blue camroo

Integrations

User Guide

Accounting Systems

xero

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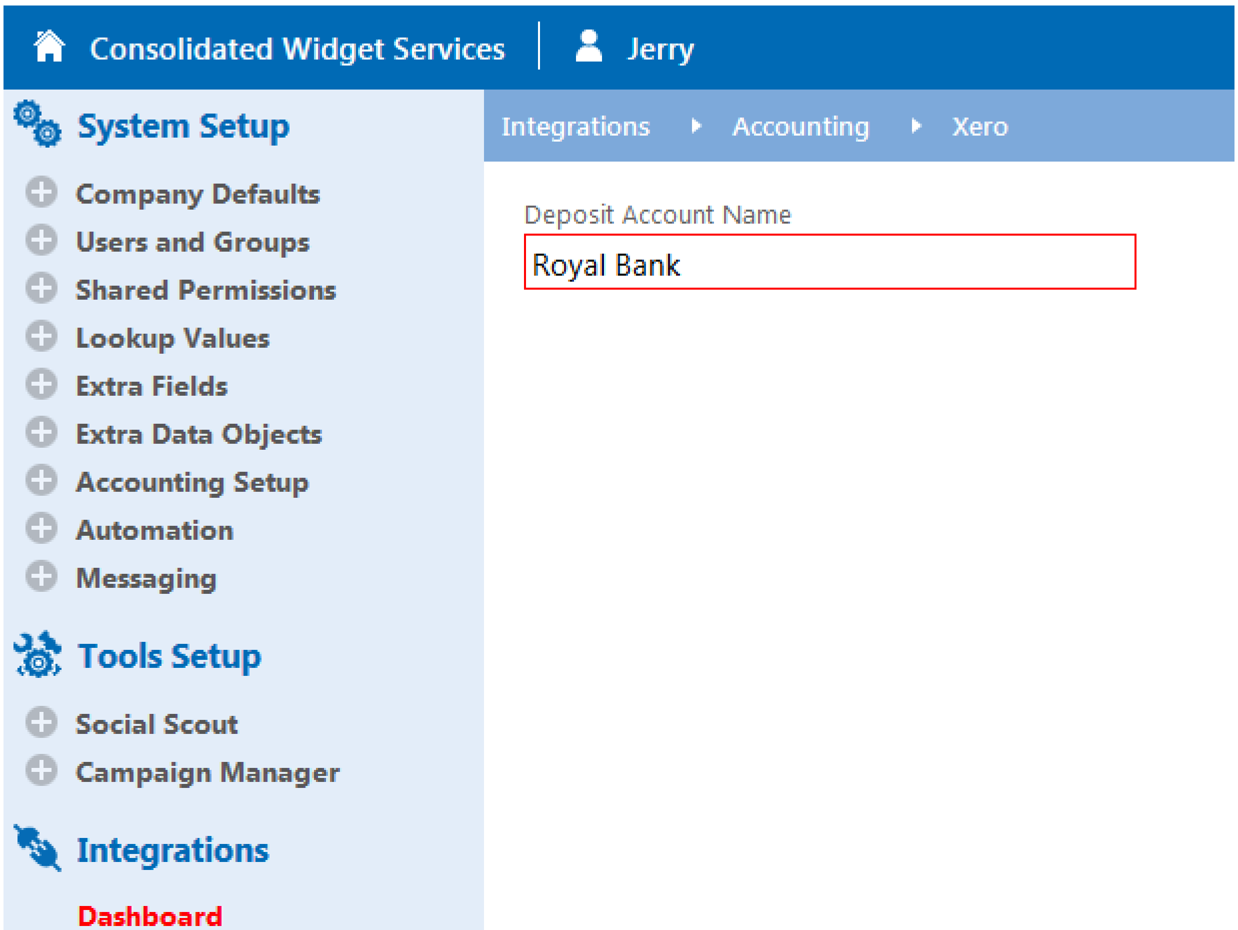
Xero Connectivity

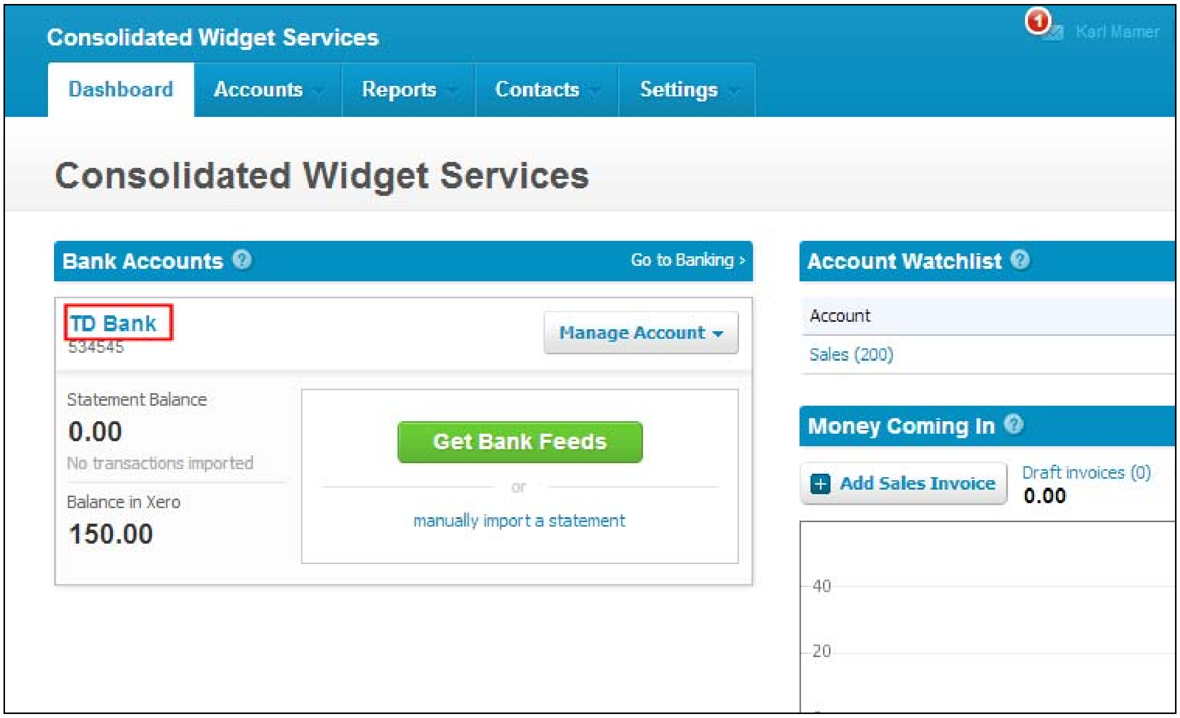
This setup guide assumes you already have a Xero account and customized it for your business. This guide will show you how to modify BlueCamroo so it can post invoices and payments to your Xero Deposit Account.

1) Access **Setup > Integrations > Dashboard** and then click on the Xero logo under the Accounting section.

1. Select the **Xero** option. If you do not see a Xero option, contact support@bluecamroo.com and request this feature be activated. Return to this step after activation and continue.



2. On the **Setup** screen enter the Deposit Account's name. This must match exactly a Bank Account you have setup in Xero. This will be the account into which payments are deposited.

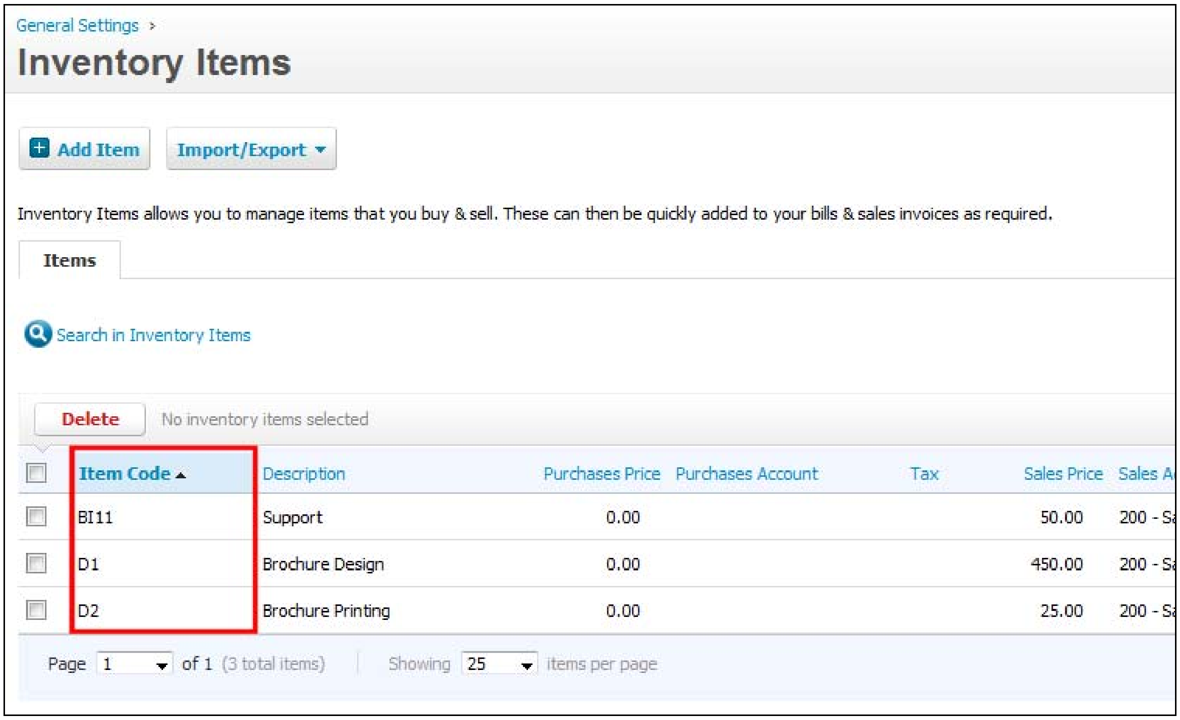


3. Click **Activate**.
4. Follow Xero's authorization steps.
5. Return to BlueCamroo's Xero setup page and click **Save**.
6. **And stop for a moment!**

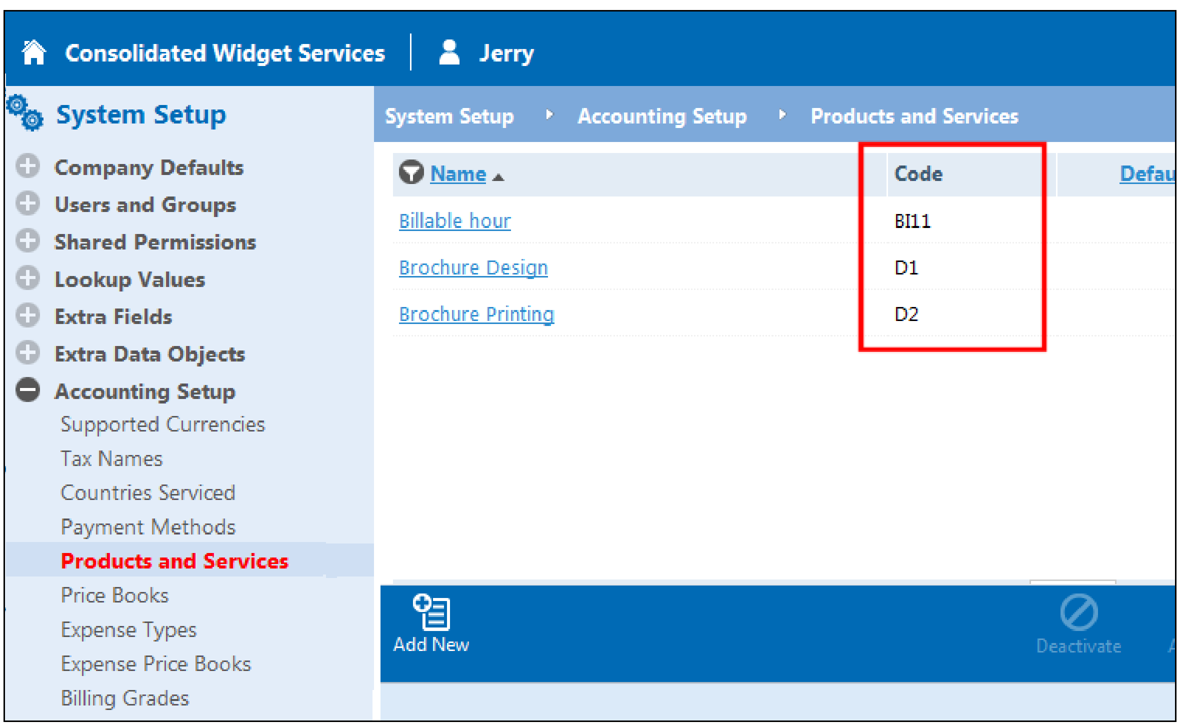
   Do not click **Synch Now** just yet. You need to verify your BlueCamroo Products and Services, Taxes and existing Customers match what you have setup in Xero. If there are any differences, follow the steps below to adjust BlueCamroo to match the text/product codes and the customer names you've set up in Xero.

Aligning Products, Services and Taxes between BlueCamroo and Xero

If you have Products and Services already entered into BlueCamroo **and** inventory items in Xero, you'll need to unify how you handle Products and Services in BlueCamroo with your Xero Inventory Items.

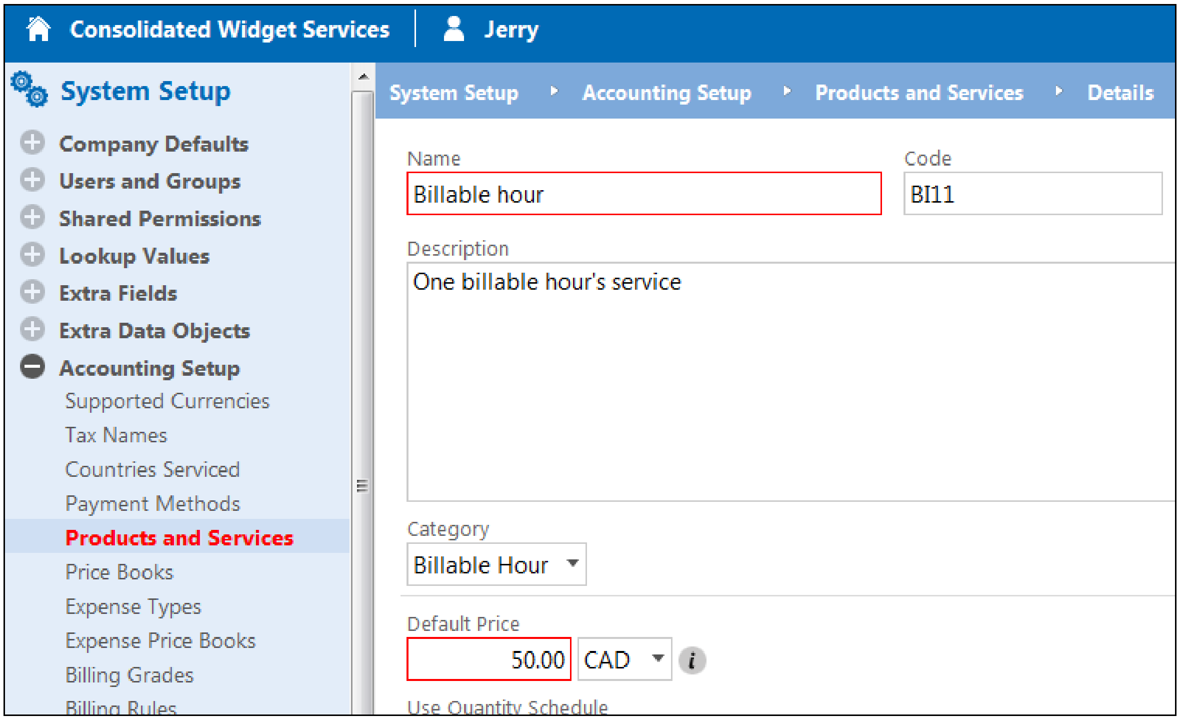


Xero invoices by **Item Code** whereas BlueCamroo invoices via the product name. It's important to ensure each of your BlueCamroo products have completed code fields and they match the **Item Codes** in Xero. Also, each inventory item in Xero **must** be associated with a Sales Account.



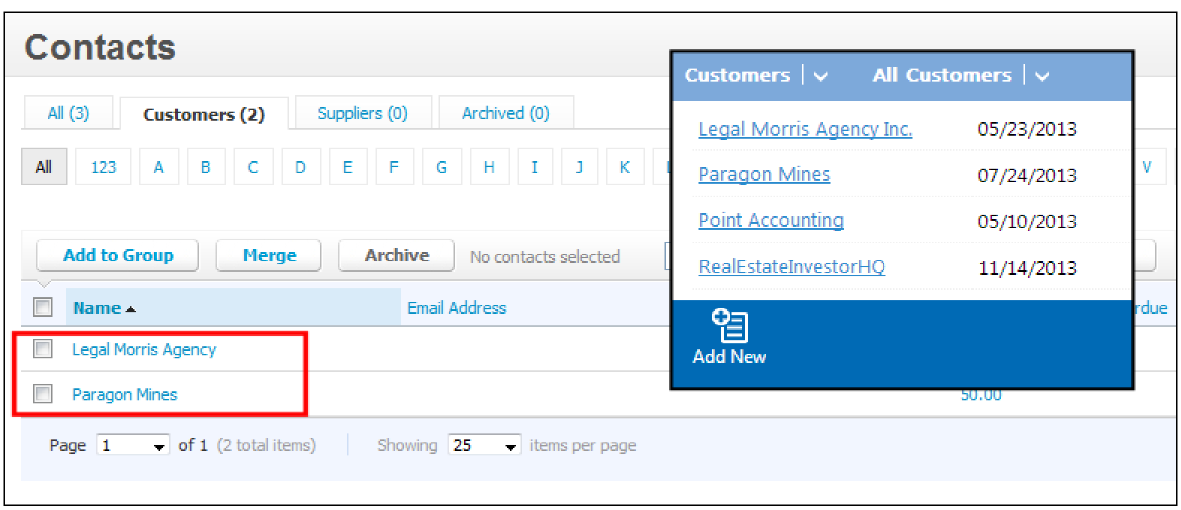
To change your product codes, click BlueCamroo's **System Setup > Accounting Setup > Products and Services**. Click on a product name and adjust the **Code** field to match the Item Code in Xero.

The Tax Code in BlueCamroo **must** also exactly match the Tax Name you've set up in Xero.



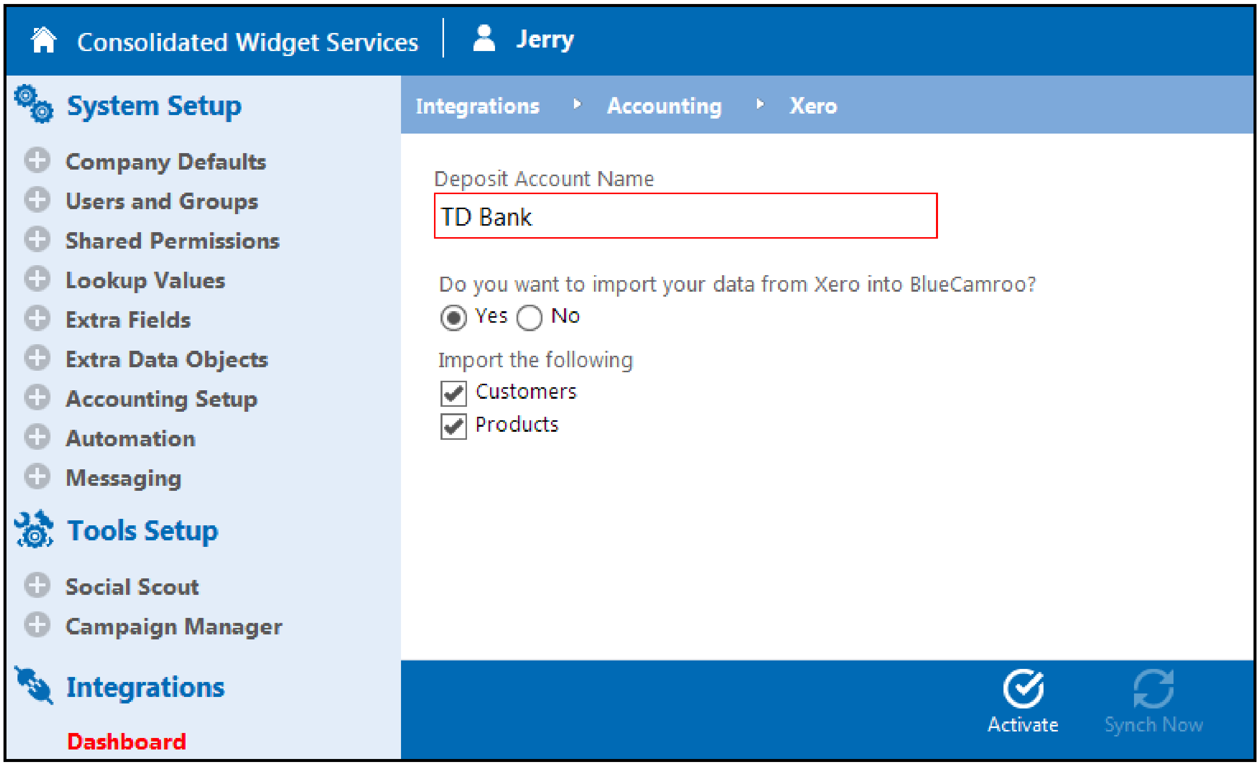
Do you already have Customers in BlueCamroo?

If you have **Customers** in Xero and **Customers** in BlueCamroo and they represent the same person or organization, ensure BlueCamroo's **Customer** name matches exactly the name you have in Xero.



When BlueCamroo connects with Xero and posts an invoice, if it finds an identical customer name, it will associate the invoice with that Xero customer. If it finds no exact match, it will create a new customer account in Xero. Hence, if your BlueCamroo customer is called *Paragon Mines Ltd.* and your Xero customer is called *Paragon Mines*, change the BlueCamroo name to *Paragon Mines*.

Getting Xero Customers and Inventory Items into BlueCamroo



The first time you synch BlueCamroo and Xero, BlueCamroo will prompt you to import Xero inventory items and their item codes into BlueCamroo. You do not have to manually re-enter your Xero inventory into BlueCamroo. Also, BlueCamroo will import Xero customer records not found in BlueCamroo. BlueCamroo will create an organization record for your Xero customer records and flag those organizations as being customers. Contacts listed in your Xero customer record will get created as Person records in BlueCamroo and associated with the appropriate organization record as a customer contact.

This only happens for the first synchronization. Future syncs will not bring in changes to addresses. New customers in BlueCamroo will be created in Xero if they cannot be found.

When to Synch

After you've ensured your BlueCamroo details match your Xero setup, you're ready to **Synch**. You will want to synch when you have used BlueCamroo to send a customer an invoice (via the **Print** button) and/or when you're recorded a payment on the invoice in BlueCamroo. BlueCamroo will not synch invoices you've created but not sent to a customer contact.

Note: Synching is only one way. Invoices and payments added in BlueCamroo get reflected in Xero. Invoices, payments, and new customers entered into Xero will not get entered into BlueCamroo.

Ready? Time to Synch

1. Visit **Setup > Integrations > Dashboard >** and under the Accounting section, click on the Xero logo again.
2. Xero only allows a third party application to be active for 30 minutes. If the Activate button is undimmed, you'll need to click it again before you can click S**ynch Now**.

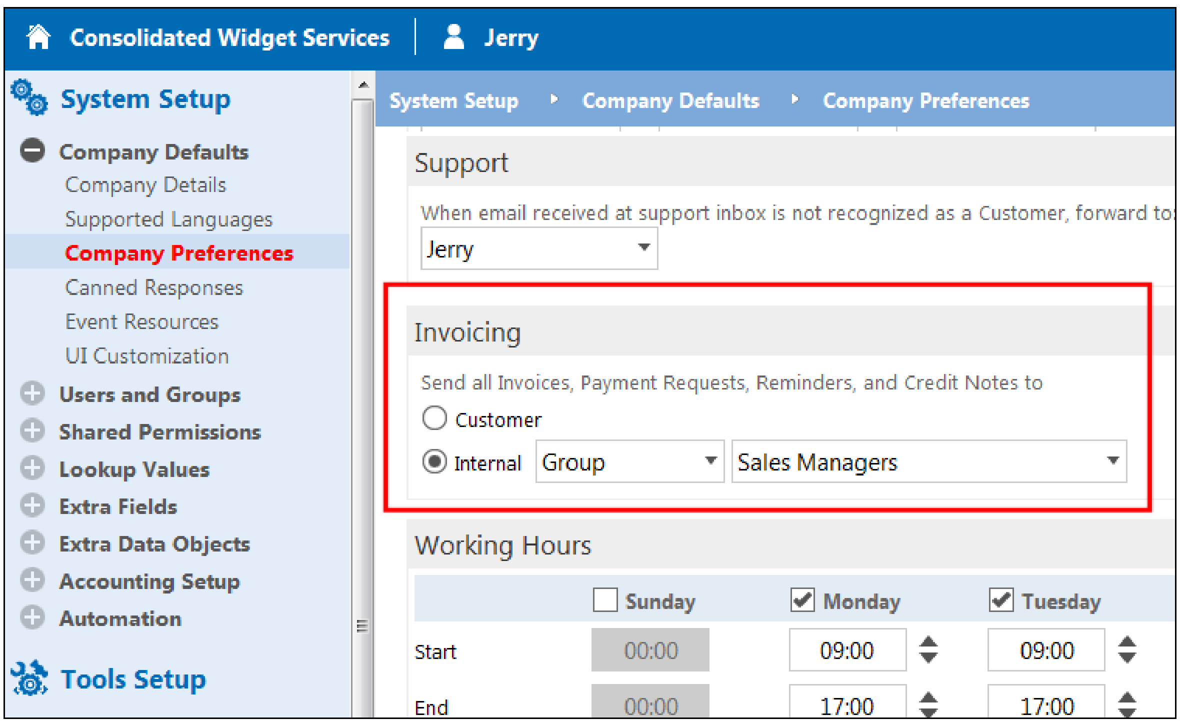
3. Click **Synch Now** when the button undims.
4. Check Xero to ensure the invoice has posted or the payment has been recorded.

Draft Invoices

BlueCamroo only synchs invoices sent to the client via BlueCamroo. When you click the BlueCamroo invoice's **Send** button, BlueCamroo sends a pdf of the invoice to the client and gives the client payment options within BlueCamroo. It also flags the invoice as being sent to the client and ready to synch into Xero.

Some companies prefer Xero to handle sending invoices to the client and deal with payment. To do this, BlueCamroo allows you to disable the sending of invoices to clients. To disable sending invoices to clients:

1. Visit **Setup > System Setup > Company Defaults > Company Preferences**.



2. In the Invoicing section, select the Internal radio button. Select which internal user or group the invoice should be sent to instead.
3. Click **Save**.

You can now click the BlueCamroo invoice's **Send** button to flag the invoice as ready to be synched to Xero. The invoice will be sent to the identified BlueCamroo internal user for his/her reference and sent to Xero for posting to the proper customer. From Xero you can then send the client the invoice and let Xero handle the payment side.

Remember, if you don't disable customer invoicing in **Company Preferences** and you use Xero to send the invoice to the customer, the customer will get two invoices and conflicting payment instructions.

Do More with BlueCamroo