Sync BenchWorks Inventory with Xero Accounting Software

Get BenchWorks free for 30 days: getbenchworks.com
Try Xero free for 30 days: xero.com

BenchWorks is an easy-to-use product management tool for artists and makers.
Xero is Beautiful Accounting Software.

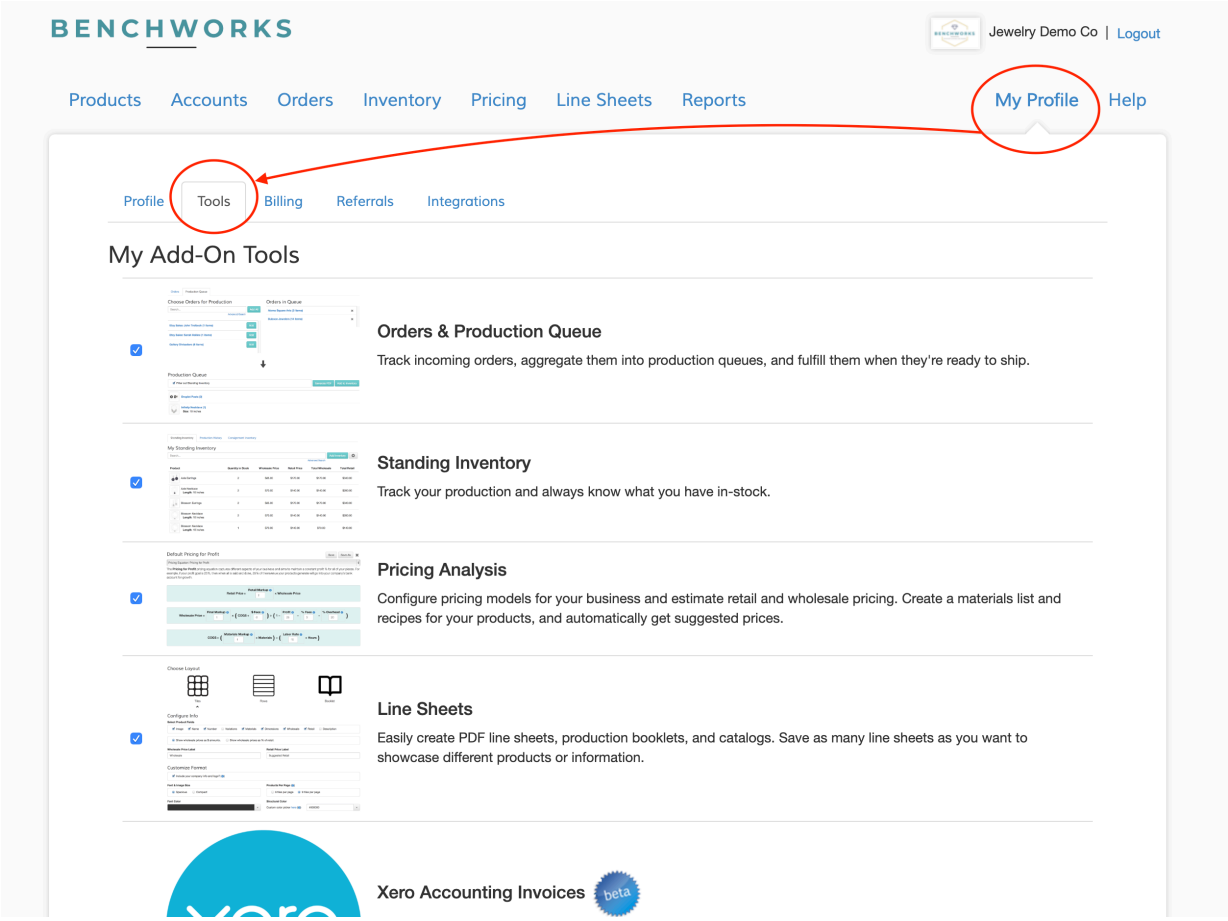
Goal:

Sync order invoices in BenchWorks to Xero Invoices to:

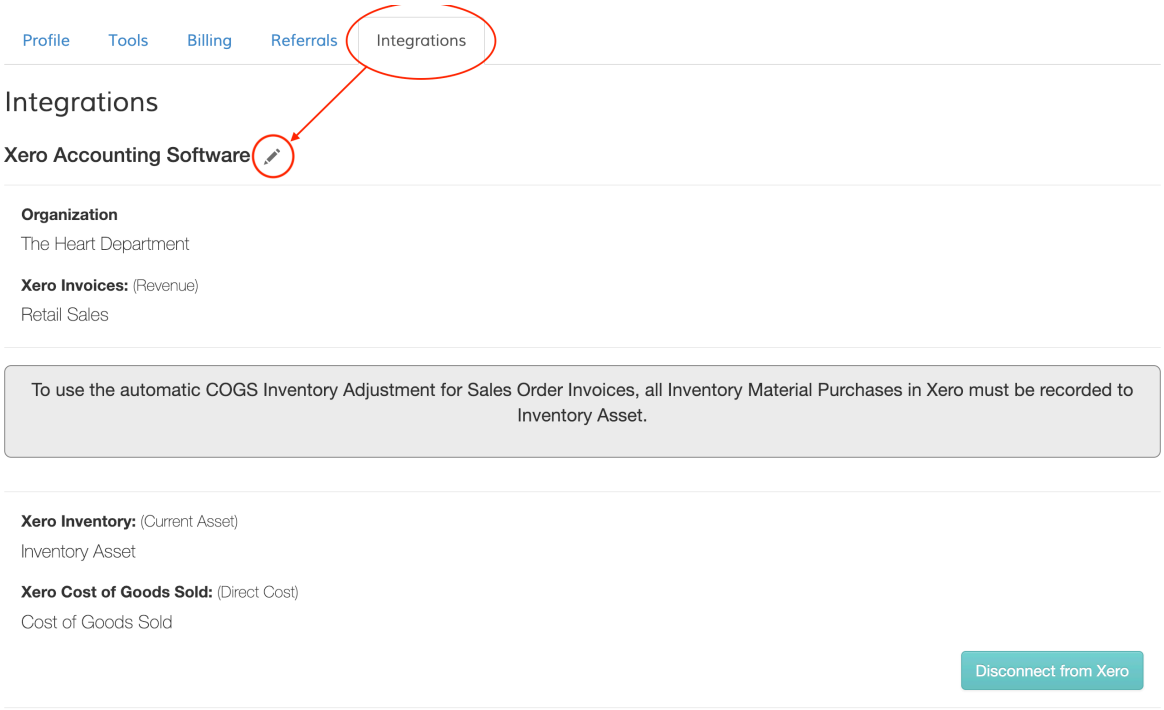
- email customers to get paid online
- match orders to deposits in your bank account

(Optional) If you use Materials Inventory in BenchWorks, you can also turn on the Cost of Goods Sold adjustment, to move the cost of your items sold from Inventory Asset to Cost of Goods Sold expense. This will create a Bill for the adjustment with each Synced Invoice.

Step 1: Turn on the Xero Integration in BenchWorks for the first time



1. Login to your BenchWorks account.
2. Click on “My Profile”
3. Click on the “Tools” tab
4. Scroll down to tick the Check Box next to “Xero Accounting Invoices”
    a. If you have Materials Inventory enabled under the Profile tab, then you can check to also “Create Xero Cost of Goods Sold report on sync” (optional). *
    b. Click “Configure Xero Accounts.” This takes you to the Integrations tab.
5. Click the Pencil icon to edit.



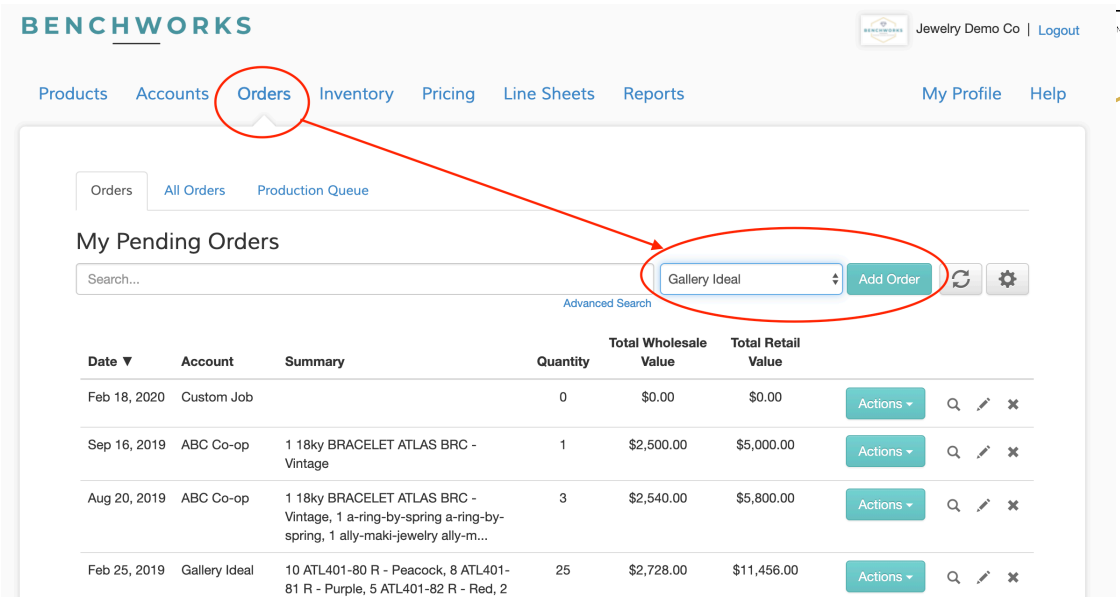
    a. Select the Revenue account where your Sales Income should go in Xero. If you have multiple Sales accounts in Xero, select the one used the majority of the time as the default. For example, if you have both Retail and Wholesale Sales accounts in Xero, select the account used most often for orders in BenchWorks.
    b. If you have turned on the Cost of Goods Sold adjustment, select:
        i. Xero Inventory Asset Account (example: Inventory)
        ii. Xero Cost of Goods Sold Account (example: Direct Costs)
6. Click the “OK” button to save.

*Note: Only turn on the cost of goods sold report adjustment if you record the purchases of materials to an Inventory Asset account in Xero.

Step 2: Add an Order in BenchWorks

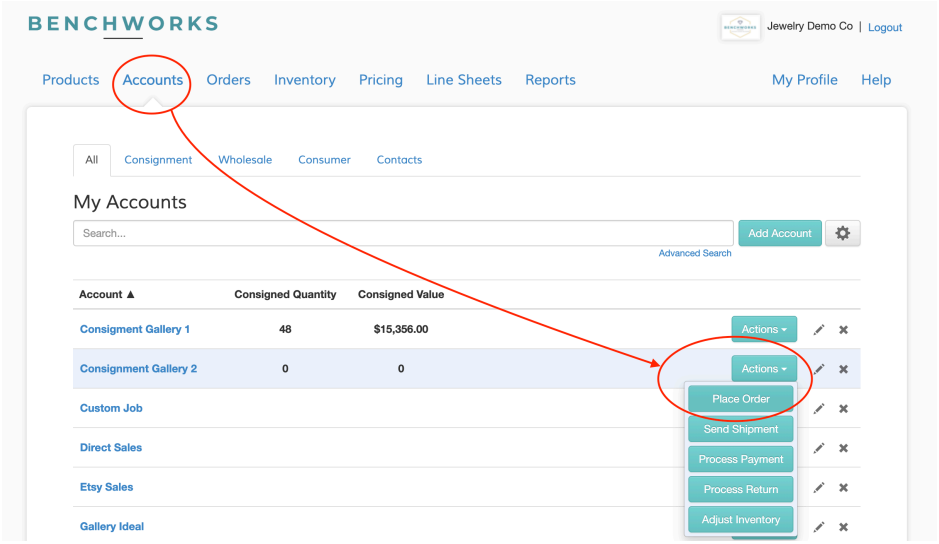
(Already have orders ready to sync? Skip to Step 3 below.)

Option 1: From the Orders Tab



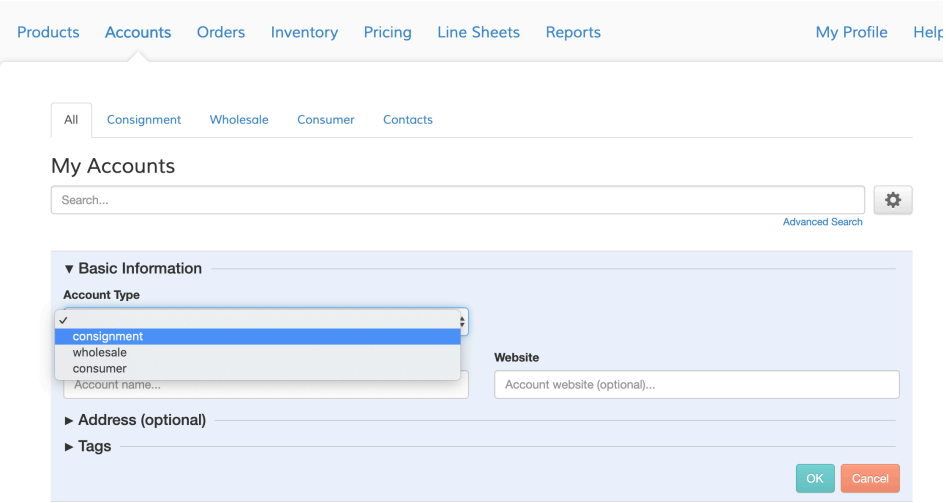
a. Under “My Pending Orders,” select the Account Name, then click the “Add Order” button. This will open an Order window.
b. Update the order date if it is not for today’s date.
c. Add the Products for the Order
d. Change the Quantity, and select Variations or add Custom Variations as Necessary.
e. Click “Place” in the bottom right of the window.
f. Confirm details are correct, then click “Generate Order Invoice” button.
g. Select the Default Invoice settings or configure the info for how you wish the invoice to appear. Click OK. This opens a PDF of the invoice that can be downloaded or printed.
h. Click the BenchWorks tab in your Browser to return to the app.

Option 2: From the Accounts Tab

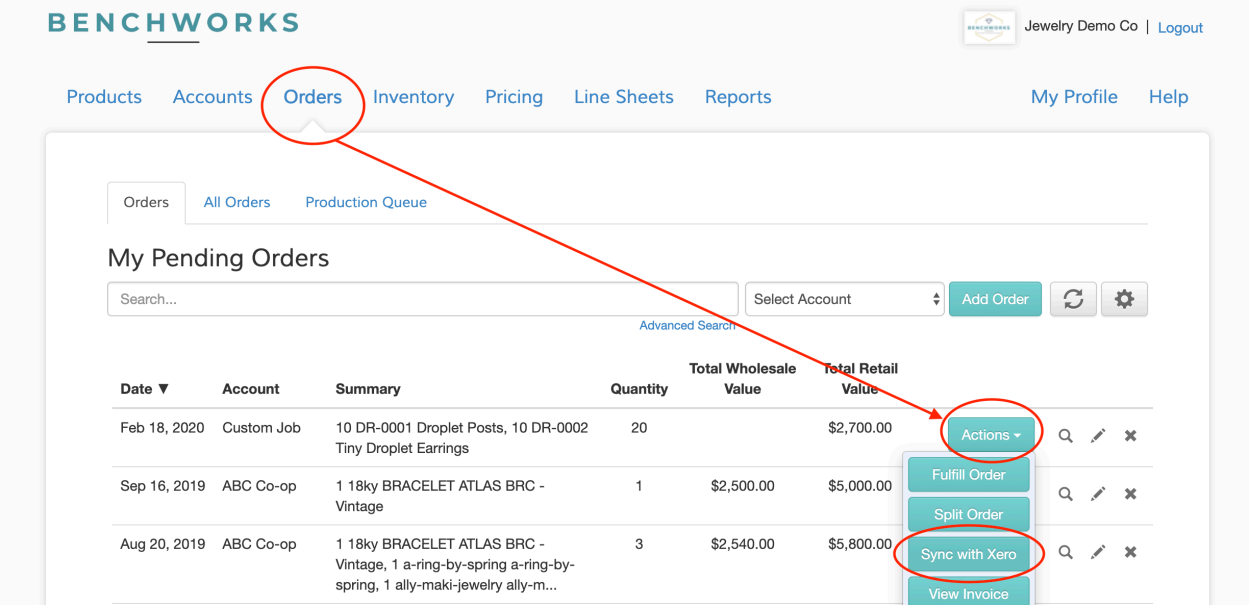


i. Next to the Account you want to place an order for, click the “Actions” menu button.
j. Select “Place Order” if you they have ordered the items, or “Send Shipment” if you are sending the items on Memo or Consignment*.
k. Follow steps b-h above.

*Note: Consignment Inventory is only tracked when using a “Consignment Type” Account in BenchWorks. The account type is selected when the Account is first added, but can be edited on an existing account.



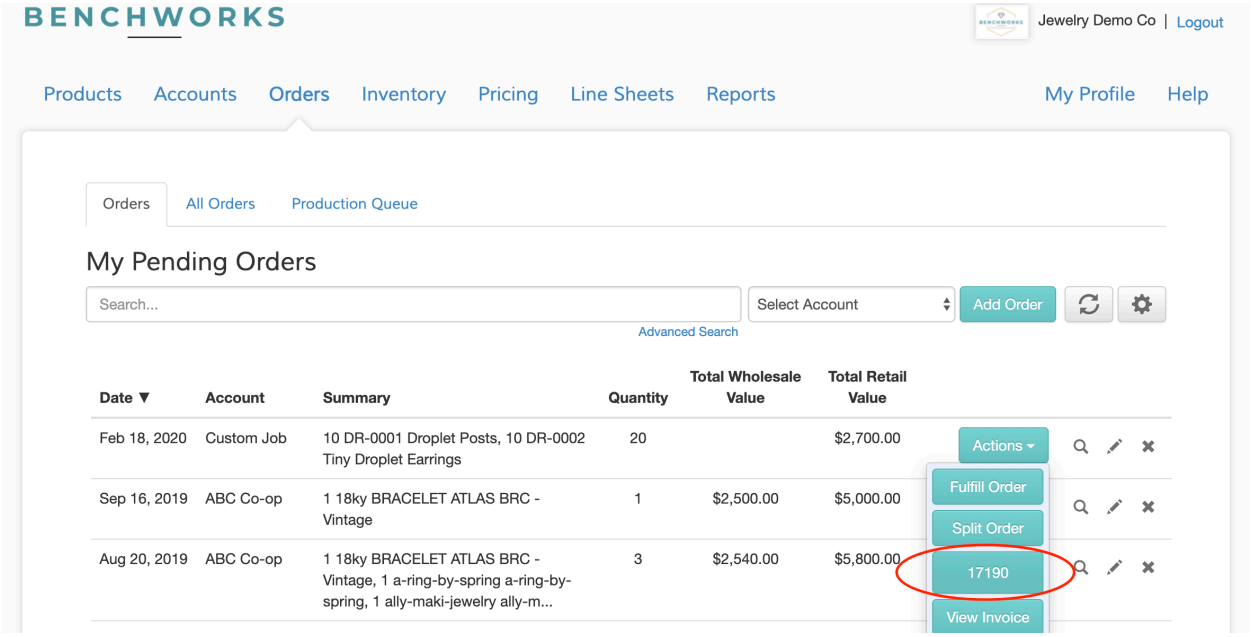
Step 3: Sync Order Invoices in BenchWorks to Xero



1. From the Orders Tab, click on the “Actions” menu button next to the Account Order you want to sync to Xero.

2. Click the “Sync with Xero” button.
3. The order is now synced.

Step 4: View the synced Invoice in Xero:



1. From the Orders Tab, click on the “Actions” menu button next to the Account Order that has been synced with Xero.
2. The “Sync with Xero” button has been replaced by the Invoice Number generated in Xero. Click on the button with the Xero invoice number.
3. This will take you to the Draft Invoice in Xero to further edit the invoice, Approve it and optionally email to your customer to receive payment online.
4. Click here to learn about accepting payments online with Xero Invoices.

Troubleshoot:

- Add a Contact Name to the Xero Invoice from a Generic Consumer account in BenchWorks. Example, we recommend Direct to Consumer customers are not created as one-off Accounts in BenchWorks; however, if you want to email the invoice to the specific customer or have record of their name in Xero, you can update this on the Xero Invoice.
    i. From the Order in BenchWorks, click the “Actions” menu, then click on the Xero Invoice number button. This will take you to the matching Invoice in Xero.
    ii. Click in the Contact Field to change what synced from BenchWorks. Type in the contact you wish to use to add or use an existing contact already in Xero.
    iii. Confirm the Invoice details are correct.
    iv. Click Save to confirm changes.

- Confirm the Xero Invoice has the right Tax Rate
    i. From the Order in BenchWorks, click the "Actions" menu, then click on the Xero Invoice number button. This will take you to the matching Invoice in Xero.
    ii. In the Tax Rate column, change the Tax rate if necessary to an in-state rate, or out-of-state tax exempt rate as needed.
    iii. Click Save to confirm changes.

- Disconnect from Xero
    i. From your Profile in BenchWorks, click on the Navigations tab.
    ii. Click the "Disconnect from Xero" button.

FAQ:

Can I batch sync invoices from BenchWorks to Xero?

No, only individual invoices can be sent to Xero from BenchWorks.

Do invoices automatically sync with Xero?

No, only the invoices you select to sync with Xero will generate an invoice in Xero. The purpose for this manual sync is due to our integration with Shopify, which also has a direct integration with Xero. We don't want you to duplicate Sales Invoices, so you have control over which invoices sync and which ones don't.

What information from my BenchWorks Order syncs to Xero?

The following data is automagically synced from BenchWorks to Xero when the Sync button is pressed:

1. Account Name = Xero Contact
2. Invoice Date
3. Invoice Number
4. Item Code
5. Item Description
6. Account Category
7. Tax Rate

If I have multiple products on an invoice in BenchWorks, will it be a summary or detailed invoice with the items in Xero?

The exact items will populate in Xero. Therefore, if you have an invoice with multiple products sold, multiple line items with these product details will populate in Xero.

How do I know if the Cost of Goods Sold Adjustment was recorded?

If you have the Cost of Goods Sold report enabled, then in Xero, navigate to the Business tab and select "Bills to Pay."

If needed, sort by the Date tab to bring the most recent bills to the top.
There should be a Bill with a contact of “COGS” and the BenchWorks Invoice number in the Reference.
Click on this bill to open it to confirm the cost of the item was appropriately recorded.

Need more help?

BENCHWORKS HELP DOCUMENTATION AND TUTORIALS ON YOUTUBE:
What is BenchWorks: https://www.youtube.com/watch?v=FzVC6KrZLHI&t=4s
Xero Sync: https://www.youtube.com/watch?v=hbH79ztAvXA&t=193s
All videos: https://www.youtube.com/channel/UCnq3gdjQsvU8inGXq4RB2zQ

Learn more detailed how-to instructions with step-by-step screenshots from the Help section inside you BenchWorks account: https://www.getbenchworks.com/my#/help/the-basics