

Microsoft Dynamics 365 and Xero

Stellarise Connector for Microsoft Dynamics 365 and Xero



No-Code integration and automation for Microsoft Dynamics 365 and Xero

Stellarise Connector for Dynamics 365 and Xero is a SaaS (Software as a Service solution) that intelligently moves information from Microsoft Dynamics 365 to Xero, supporting a workflow that allows you to create leads, opportunities, orders and invoices in Microsoft Dynamics 365 and then manage the financial process for these in Xero, where you can handle payments and reconciliation.

The connection is easily configured and allows you to:

- Mix and match existing products alongside Write-In products Dynamics 365 invoices.
- Extend existing Microsoft Dynamics 365 functionality to support Purchase Invoices, Sales Invoices and Credit Notes.
- Configure whether you want Microsoft Dynamics 365 to create new Xero Contacts, or instead only sync Invoices where the Contacts already exist.
- Choose if you want Microsoft Dynamics 365 to create new Xero Items (Products in Dynamics), or only create an Invoice if these Items exist already.

Easy to Manage

The built-in Sync history gives you full visibility on any sync issues for each invoice putting you in control, so you can resolve them.

Contact us for Customisation

Our easily configured standard plans are perfect for the most common situations. But if you have custom fields in Dynamics 365 that you want to sync across to Xero, we can help. [Contact us to discuss your custom configuration requirements](#) and we can quickly customise a template for you to sync anything you need.

Release History

3.5.0 - Current

- You can now streamline your workflow and automatically send invoices to customers via email from Xero once they have been synced.
- You can manually enter your own invoice numbers in Dynamics 365 and have these synced to Xero. This is really useful if you enter your Purchase Invoices in Dynamics.

Find out how to set these options here [3.5.0 Configure Stellarise Connector](#)

If you just want to know how to upgrade to check out [3.5.0 Upgrading Stellarise Connector](#)

3.4.0

We've made more usability enhancements in this release, so that you can now:

- Handle bundled products
- Embedded Stellarise Connector documentation in Microsoft Dynamics 365

We've also updated the SiteMap so that the connector works with the new Sales Hub.

3.2.0

We continue to improve Stellarise Connector for Dynamics 365 and Xero. With this release:

- products now have GL Codes and Tax Rates in Dynamics 365
- you can rename the Connection Name to something more meaningful
- we've cleaned up the Dynamics Tiles view.

Default Values

You can now define defaults to be applied to your invoices in Microsoft Dynamics 365 for the

- Stellarise Connector used to sync the invoice to Xero
- The Branding Theme to be applied
- Default Account Codes to be applied for Sales and Purchase invoices.

1.16.x

Stellarise Connector for Dynamics 365 and Xero quickly syncs invoices, payments, and accounts between Microsoft Dynamics 365 and Xero systems.

1.15.x

First Stellarise Connector for Dynamics 365 and Xero version to be reported in docs.stellarise.com!