

# xero

# **Integration Guide**

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### Setup

 Once the Xero Beta integration has been enabled for your system you will see a new menu item on the Admin page:



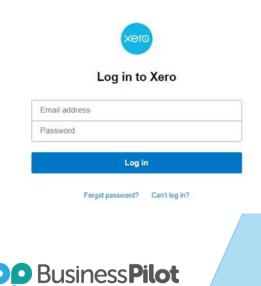
• The next step is to link your BP system to a Xero account. You can do this by clicking on connect here:

P	System Integrations
0	FENSA
	Xero

Step 1: Connect Your Organisation To Xero



• You will then be asked to login to Xero:



• The next step will confirm what permissions Business Pilot requires in order to access your Xero data. If you are happy click on Allow Access.



Business Pilot CRM wants access to:

#### Organisation data Demo Company (UK) View and manage your: File library Organisation settings Attachments Business transactions Fixed assets Contacts View your: · Reports General ledger User account information View your name, email, and user profile By allowing access, you agree to the transfer of your data between Xero and this application in accordance with Xero's Terms of use and the application provider's terms of use and privacy policy. You can disconnect at any time by going to Connected apps in your Xero settings. Allow access Cancel

• You should then be redirected back to the Xero Settings page in Business Pilot where it should show the following:

Step 1: Connect Your Organisation To Xero

× Disconnect

CIS is not enabled for Sub Contractors



Note the line about CIS not being enabled for Sub Contractors. This is picking up on a setting inside of Xero that allows you to post invoices with CIS deductions on and Xero track these through a specific CIS Labour Income account (210).

See <u>here</u> for details about how to enable this in Xero. Once configured it will display the following:

Step 1: Connect Your Organisation To Xero



• The next step is to sync your Xero account code with BP nominal codes:

Step 2: Sync your Xero account codes with BP
Sync Accounts



 This will attempt to match nominal codes in BP with Account Codes in Xero. Hopefully you have these mostly in line already. The system will give you a summary of what it has done by saying from X accounts in Xero Y account were matched to ones in BP. If there are unmatched codes you can then open a new tab and go to the BP Admin Menu and select under Finance, Nominal Codes.

	Name 🍸	Country 7	Sage Code 🌱	Current Rate	Reverse Charge?	Reverse Charge Rate	Active?	Connected to Xero 🌱	Xero Revenue VAT Code	Xero Expense VAT Code
1	то	United Kingdom	то	0%	×		× .	~	Zero Rated Income	Zero Rated Expenses
1	TI	United Kingdom	т1	20%	×		~	~	20% (VAT on Income)	20% (VAT on Expenses)
	T5	United Kingdom	т5	5%	×		~	~	5% (VAT on Income)	5% (VAT on Expenses)
I	17	United Kingdom	Τ7	0%	×		~	~		EC Acquisitions (20%)
	Т9	United Kingdom	Т9	0%	×		~	~	No VAT	No VAT
I	T16	United Kingdom	T16	20%	×		~	~		Zero Rated Expenses
I	T18	United Kingdom	T18	20%	×		~	~		Zero Rated Expenses
I	T21	United Kingdom	T21	0%	~	20%	~	~	Domestic Reverse Charge @ 20% (VAT on Income)	Domestic Reverse Charge @ 20% (VAT on Expenses)
I	T26	United Kingdom	T26	0%	~	5%	~	~	Domestic Reverse Charge @ 5% (VAT on Income)	Domestic Reverse Charge @ 5% (VAT on Expenses)
I	то	Ireland	то	0%	×		×	×		
I	т1	Ireland	т1	23%	×		×	×		
I	тз	Ireland	тз	14%	×		×	×		
	1 +	H 20 V items	s per page							1 - 12 of 12

• We can see here that our Nominal Code of 400 isn't connected to Xero. If we click on Edit, we can then select the specific Xero Account Code that we want our one in BP to match up to.

	Name	T Emerary	Y Sage Code	T Current Rate	Y Reverse Charge?	Y Reverse Charge Bate	T Activa?	Y Conversed to Xero	Y Sers Revenue VAT Code	Y Kerp Espanse VAT Code	
1	το.	United Kingdom	10	2%	*		~	~	Jaco Reset Income	Zero Recei Esperaen	
1	τı.	United Kingdom	71	20%			~	~	20% (KAT on Micame)	20% (VAT on Expense)	
1	75	Orned Kingdom	15	9%			~	*	5Hs (VAT on Income)	5% (VAT on Expenses)	
/	π	United Kingdom	17	26			~	-		BC Acquisitions (20%)	
/	79	Onced Grigdom	79	2%			*		No V87	N3 VK	
/	716	United Kingdom	716	205			~	-		Zaro fatasi Espansas	
/	118	United Kingdoni	118	20%			~	~		Zero Rined Expenses	
/	725	Groud Grighten	121	25	~	20%	~	-	Domento Receiva Charge @ 20% (DAT on Income)	Domantis Revenue Orange (§ 20% (VAT an Expenses)	
/	126	Unded Kingdom	126	0%	~	25	~	~	Correstic Revenue Charge @ 5% (VKT on income)	Domestic Revenie Charge @ 2% (VAT on Expenses)	
/	10	Inland	15	2%	*						
1	τi	heard	<b>#1</b>	22%	*		*				
7	13	Indana	13	145			*				



• Once saved it will show the account is connected:

Coole 1	T 101	• •	No: Suppliers	Y For Commer Holdard	T for Cultoner Paynetts?	Y Mennai Cost	Y Sales Calif	Y Survey Cost?	Y Religious	Y Annahour	T ADHO 1	Contected to hero	Y Yers Account Codeman
4000	4000			*	*						¥	~	Seles (200)

 Now returning to your Xero setting you can start Step 3 to sync VAT/Tax codes between the two systems:

Step 3: Sync your Xero tax codes with BP

Sync Tax Codes

The system attempts to match the standard VAT codes between the systems and relies on the names of the Tax codes not having been altered in Xero from the default names.

A message will be shown detailing what has been matched. You can check this by (in a new tab) going to the Admin Settings page and then under the Finance section click the VAT codes link.

Here you can see all VAT codes in BP listed along with their rates and also then whether they are linked to ones in Xero.

Note that the T21 and T26 codes weren't linked initially. This is because the Xero system we used here didn't have domestic reverse charging enabled. To enable them in Xero please visit <u>here</u> for details.



You can then always go back to step 3 and rerun the sync so that the codes would now look like:

Manage VAT Codes

	Marrie	T Courty	Tage Linds 7	Current Rate	T Asserts Charge?	Teverse Diarge Rate	T Actual	Connected billions	T Area Revenue and Code	<ul> <li>Xeru Expense XXT Code</li> </ul>
1	-	United Kingdom	ta .	- 04	*		4	~	Zen handonske	Jaco Salid Experials
1	35	Urbad trighters	38.1	209			~	~	20% (ANT (or inclume)	20% (exit on Expense))
/	15	United Kingdom	15	296			~	*	5% (URT or resorve)	294 (NAT an Experime)
1	12	United Kingdom	12	.01			~	~		BC Acquiations (20%)
1	10	Under/Angeloin	19	04	×			~	And that	16.0 WHF
1	216	United Kingdom	14	20%			~	~		Dena Ratical Expansion
1	.718	United Kingdom	118	20%	*			~		25r/s Rated Expenses
1	321	United Kingdom	101	-	~	204	~	~	Demetti Aesene Olarga gi 20% (Af on income	<ul> <li>Dorrestic Receipe (2) 20% (oN1 on Experise))</li> </ul>
1	120	United Krighten	129	-	~	240	~	~	Durnetic Revenue (Harge & Shi)(M or House)	Domentis Revenue Charge (± 3% 2047 on Expenses)
1	10	related	10	0%			4			
1		reard	10	22%	*					
2	10	intend	12	546						

- Another feature we added was the ability to rename the default VAT codes, so if you didn't want to call it T1 you are able to change this. You can also disable VAT codes if they are not used by your company.
- Returning to the Xero settings page you can proceed with Step 4:

Step 4. Sync your Xero contacts with 8#	
Syme Conducts	

• This will attempt to match existing contacts in BP with those in Xero. This is done by using the Account Reference field of the contact and matching to the same reference in Xero.

If you haven't been using Account References contacts would need to be linked manually otherwise when you next were to add an invoice or expense a new contact in Xero would be created. These can however be merged in Xero at a later date.



• Finally, step 5 gives you a few controls on how the integration operates:

fault Branding Theme	Default Due Date (Number of days post invoice date)		Default Invoice Status On Creation	
- Select		:	Select-	

- The first setting Default Branding Theme relates to how your invoices appear when viewed in Xero. This is not needed for BP and BP uses its own templates to create and send invoices to customers. In the vast majority of cases this would be set to standard.
- The second setting allows you to set a default number of days to say when an invoice is due post the raise date. Leave this as 0 days to have the invoice due on the raise date. The last setting controls the state of invoices when they are added to Xero. The options are:
  - Draft this allows you to inspect the invoice and then submit and approve the invoice (doesn't affect the customer account or ledgers until submitted)
  - **Submitted** the invoice still must be approved but the values in the invoice are live in relation to customer accounts and ledgers
  - Approved the invoice is automatically approved and live straight away with no additional user input required in Xero.
- Due to the way Xero works if the setting is set to either Draft or Submitted, credit notes cannot be applied to invoices that are not approved so please be aware that if you are operating in either of these modes that functionality would not be available.
- Once you are happy with your settings, please click update to save them.

Business **Pilot** 

### Contacts

- As mentioned in the setup process the contacts are sync'd between system based on the Account Number/Reference.
- Xero holds a Sales number of days and a Bill number of days per contact. When we sync contacts it will attempt to pull this. So if the contact is a Supplier it will attempt to pull from Xero the Bill number of days and for anything else it will pull the Sales one. If nothing is set in Xero it will leave it blank.
- If the contact is updated in BP and this date added it will also update the value in Xero for the contact. However this isn't a vice versa, so if its updated in Xero it won't reflect in BP.
- When an invoice (or supplier invoice) is created in the system it will firstly check to see if the contact has this value set . If it does it will add the number of days on to the raise date for the due date of the invoice. If it doesn't have it set it will default to the global setting in the Xero settings page.



• To manually link a contact you can do the following. Firstly click edit on a contact:

Edit Contact	Leads Contracts Templates						Contact Number: 181 BP Email: a-181-AAAB@b 🖗
Contact Decision Activity	Leads Contracts remplates						
Key Info	60 Merge 0	Contact	Address		٠	Notes	
Contact Type	Customer		Address 1	Unit 4D		Date Added 16/08/2021	
Retal/Trade?	Ratail		Address 2	Penn Street Works		Permanent Note	
Salutation	Ms & Dr		Address 3	Penn Street		8 / U 8 8 8 (E E 0	• = *
First Name	Julie		Town	Amersham			
Last Name	Stephens		County	Buckinghamshine	٠		
Company Name			Postcode	HP7 OPX	۹		
Main Number	2 01494 211 152 (Mr)		Country	- Select -	•		
Mobile Number	2		Accounts Reference	STEP001		Tags	
Alt Number	J		Marketing	Email X Phone X			
Email	e rebecca.taylor@businesspi Home	×	Send Customer Review	No			

 In the top right corner of the page of the contact that isn't already connected to Xero you will see a Xero logo with a link to click connect:

Connect To Xero		×
Account Reference		
STEP001		
Select Existing Xero Contact		
- Select -		.*
	OR	
Create New Contact?		
		Cancel
Business <b>Pilot</b>		Xero Integration Guide

 Here you can set the account reference if one hasn't already been generated by BP and then either choose to link this BP contact with an existing contact in Xero or create a new contact in Xero. Below is an example of creating a new contact:

Connect To Xero	×
Account Reference	
STEP001	
Select Existing Xero Contact	
- Select -	•
OR	
Create New Contact?	
Yes	

Once connected the display in the contact will show:

Cancel

Connect



• You can then go over to your Xero and find the details of the contact and see that it is now in that system.

Ms & D	r Julie Steph	ens					
New (							D Optime + Em
	and the second second	hflow with this contact opend and receive with the ty bests.		Contact Details Account Number STEP001 & Contact Person July Stephens El Inforce Steptenspect or uk			
Money and over last 12 months .							L_ E1EM 211 M2 (M) Contact Code 57504 V. Postel Astrono Attention: Auto Stephenes Unit 4D
New Der Jah	THE HAR	. w	10 J		54	- 94	Frank Street Warks Parts Street Amersham
ctivity Noton Email						Add a runo	Bucklingbareshira HDT (DN) Mean Map
1128	WINDEN	RETERENCE	DATE	ACTIVITY DATE +	DMC -	RETIRAL.	
Created By System Canazated Als & Dr. Julie Sighteen has been created			27 Oct 2022	Juli tem			Financial Details Datait Carrieg GBP British Proved
dal berixi							

• Any changes that you make to the contact will then be reflected in the contact in Xero.



### **Customer Invoices**

- Once you create a raised invoice for a contact then the system will firstly check whether the contact has been linked to Xero or not. If not it will firstly add the contact and then the invoice.
- You create invoices in the same way that you normally do in Business Pilot. As an example, lets create a deposit invoice with today's date as a raised date:

Joh Valor	(Net)	To Mexica (Net)	Insensed (Gross)	Paul
E3.500	00	E3,500.00	E0.00	£0.00
nate Invoice				
nca type			Ramed Invento Sala 0	
C. Cargorial			21/10/2022	
Cription				
eprot the				
All Managers				
De Inseise Promi	<ul> <li>A of group per salas (called)</li> </ul>	-1		
	O to at that per sub-a particular	· · · · · · · · · · · · · · · · · · ·		
	C Scher called Physically			
	O hat one (April 1			
physical second	25.00	cluber .		
70	43,000.00			

• Once created your invoice will be shown in Business Pilot:

										Addresses
prictical det		Insured Not		· •	transition for the			é (	dataseting.	
£3,500.00		£875.00	12,625	80	£1,050.00		13.0		£1,050.00	
-	Terr	Base Matter	and Resident	and the second se	8100	-	-	Balance	Bala	
1 T	Depent		100	10711	0.09000	10.00		11,000,00	Rainet	890
				847548	41.00000	41.00		Alaman		



• Now head over to Xero, and the business tab click on invoices:

	Invoices				
	Realizable - New Constitutes - Serie	at Names ( Super)	+ levers Renders CR		
	Al Dattin Analog Approvalue	Availing Promotions   Part   Hope	-		
	2 france many mercural france many			0	
	Enter Number, Reference, Contact or Amount Strands	rene better better	2	*	
				Marth ar Carr	
Anter to serve Antere   Anter	free free Courts. In the second				1104 1105 0 (0) burch
D Barber Bat		10 M	Tate +	the Date	Iter
D 172 EL Deput track	by contrast 1470	Die Daris Magene	37.042522	4 Nov 2022	1,002,00

 As when the invoice was created, we had the Draft Invoices option set as the default we can see that there is now a draft invoice in Xero matching the details we provided above. Clicking into the invoice we can see the elements associated to the invoice:

Date         Date         Date         Date         Invace #         Reference         Branding           Mr Tany Wiggins         x         27 Oct 2822         1 Nov 2022         372         02 Deposit invace for carri         91bindard         •           Account No.VMODIOIO         •         •         372         02 Deposit invace for carri         91bindard         •           Bir British Frund         •         •         •         Amount and 1 as Exclusive         Tas Exclusive           Birm         Deposit Date         •         010         Unit Price         Disc %         Account         Tax Rate III         Region         Amount GBP           Deposit Date         •         1.10         825 d0         20% (NET an income)         825 d0         825 d0		<b>0</b> ×	ero now has a beth	er way to invoice	with auto	saving, a clean layout a	and more		Try	it out now	1
At Tany Wiggins         s         27 Oct 2822         •         1 Nov 2022         •         372         082. Deposit invoice for carri         Standard         •           At many Wiggins         s         200         1 Nov 2022         •         372         082. Deposit invoice for carri         Standard         •           At many Wiggins         s         Image: Standard         •         Image: Standard         •         Image: Standard         •         Image: Standard         Tax Exclusive           Attem to the time of ti	Diatt							O Preview	Emet.	Psint POF	Invoice Options
Annount Mix. VMCGLIGHT         Annount Arm         Tax Example           BBP Detailplion         Opy         Unit. Phics         Clsic. 5s         Account         Tax Example         Annount GEDP           Begoat Due         1.10         B275.00         20% (VAET on Income)         B125.00         B275.00           Add a new Mixe         •          Buitzetal         875.60           Total VAET 20 50%         •         •         50.00         175.60	6		Date	Due Date	300	olce #	Reference	Branding			
Description     One     One     Unit Endocription     Date Endocription     Tax Endocription       Imm     Descriptions     One     Unit Philes     Chr.s fs. Account     Tax Rante III     Ringtion     Annume GBP       Descriptions     1.00     B25.00     20% (VRE on income)     B25.00     B25.00       Add a new line     •     -     -     -     -     -	Mr Tany Wiggins	×	27 Oct 2022	<ul> <li>1 Nov 2022</li> </ul>	* 37	2	02. Deposit invoice for conf	Standard			6
Nem         Description         Obj         Unit Price         Disc %         Account         Tax Rate III         Region         Ansunt GBP           Deposit Due         1.00         8/75.00         20% (VAE on tocome)         8/75.00         8/75.00           Add a new line         •          5/75.00         100         8/75.00         100	Account No.VPCQ16	01									
Deposit Das         1.00         825.00         20% (VAT on income)         875.00           Add a new line         •	DBP British Pound								N	nounte are Tax	Exturne
Add a new liter	Ren .	Descriptio			ON	Unit Price Disc %	Account	Tax Rate III		ingion i	Amount GBP
Tytel VAT 20.00% \$75.0		DepositDu			1.00	875.00		20% (VAT on Income	e		875.00 >
	Add a new line									Dutteral	875.00
TOTAL 1,050.00									THE WA	20.00%	175.00
									то	TAL	1.050.00
											.,
	Seve	-								Appeirer	- Canci
Save + Apprint - Can											
Save - Approve - Can						Saddella da es	and Internal Prove				
Switch to new involving	fory & Notes										



- In this example, we hadn't matched up our nominal codes fully (as per the setup section above), but you see this isn't a problem as the invoice still comes through and can be assigned to the correct account through Xero.
- We see that it's also correctly picked up the VAT rate set in the contract.
- The invoice number is set to match the invoice number generated in BP to keep this consistent.
- If you are happy with this invoice, you can then click on Approve at which point it is posted to the customer account and correct ledgers in Xero.
- Xero also lets you know that for any invoice, where it was created from, and you can see in the notes section above that it was received through the API from Business Pilot.



## **Customer Invoice Payments**

- Once payments received in your bank account are allocated/reconciled to invoices in Xero these payments will then be sent back through the API to Business Pilot which then adds them to the invoices in BP.
- Let's create a manual payment against the above invoice in Xero:

Amount Paid	Date Paid	Paid To	Reference	
1050.00	27 Oct 2022	090 - Business Bank Acct +	1234	Add Payment

 Once we click on Add Payment this will send the message on BP. It can take up to 5 minutes to receive the response and process it, but when it is received, we can now see the following in BP:

CONTACT DetAils	Adouty Documents images	templates Appoints		-urchase orders - Habing							+ Add Invoice
Job	Value Net	Involced Net		To Invoice Net		Invoiced Gross		Paid		Outstanda	ng (
£3,	500.00	£875.00		E2,625.00		£1,050.00		£1,050.00		£0.00	
Line	Туре	Date Raised	Inv Number	Net	Gross	Paid	Date Paid	Balance	Status	Exported	
	02. Deposit		372	£875.00 £875.00	£1.050.00	£1.050.00 £1.050.00	27/10/2022	E0.00		~	808
Do	Busine	ss <b>Pilo</b>	t			Xe	ero Ir	nteg	ratio	on Gu	iide

- We can see that the invoice is now paid and note that it has been marked as exported as its all handled through the API.
- So that we have a single data entry point, we have to disable the ability in Business Pilot to add payments against invoices in Business Pilot.
- This is because payments are received and allocated inside of Xero and thus avoids duplications.
- Note that once an invoice is paid (fully or in part), or has had credits allocated to it, it can no longer be deleted.
- This is one of the rules Xero adheres too and so we have also made this the case in Business Pilot for consistency.



# Supplier Invoices

- Whenever a supplier invoice is recorded, or a job cost added against a contract or for example you assign stock to a job an invoice will be generated inside of Xero. The exception is whenever you mark the cost to not be exported as Business Pilot will not push this through to Xero if you do not wish it to do so for certain costs.
- Lets take our contract where we have added an example invoice and firstly create a purchase order:



• Once added edit the purchase order and add a new invoice:

urchase Order Invoices			
dd New Invoice			
and the		Normal Loss	
25156-2512	G	Colt of Grands Sold	
wate Reference			
SAMP123		#1.000.00	
		with South	
		n	
		141	
		6200.00	1
		6.1 w/m	
		~	
		Dever	
	×	The second se	



• Then click Add Invoice and head over to Xero and look under Business -> Bills to pay:

			Bills				
			Non Bill   w	New Mysel Court Course Set Your would			
			AL Datios Availage	Approval as Assessing Proposed case. Part Terr	pretro		
10	stand for adjustment Augusteen	(Ashrine	(TAN) In Street processo			1.844111208-00.008	Seattle.
D.	And Medical		From	Date +	Oue Date	(hat	
D	349400		Sangle	17 (24 382)	2° 64 782	1,310.00	_

• We can see the cost has come over to Xero. Click into the bill:

aut .								Pe	et PDF	Bill Opti	005-
iom.		Date	Due Date	Reference	C#						Tot
langie		27 Oct 2022	27 Oct 2022	369030		a				1	290.0
covert No.5/WP01	01										
GBP British Pound	٠							Amounts are	Ter Exck	aite	1
them	Desire	tions		- QN	Unit Price	Account	East Mathe 10	Bagion	Area	HE GOP	
	1 a Cese	ment Windows		1.00	1,000.00	310 - Cost of Goods Sold	20% (VRT on Expense)			1,000.00	×
								TOTAL	1	,200.0	0
Save								Approve		Ga	201
								-		-	
tory & Rictor											
and by Bystem Gen selved through the			c.								

• We can see it come in through the API and has correctly assigned the expense to the chosen account in Xero along with the appropriate VAT code whilst also assigning to the appropriate supplier (which was added at the time of creation of the supplier invoice in this instance).



Edit Dill 200020

• So now once a contact is connected to Xero you have this extra field in the contact record:

Key Info	U0 Merge Contact	Address		٠
Contact Type	Lead	Address 1	11 Banks Drive	
Retail/Trade?	Retail	Address 2		
Salutation	Mrs	Address 3		
First Name	Margaret	Town	Sandy	
Last Name	Thatcher	County	Bedfordiðire	•
Company Name		Postcude	5G19 1AE	٩
Main Number	J 01234 269911	Country	- Select -	*
Mobile Number	٦	Accounts Reference	THA10001	
Alt Number	9	Default invoice Due Days		:

• If your system is now connected to Xero and you go to manage contract types you will see the following:

Add C	ontract Type									
	Name	Y Code	T Display code as prefix?	Display code as suffix?	Y Nominal Code	T BG Colour	Text Colour	T Active?	T Connected to Xero	Y Xero Tracking Option
8	01. Retail Windows & Doors	RWD	~	*	4000 - Sales Invoice		•	~		
8	02. Trade Windows	τw	~	*	4000 - Sales Invoice		•	~		
1	03. Retail Conservatory	RC	*	×	4000 - Sales Invoice		•	~	*	
8	04. Trade Conservatory	TC			4000 - Sales Invoice	•	•	*	*	
8	05. Retail Glass Units	RGU	*	*	4000 - Sales Invoice		•	~	*	
8	06. Trade Glass Units	TG		*	5001 - Purchase Involces		•	~	*	
1	Garage Doors	GD	*	*	4000 - Sales involce		•	~	*	
1	Retail Garage Doors	RGD			4000 - Sales invoice		•	~	*	
	Retail Roofline	RR	*	*	4000 - Sales Invoice		•	~		
	Temp	TMP - 101			4000 - Sales Invoice			*		



• To connect a contract type to a tracking category option, click edit on the contract type to see:

Edit Contract Type	×
	^
BG Color	
Text Color	
Active?	÷
Yes	
Xero Tracking Option?	
Contract Type - Retail Windows & Doors	
Save	

 The Xero Tracking Option field shows a dropdown listing all Active options for all Xero categories. For example, we created a Contract Type Tracking Category in Xero and then under that a Retail Windows & Doors options. If we select this and save it the list of contract types refreshes and we can now see it is connected:

Mana	ige Contract Ty	pes	5															
+ Add C	ontract Type																	
20	Name 01. Retail Windows & Doors	T	Code	Display code as prefix?	Display code as suffix?     X	T	Nominal Code 4000 - Sales Involce	T	BG Colour	Ŧ	Text Colour	Ŧ	Active?	T Conne	cted to Xero	T	Xero Tracking Option Contract Type - Retail Windows & Do	T
þ	Busir	n	es	s <b>Pilot</b>						Х	er	0	In	te	gra	ti	on Guid	de

- From now on any line on an invoice that is created from a contract type which is now linked to a tracking category option will have that tracking category option assigned to the invoice line in Xero.
- We have also modified the customer invoice reference field that is passed to Xero. Previously this contained the invoice description and contract number. We have modified this to just contain the contract number.
- For the invoice reference for supplier invoices this previously contained the Job Cost Id from BP. This will now display the following: Contract Number / PO Number (if from a PO) / Supplier Invoice Reference.

