XERO + MRA E-INVOICING

CLIENT GUIDE

codeblix

Turning ideas into impact.

Codeblix is a technology-driven company dedicated to building smart, scalable, and innovative digital solutions that empower businesses and create lasting value.

About this guide

This guide explains the client workflow for using Xero with Codeblix MRA e-Invoicing. After the one-time connection, almost nothing changes in daily work: invoices and credit notes continue to be created in Xero, while Codeblix works in the background.

The guide covers:

- the one-time Xero connection for each legal entity;
- the daily sales-invoice approval process;
- automatic MRA fiscalisation, PDF attachment and customer email delivery;
- credit-note handling and corrections; and
- what to send Codeblix when an invoice has an exception.

> Important: After setup, close Codeblix and continue working in Xero. You only return to Codeblix if support asks you to review a connection or exception.

> Xero security: Codeblix never asks for your Xero password. The Xero consent screen is the only place where you sign in to Xero.

Contents

1. What changes and workflow at a glance

Almost nothing changes in your daily work. You continue creating invoices and credit notes in Xero. Codeblix works in the background.

Normal sales-invoice flow

Daily workflow

Create the sales invoice in Xero

Check customer, tax rate, currency, description and amounts

Click Approve

Codeblix fiscalises the approved invoice with MRA

Fiscal PDF is added to the same Xero invoice

Codeblix emails that PDF to the customer

Status rule: Draft and submitted invoices are ignored. Only authorised sales invoices are processed.

What your team does

- Create the invoice in Xero.
- Check the invoice details.
- Approve the invoice.

What Codeblix handles after approval

- Fiscalises the approved invoice with MRA.
- Adds the fiscal PDF to the same Xero invoice.
- Emails the fiscal PDF to the customer.

2. One-time Xero connection

Complete these steps once for each legal entity that Codeblix needs to connect to Xero.

1. **Open Codeblix**

   Open https://codeblix.com/login using the private login sent by Codeblix.

2. **Choose the legal entity**

   Choose the legal entity at https://codeblix.com/companies/select, then open https://codeblix.com/settings/integrations and click Connect this company to Xero.

3. **Approve access in Xero**

   Xero opens. Sign in to Xero and approve the requested access.

4. **Select the correct organisation**

   Select the exact Xero organisation named by Codeblix.

5. **Confirm the organisation**

   Confirm the organisation. If you have more legal entities, select the second entity and repeat the same connection steps.

> After setup: Close Codeblix and continue working in Xero. You only return to Codeblix if support asks you to review a connection or exception.

> Password reminder: Codeblix never asks for your Xero password. Sign in to Xero only on the Xero consent screen.

3. Daily invoice steps

Create and approve sales invoices in Xero as usual. The key point is that Codeblix processes the invoice only after it is authorised.

1. **Create the sales invoice**

   Create the sales invoice in Xero as usual.

2. **Check the invoice**

   Check the customer, tax rate, currency, description and amounts before approval.

3. **Approve it**

   Click Approve in Xero.

4. **Codeblix processes it**

   Codeblix fiscalises the approved invoice with MRA, adds the fiscal PDF to the same Xero invoice, and emails that PDF to the customer.

Before you click Approve

- Customer
- Tax rate
- Currency
- Description
- Amounts

> Only authorised sales invoices are processed. Draft and submitted invoices are ignored.

4. Credit notes and corrections

When a fiscalised invoice needs to be corrected, use the credit-note or controlled-adjustment process rather than editing the fiscalised invoice.

Credit-note workflow

Create a sales credit note in Xero

Clearly reference the original invoice number

Authorise the sales credit note

Codeblix fiscalises it as a credit note

> Do not edit a fiscalised invoice. Correct it with a credit note or an approved controlled adjustment.

Key points

- The credit note must be an authorised sales credit note in Xero.
- Clearly reference the original invoice number.
- Codeblix fiscalises the authorised credit note as a credit note.

5. If something is wrong

> Do not resend or recreate the invoice immediately.

Send Codeblix the following two items:

1. **Xero invoice number**

   Send the Xero invoice number that has the issue.

2. **Screenshot of the status**

   Send a screenshot showing the invoice status.

What Codeblix will check

- whether the invoice is waiting for contact mapping;
- whether it is waiting for tax mapping;
- whether MRA reconciliation is pending;
- whether the fiscal PDF attachment is pending; or
- whether customer email delivery is pending.

Final summary

Connect each legal entity to the correct Xero organisation once

Continue creating and approving invoices in Xero

Codeblix handles MRA fiscalisation, PDF attachment and customer email

Use an authorised credit note for corrections

If there is an exception, send the invoice number and status screenshot to Codeblix