

# Xero Approval Requests

How transactions are sent for approval from Xero to Approval Donkey and the subsequent behaviour of these transactions in Xero.

## Prerequisites

For any transactions to be sent from Xero to Approval Donkey the integration between these apps must be set-up first.

To learn how to set-up this integration see the guide: **Setting up Xero Integration**

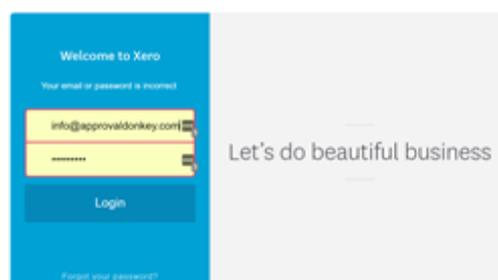
## General Points

- The integration with Xero and Approval Donkey only handles approvals for Invoices, Bills, Purchase Orders and Credit Notes that you '**Save and Submit for approval**'
- These transactions will be sitting in your 'Awaiting Approval' folder in Xero and are automatically pulled into Approval Donkey and routed to your approvers (Panels)
- Approval Donkey calls Xero every 5 mins and pulls any transactions in the 'Awaiting Approval' folder
- Once approved any transactions in Xero automatically move from the 'Awaiting Approval' folder to the 'Awaiting Payment' folder

## Step by Step - Overview

Note: This overview only shows you the behavior of a Xero to Approval Donkey and back to Xero integration, for details on how to set this integration up please refer to the Xero Set-up guide.

Login to your integrated Xero organisation

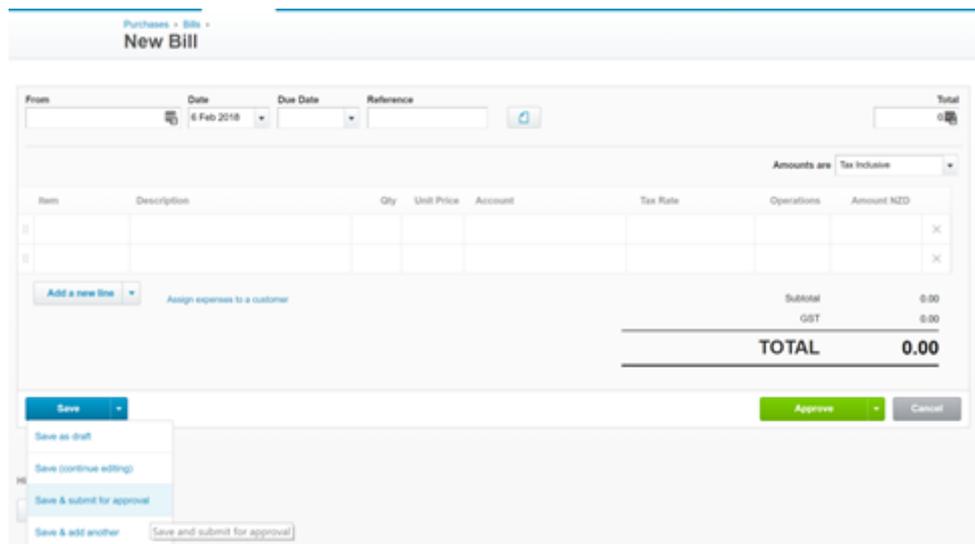


Create a Xero transaction (Invoice, Bill, Purchase Order or Credit Note)

**Note:** Only Bill example shown.



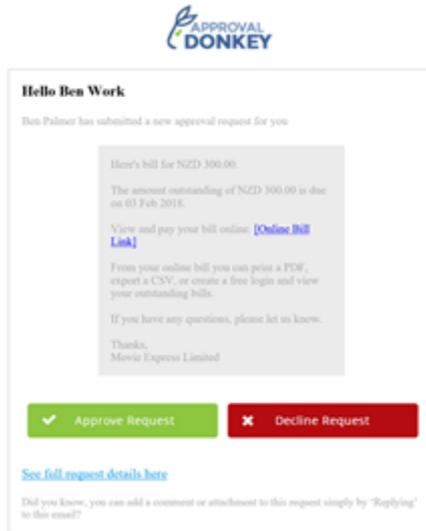
Complete the transaction details and **'Save & submit for approval'** this will automatically route this transaction to Approval Donkey and the Panel you have mapped for the integration.



Xero transactions will automatically appear in your Approval Donkey Dashboard with a 'Pending' status.



Panel members will also be automatically emailed an Approval Request and can Approve or Decline the request directly from email.



Any 'Pending' transactions in Approval Donkey will be in the 'Awaiting Approval' folder in Xero.

All	Draft (0)	Awaiting Approval (3)	Awaiting Payment (3)	Paid	Repeating
<input type="button" value="Approve"/> <input type="button" value="Delete"/> <input type="button" value="Print"/> <span>No items selected</span>					
tef	From	Date	Due Date		
<input type="checkbox"/>	Test AD	2 Feb 2018	3 Feb 2018		
<input type="checkbox"/>	Test AD	2 Feb 2018	9 Feb 2018		
<input type="checkbox"/>	Test	2 Feb 2018	9 Feb 2018		

When all required approvers have approve a transaction on Approval Donkey the status changes to 'Approved'.



Any 'Approved' transactions in Approval Donkey will automatically shift transactions to the 'Awaiting Payment' folder in Xero.

[All](#)
[Draft \(0\)](#)
[Awaiting Approval \(3\)](#)
[Awaiting Payment \(1\)](#)
[Paid](#)
[Repeating](#)

**Schedule of Planned Payments**

Set a Planned Date on bills to create a payment schedule

[Print](#)
[Batch Payment](#)
[Schedule Payments](#)
No items selected

ref	From	Date ▾	Due Date	Planned
 Test AD		2 Feb 2018	9 Feb 2018	

The History & Notes section in Xero is automatically updated in Xero and time stamped.

**History & Notes**

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Approved by System Generated on 2 Feb 2018 at 14:19p.m.  
**Received through the Xero API from Approval Donkey**

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Tracking and history is always available from Approval Donkey.

**Tracking** Status ▾

 Ben AD		 Approved
 Kerry Palmer	Owner	 Approved

**History**

 Kerry Palmer	Approved the request	4 days ago
 Ben AD	Added attachment  Bill.pdf	4 days ago
 Ben AD	Created the request	4 days ago