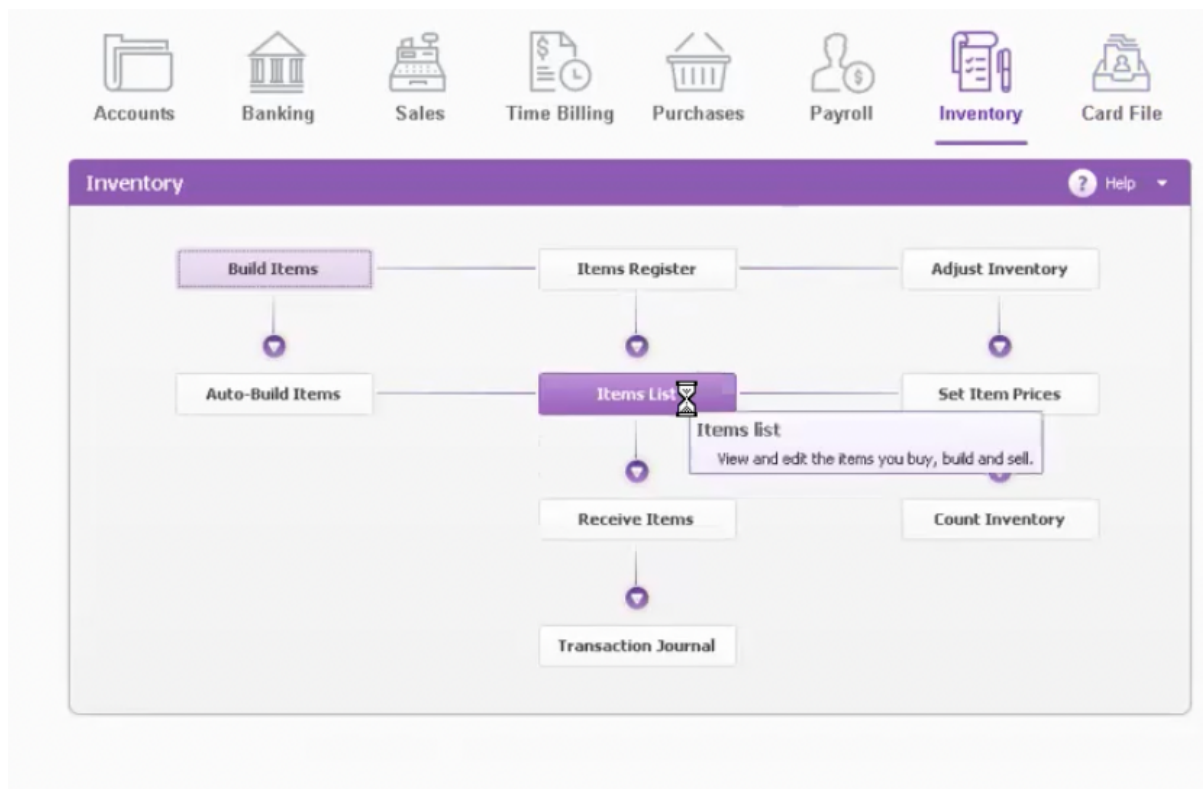
0 records skipped

For more information, see the import log file located in C:\Users\Administrator\Documents\MYOB\AccountRight\Current

To view the log, [click here](#)

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”.



The screenshot shows the MYOB Item Details form for "Hot Mains". The form includes tabs for Profile, Item Details, Buying Details, Selling Details, History, and Auto-Build. The Item Number is "HM" and the Name is "Hot Mains". There is an "Inactive Item" checkbox. Below these are checkboxes for "I Buy This Item", "I Sell This Item" (checked), and "I Inventory This Item". An "Income Account for Tracking Sales" dropdown is set to "4-1000". A "Copy From" button and a "Spell" button are also visible. An account selection window is open, showing a list of accounts:

Account	Name	Classification
4-1000	Services Income	Income
4-2000	Stock Income	Income
4-3000	Late Fees Collected	Income
6-1100	Accounting/Bookkeeping Fees	Expense
6-1200	Advertising & Marketing	Expense
6-1300	Bank Fees	Expense
6-1400	Borrowing Expenses	Expense
6-1500	Bad Debts	Expense
6-1600	Cleaning Expenses	Expense
6-1700	Electricity Expenses	Expense
6-1800	Gas Expenses	Expense
6-1900	Legal Fees	Expense

The window has "Cancel", "New...", "Use Account", and a green checkmark button at the bottom.

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.

View Meal Category

Apply Ingredients & Properties

Category Name:

Hot Meals

Finance Code:

HM

Save Changes

Delete Meal Category

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.

Accounts » List Invoices

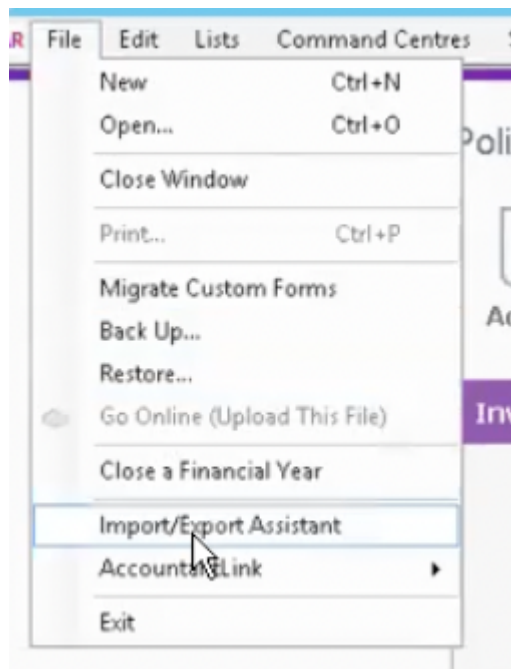
☐ Only Display Package Provider Clients
 All Services

Start: 18/09/2021 End: 17/09/2021 Search
 Search by Invoice ID: Invoice ID Search
 New Invoice MYOB Export Selected Invoices

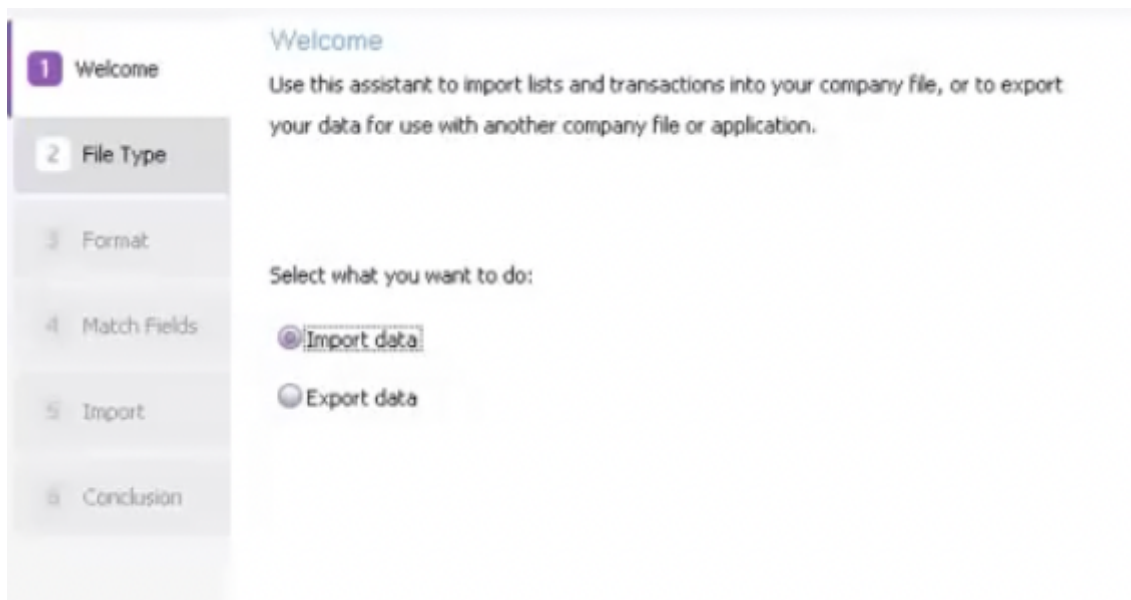
Desktop All	Invoice ID	Client	Emailed At	Filter by Invoice T1	Date Issued	Invoice Total	Outstanding Amount	Show Unpaid and
<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	26293	Shaw, Belinda			Friday 3rd of September	\$4,080.50	\$4,080.50	UNPAID
<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	26292	Jones, Bob			Friday 3rd of September	\$1,743.00	\$1,743.00	UNPAID
<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	26290	Goldings, Jennifer			Friday 3rd of September	\$5,305.00	\$5,305.00	UNPAID
<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	26289	Smith, John			Friday 3rd of September	\$4,436.50	\$4,436.50	UNPAID
<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	26291	Strabs, Paul			Friday 3rd of September	\$3,134.50	\$3,134.50	UNPAID
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	26295	Apples, Terry			Friday 17th of September	\$524.00	\$524.00	UNPAID

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.

1 Welcome

2 File Type

3 Format

4 Match Fields

5 Import

6 Conclusion

File Type

Import:

Sales type:

File containing the data you want to import:

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

1 Welcome

2 File Type

3 Format

4 Match Fields

5 Import

6 Conclusion

Format

You are importing Item Sales

Data is separated by: ☐ Tabs ☒ Commas

The first line of the file contains: ☒ Headers or Labels ☐ Data

If data you are importing already exists in this company file:

Match Cards using their:

Click on “Match All”.

Match Fields

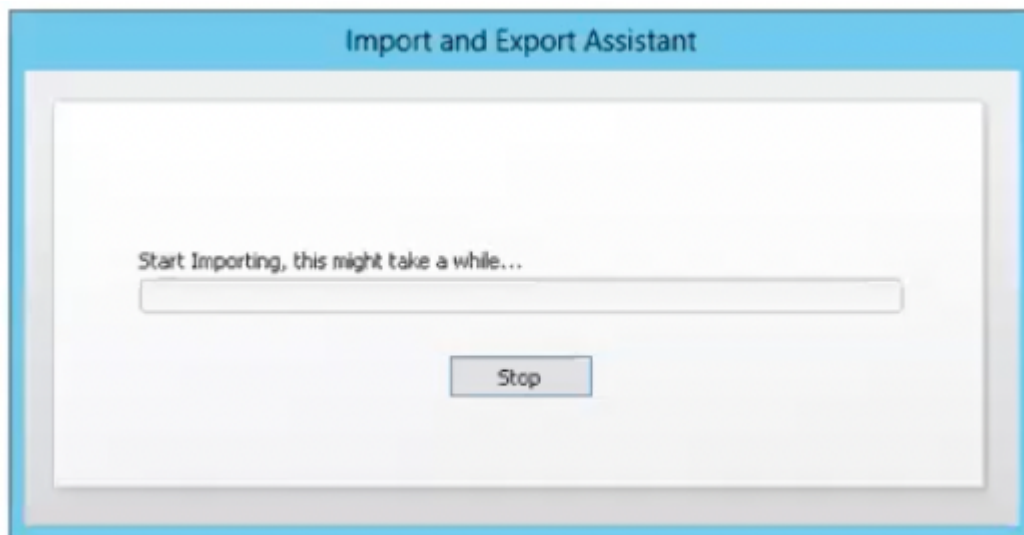
Match the fields you want to import with the available fields .

* Required Fields ^ Conditional Fields

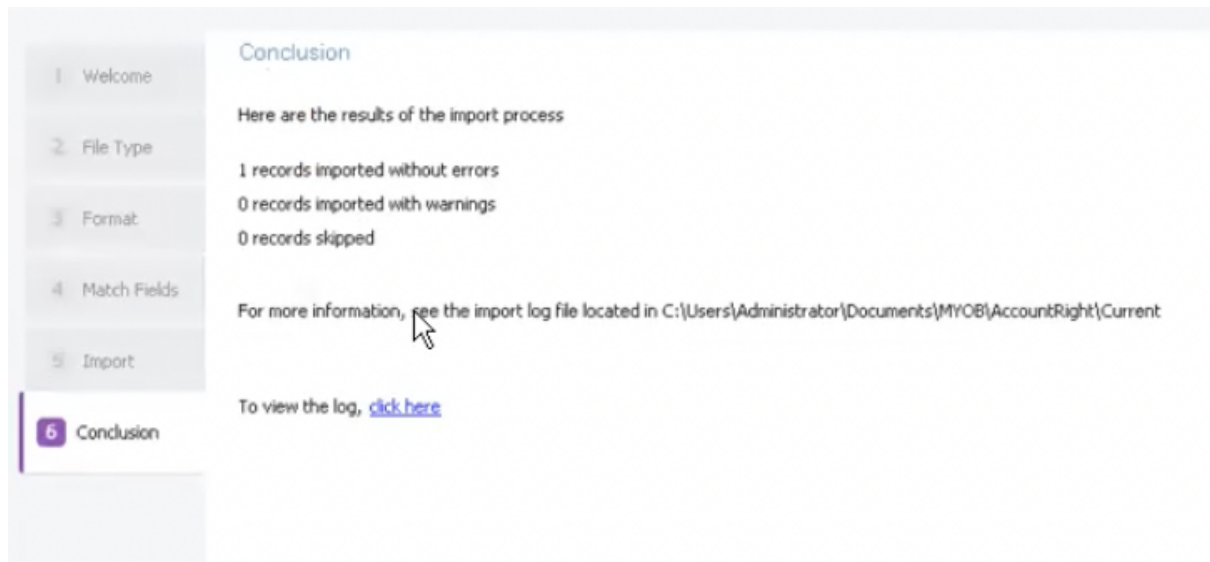
Import fields	Available fields	Matched Import fields
LastName	Comment	Comment
FirstName	Journal Memo	JournalMemo
ALine1	Salesperson Last Name	SlsmtLN
ALine2	Salesperson First Name	SlsmtFN
ALine3	Shipping Date	ShipDate
ALine4	Referral Source	RefSource
Inclusive	Tax Code	TaxCode
InvoiceNo	Non-GST Amount	NonGSTAmt
Date	GST Amount	GSTAmt
CustomerPO	LCT Amount	LCTAmt
ShipVia	Freight Amount	FreightAmt
Del Status	Inc-Tax Freight Amount	IncTaxFrtAmt
ItemNo	Freight Tax Code	FrtTaxCode
Quantity	Freight Non-GST Amount	FrtNonGSTAmt
Descr	Freight GST Amount	FrtGSTAmt
Price	Freight LCT Amount	FrtLCTAmt
IncTaxPrice	Sale Status	SaleStatus
Discount	Terms - Payment is Due	Terms
Total	- Discount Days	DiscountDays
IncTaxTotal	- Balance Due Days	Balance Due Days
Job	- % Discount	% Discount
Comment	- % Monthly Charge	Monthly Charge
JournalMemo	Amount Paid	AmntPaid
SlsmtLN	Payment Method	PmtMethod
SlsmtFN	Payment Notes	PmtNotes
ShipDate	Name on Card	NameonCd
RefSource	Card Number	CardNo
TaxCode	Authorisation Code	ExpirationDate
NonGSTAmt	BSB	AuthNumber
GSTAmt	Expiry Date	BSB
LCTAmt	Account Number	AccountNo
FreightAmt	Drawer/Account Name	DrawerAccountName
IncTaxFrtAmt	Cheque Number	ChequeNo
FrtTaxCode	Category	Category
FrtNonGSTAmt	^ Card ID	CardId
FrtGSTAmt	^ Record ID	RecordId

Auto Match Match All Unmatch 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.