



Xero & Promo Office Manual



Note: Xero & Promotional office are not directly linked, this means the user has to do more than they would with Sage or Twinfield. For imports to work a member of the Promotional Office support team needs to be able to remote access your machine and change some functions on Promotional Office and Xero

1. Find the invoice you would like to import into Xero.(You can export multiple)
2. Select the **Invoice** and select **Export to Accounts**

Invoice ...	Compan...	Custom...	Gross A...	Outstan...	Input...	Total Se...	Cost Price	Mark Up	Invoice ...	Telephone	Invoice ...
624	Jenny F...	29082001	£ 411.00	£ 411.00	07/08/2...	£ 342.50	£ 130.00	2.63	Invoice		Training 1
623	Blueprin...	2202	£ 15,07...	£ 15,07...	07/08/2...	£ 12,56...	£ 1,345...	9.34	Invoice	+44-11...	Training 3
622	Apex Pr...	7193	£ 249.60	£ 249.60	07/08/2...	£ 208.00	£ 130.00	1.6	Invoice	1603 41...	Training 5
621	Barday...	2	£ 630.00	£ 630.00	04/08/2...	£ 525.00	£ 120.00	4.38	Invoice	+44-12...	Traning 14
620	Airdata	14	£ 630.00	£ 630.00	26/07/2...	£ 525.00	£ 220.00	2.39	Invoice	+256-1...	Support...
619	ABC Ltd	567	£ 60.00	£ 60.00	21/07/2...	£ 50.00	£ 0.00		Invoice	+44-17...	Training...
618	Abbey ...	29082000	£ 67.20	£ 67.20	20/07/2...	£ 56.00	£ 35.00	1.6	Invoice		Training...
617	Anton ...	11031	£ 1,160...	£ 1,160...	20/07/2...	£ 1,160...	£ 745.00	1.56	Invoice	01264 3...	Training...
5239	Airdata	14	£ -12.00	£ -12.00	19/07/2...	£ -10.00			Credit N...	+256-1...	Training...
5238	Adline P...	471	£ -48.00	£ -48.00	19/07/2...	£ -40.00			Credit N...	+44-77...	Training...
614	Khalsa ...	14955	£ 570.00	£ 570.00	19/07/2...	£ 475.00	£ 305.00	1.56	Invoice	0777 34...	Training...
			Σ= £ ...	Σ= £ ...							

3. Assign it a clear and easy to find name and store it
4. Open Xero & Log in
5. In the **Accounts menu**, select **Sales**.
6. Click **Import** and **Browse** to your saved Invoice

Choose whether the prices in UnitAmount column are tax exclusive or tax inclusive.

Step 3. Import the updated template file

Select the file to import

No file selected

The file you import must be a CSV (Comma Separated Values) file. The name of your file should end with either `.csv` or `.txt`.

Would you like to update contact address details?

No, ignore all address details

Yes, update contacts with imported address details

Is the UnitAmount field tax inclusive or exclusive?

Tax Exclusive

Tax Inclusive

Review the import message in Xero. if there are errors in the file, you can go back to the file and fix them, then import the file again. Otherwise, click **Complete Import**. You can always enter individual invoices or credit notes, which aren't successfully imported, afterwards

If you have any questions, would like to set up another user or you're experiencing an error please do not hesitate to contact the Promotional Office support team at Support@promotionaloffice.co.uk or call 01252 701092.