Changes to Xero Integration

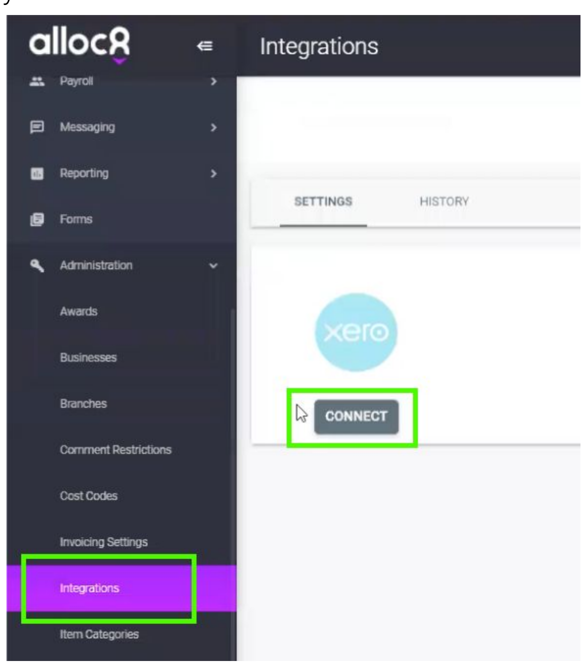
Release Dates
New customers: September 17, 2020
Existing customers: September 22, 2020

Overview

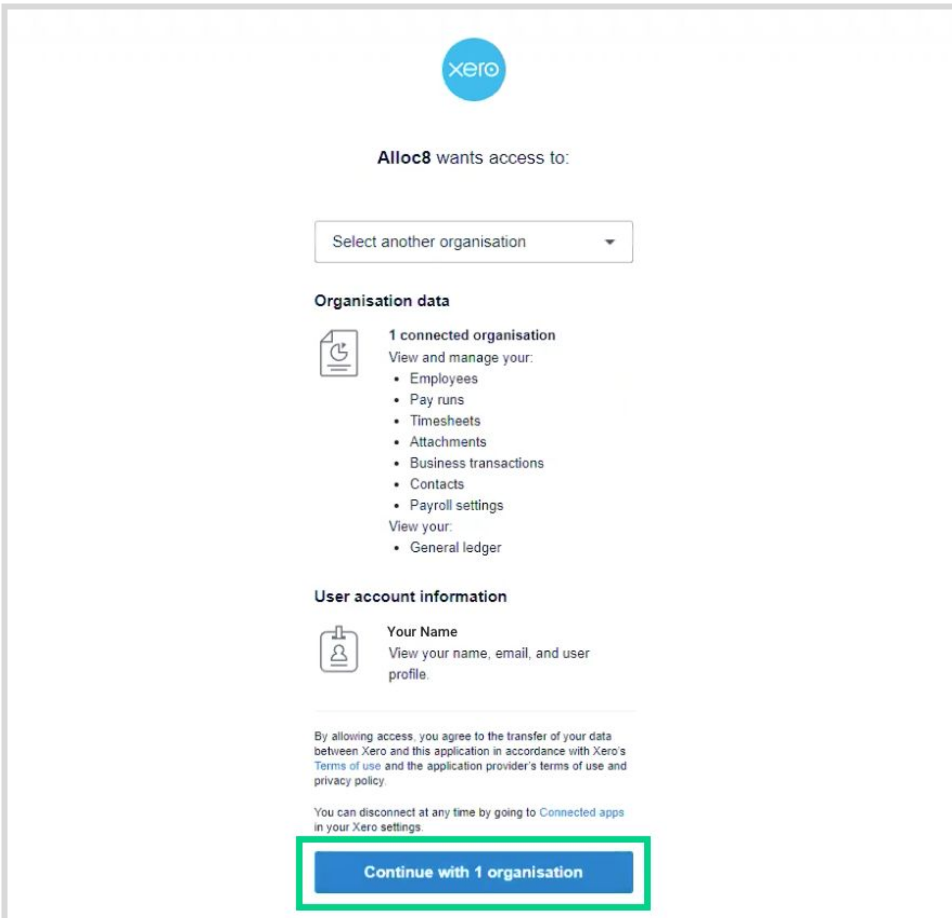
This release in Alloc8 introduces connecting to Xero using OAuth2. It changes the way current users connect to Xero, and also enables new users to connect to Xero themselves. There are also changes to how you match Employees and Contacts to your Xero account.

Step 1: Reconnect to Xero

1.1 Under the administration menu, you will see a new tab called 'Integrations'. Click on this page and you will see a 'Connect' button under the Xero logo.

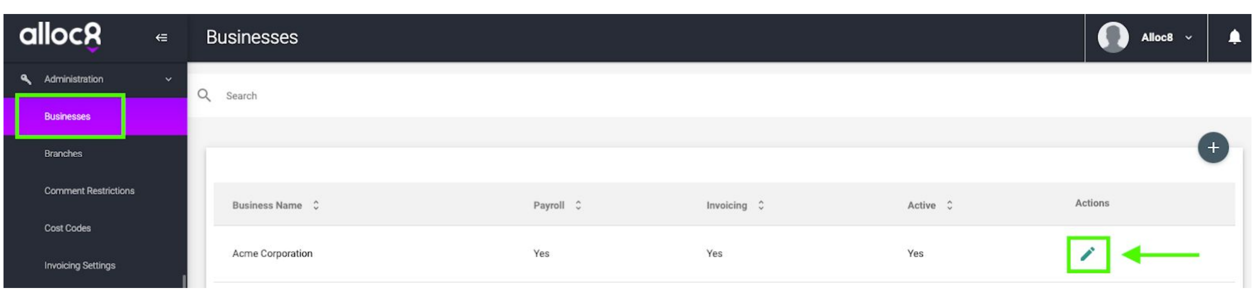


1.2 You will be redirected to an authentication page. If you are connecting for the first time, you will need to log in with your Xero Username and Password. If you're an existing user, you will just need to confirm again on this page.

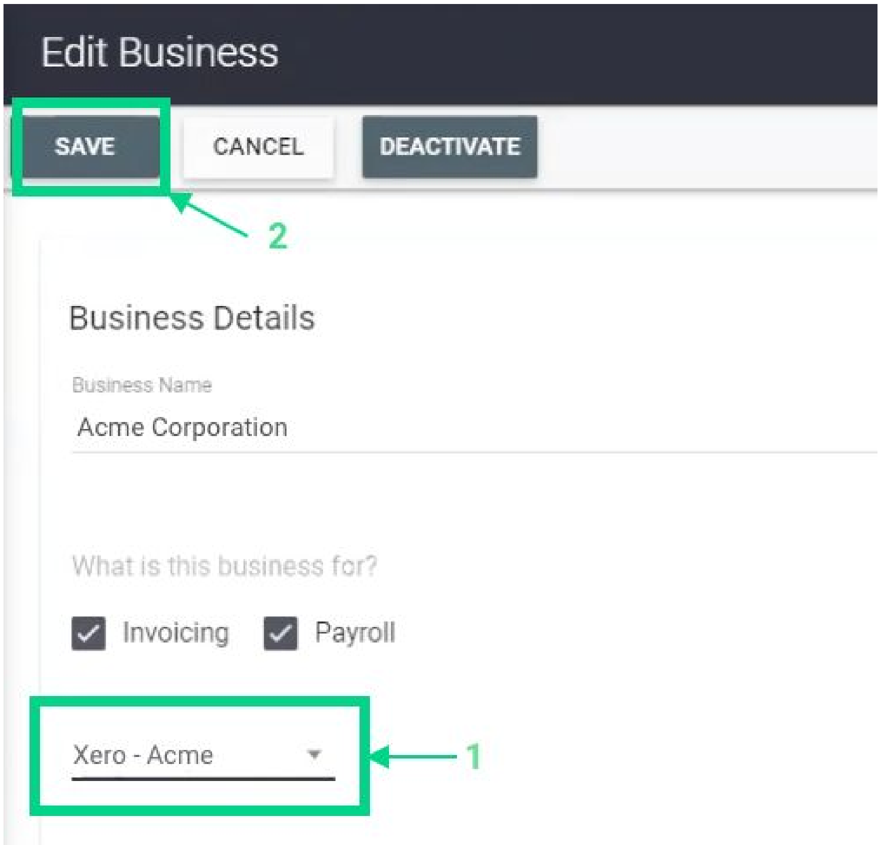


Step 2: Relink your Xero account to your Business

2.1 Under the Administration menu, select the 'Businesses' tab. Click the 'Edit' icon next to your business.



2.2 Under the 'Export To' drop down field, reselect your Xero account. Then click 'Save'



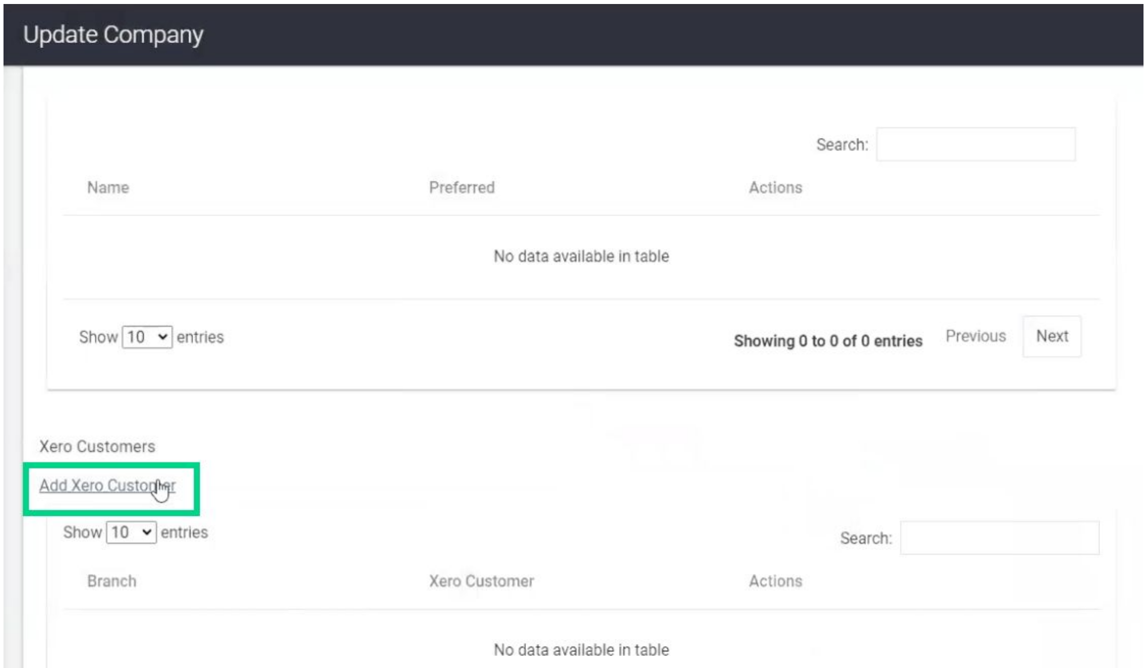
2.3 If you have more than one business, repeat this process for all of your businesses.

The businesses will remain linked to your branches as they are currently. You do not need to reselect the business again on the Branch page.

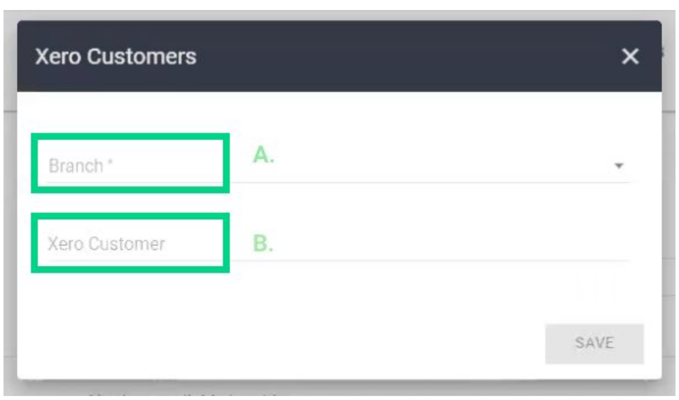
Step 3: Match your Client Companies in Alloc8 to your Xero Contacts

This section replaces the current 'Xero Contact' dropdown on the Companies pages. If you are an existing customer, you will not need to do this step. If you have only connected to Xero for the first time, however, you will need to match all companies you want to export invoices to Xero for.

3.1 Go to the Company you want to match and click 'Edit'
3.2 Scroll down until you see a new section called 'Xero Customers' (see next page)



3.3 Click ‘Add Xero Customer’
On this dialog, you will see two fields:
A. Branch Dropdown: This will load all branches your company belongs to (this information can also be found in the Company details at the top of this same page)
B. Xero Customer: This dropdown will load all of your Xero Customers



3.4 Select a Branch, then select a Xero Customer and click SAVE. If the company belongs to more than one branch, you will need to repeat this process for all branches*. You can only select one Xero Customer per branch.

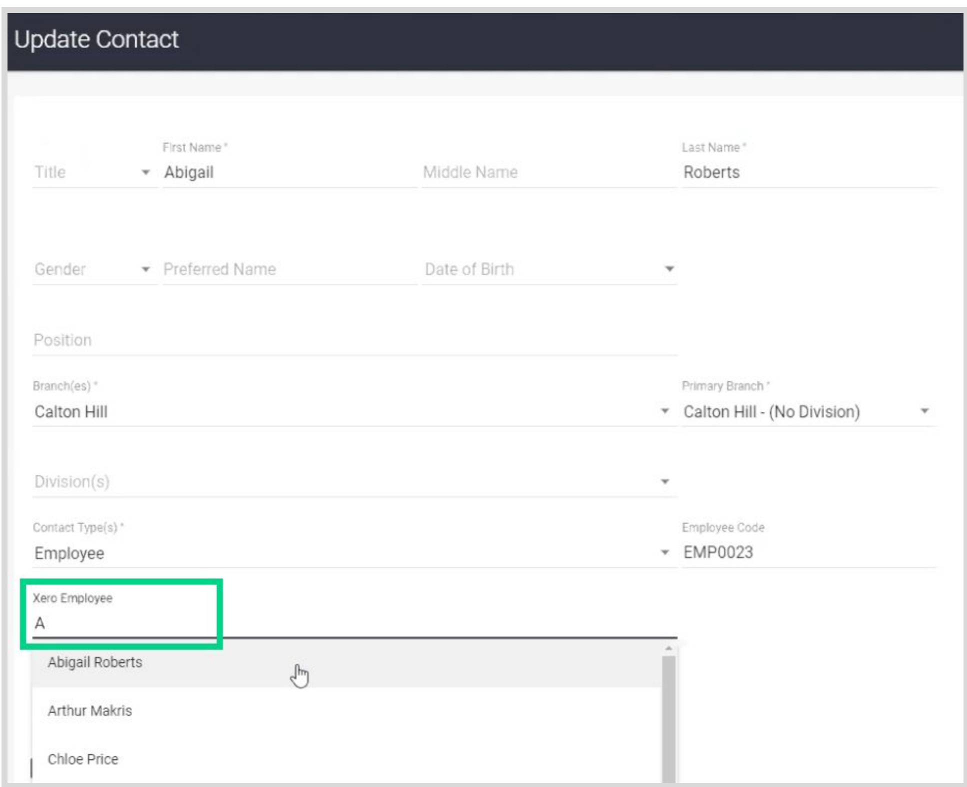
***Why do you need to do this step?**
In the future you will be able to connect to more than one Xero account and export invoices from different Branches to different Xero accounts using the Businesses feature. When this is released, you will be able to load a different list of Xero contacts depending on what account each Branch is connected to.

Step 4 (optional): Match your Employees in Alloc8 to your Employees in Xero

This section is new. The current way Xero exports to Payroll is by looking at *Employee First Name* and *Employee Last Name* in both Alloc8 and Xero. If a match is found in Xero, payroll will be exported to this contact. This new section allows you to choose the exact Xero Employee to match, as well as the ability to handle employees with the same first and last name.

Important note for new and existing customers: The current Xero functionality as outlined in the start of this section still works. You DO NOT need to rematch every individual employee prior to your next payrun. In an upcoming release (October / November 2020), this functionality will be phased out and we will introduce an 'Automatch' page that will allow you to map all employees from a single page. Your CSM will explain this further to you closer to the next release.

4.1 Go to your contacts page and click 'Edit' next to the Employee you want to match.
4.2 You will now see a new drop down menu called 'Xero Employee'. Selecting this dropdown will load a list of all of your Employees in Xero.



4.3 Once you have selected an Employee, click **SAVE**.