

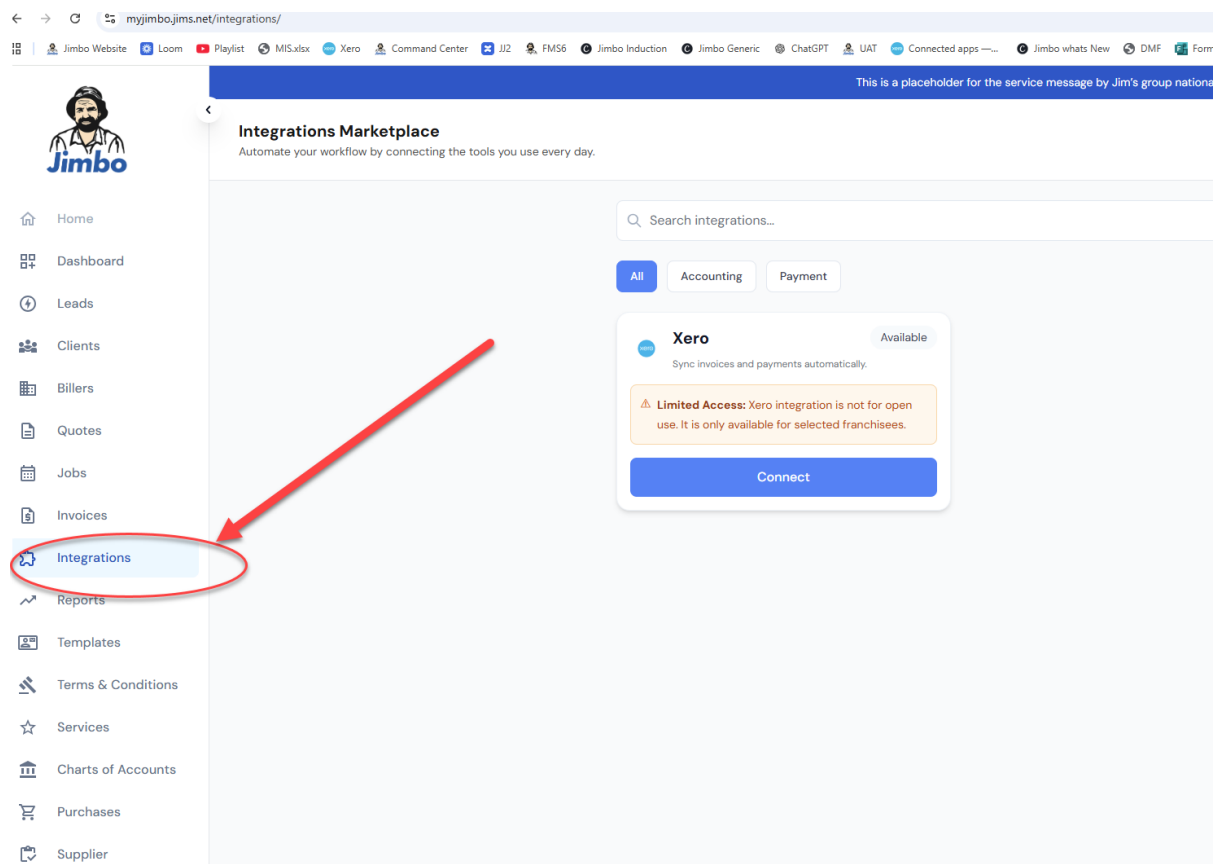
Q: How do I connect to Xero?

Follow these steps to connect your account to Xero:

1. Open the app and navigate to **Home → Integrations**
2. Click **Connect to Xero**
3. You will be redirected to the Xero login page
4. Enter your Xero credentials and click **Allow access**
5. Select the organisation you want to connect

Once connected, you will be redirected back to the app and the integration will be active.

Important: After connecting, you must map your **Revenue Chart of Accounts**. Without this step, invoices will not sync to Xero.



The screenshot displays the Jimbo Integrations Marketplace interface. The left sidebar contains a navigation menu with the following items: Home, Dashboard, Leads, Clients, Billers, Quotes, Jobs, Invoices, **Integrations** (highlighted with a red circle and a red arrow pointing to it), Reports, Templates, Terms & Conditions, Services, Charts of Accounts, Purchases, and Supplier. The main content area is titled "Integrations Marketplace" and includes a search bar, filter buttons for "All", "Accounting", and "Payment", and a card for the Xero integration. The Xero card shows the status "Available" and a "Connect" button. A warning message below the card states: "Limited Access: Xero integration is not for open use. It is only available for selected franchisees."

This is a placeholder for the service message by Jim's group national office. This message

Integrations Marketplace
Automate your workflow by connecting the tools you use every day.

Search integrations...

All Accounting Payment

Xero Available
Sync invoices and payments automatically.

Limited Access: Xero integration is not for open use. It is only available for selected franchisees.

Connect

Connect Your Xero Account

Automate your accounting by syncing invoices and contacts directly to Xero.

[VIEW LOGS](#)

Limited Access

Xero integration is not for open use. It is only available for selected franchisees.

Step 1: Authorization

Connect your account to securely transfer data. We use a secure OAuth process to ensure your information is protected.

● Not Connected

[CONNECT TO XERO](#)



Log in to Xero

to continue to Jimbo 4 FSE Connection Bridge

Email address
Password

[Log in](#)

[Forgot password?](#) [Can't log in?](#)



Jimbo 4 FSE Connection Bridge
wants access to:

Organisation data



Jim's Group
View and manage your business transactions, contacts, and organisation settings

User account information



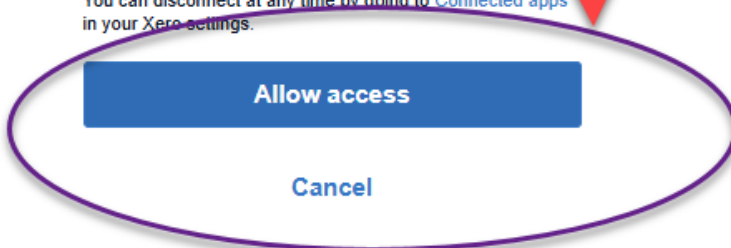
Sarfraz Soudagar
View your name, email, and user profile.

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



Connect Your Xero Account

[VIEW LOGS](#)

Automate your accounting by syncing invoices and contacts directly to Xero.

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Xero integration is not for open use. It is only available for selected franchisees.

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Connect your account to securely transfer data. We use a secure OAuth process to ensure your information is protected.

● Connected to Jim's Group [DISCONNECT](#)

Step 2: Revenue Chart of Accounts Mapping ✓ COMPLETED

✓ All accounts are mapped. Your Chart of Accounts mapping is complete and ready for syncing.

Select Xero account(s) to map

Jimbo Code	Jimbo Name	Xero Account	Status
200	Default (Revenue)	200 - Sales	✓ Synced ⚠ Name differs
260	Other Revenue	260 - Other Rev...	✓ Synced
270	Interest Income	270 - Interest In...	✓ Synced
M1	Mowing	CZ1 - Gradenin...	✓ Synced ⚠ Code differs ⚠ Name differs
NDIS	NDIS	260 - Other Rev...	✓ Synced ⚠ Code differs ⚠ Name differs

Connect Your Xero Account

[VIEW LOGS](#)

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[IMPORT
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[SAVE MAPPING](#)

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Q: What happens if account mapping is not completed?

Invoices will not sync to Xero until account mapping is completed.

Q: Can multiple Xero organisations be connected?

No. Only one Xero organisation can be connected per account at a time.

Q: Is Chart of Accounts mapping required after connecting?



Yes. The Chart of Accounts must be mapped after connecting to Xero. Without this step, invoices will not sync.

Q: How do terms differ between Jimbo and Xero?

- Jimbo Clients → Xero Contacts
- Jimbo Invoices → Xero Invoices
- Jimbo Services → Xero Items

Q: What data is synced back from Xero?

Type	Category	Action in Source System	Result in Target System	Notes	Workaround
✓ Sync	Invoice	Create invoice in Jimbo	Invoice created in Xero	—	—
✓ Sync	Invoice	Create draft invoice in Jimbo	Draft invoice created in Xero	—	—
✓ Sync	Invoice Payment	Mark invoice as paid in Jimbo	Invoice marked as paid in Xero	—	—
✓ Sync	Invoice Payment	Mark invoice as paid in Xero	Invoice marked as paid in Jimbo	Two-way sync	—
✓ Sync	Service / Item	Create new Service in Jimbo	Item created in Xero	Requires "Sync to Xero" ticked	Ensure checkbox is part of process/training
✓ Sync	Client	Create new Client in Jimbo	Client created in Xero	Requires "Sync to Xero" ticked	Ensure checkbox is part of process/training
⚠ Limitation	Invoice	Create invoice in Xero	No invoice created in Jimbo	One-way limitation	Use Jimbo as the source of truth. Create invoices in Jimbo and sync to Xero

Type	Category	Action in Source System	Result in Target System	Notes	Workaround
 Limitation	Service / Item	Create new Item in Xero	No Service created in Jimbo	One-way limitation	Use Jimbo as the source of truth. Create Services in Jimbo and Sync to Xero
 Limitation	Chart of Accounts - Revenue	Create new Chart of Account in Jimbo	Must be manually created in Xero	No automatic sync	Must be created in both systems and remapped as required once new accounts are created Video guide: Link

Q: How does the integration work?

- Creating an invoice in Jimbo will automatically create a corresponding invoice in Xero
- Creating a draft invoice in Jimbo will create a draft invoice in Xero
- Marking an invoice as paid in Jimbo will update the invoice as paid in Xero
- Marking an invoice as paid in Xero will update the invoice as paid in Jimbo
- Creating a new Service in Jimbo will create a new Item in Xero (*when "Sync to Xero" is enabled*)
- Creating a new Client in Jimbo will create a Contact in Xero (*when "Sync to Xero" is enabled*)

Considerations

- Creating an invoice in Xero will **not** create an invoice in Jimbo. Use Jimbo as source of truth, rather than this creates an invoice in Jimbo and Sync to Xero
- Creating a new Item in Xero will **not** create a Service in Jimbo. Use Jimbo as source of truth, rather than this creates an Service in Jimbo and Sync to Xero
- Chart of Accounts are not synced automatically, any new account created in Jimbo must also be created manually in Xero

Q: What should I do if I need help with Xero?

Our technical support is limited to Jimbo only. As Xero contains sensitive financial information, we're unable to assist with Xero-specific technical queries.

For help with Xero, please use the resources below:

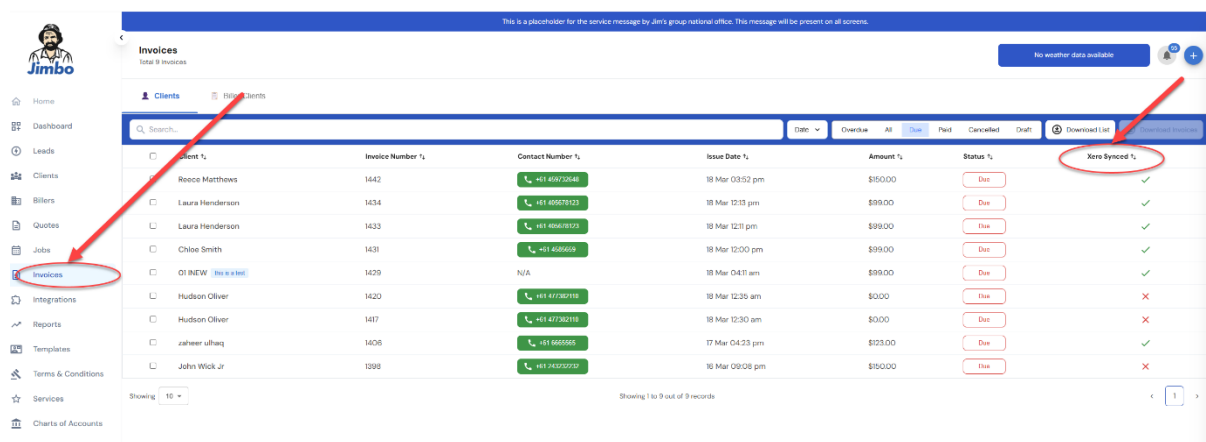
- Xero Help Centre: <https://central.xero.com/>
- Contact Xero Support: <https://central.xero.com/s/contact-support>

Q: How often does the sync happen?

Sync occurs automatically whenever invoices or data are created or updated. It can also be triggered manually if required.

Q: Are invoices synced automatically?

Yes. All invoices are synced to Xero automatically, including draft invoices.



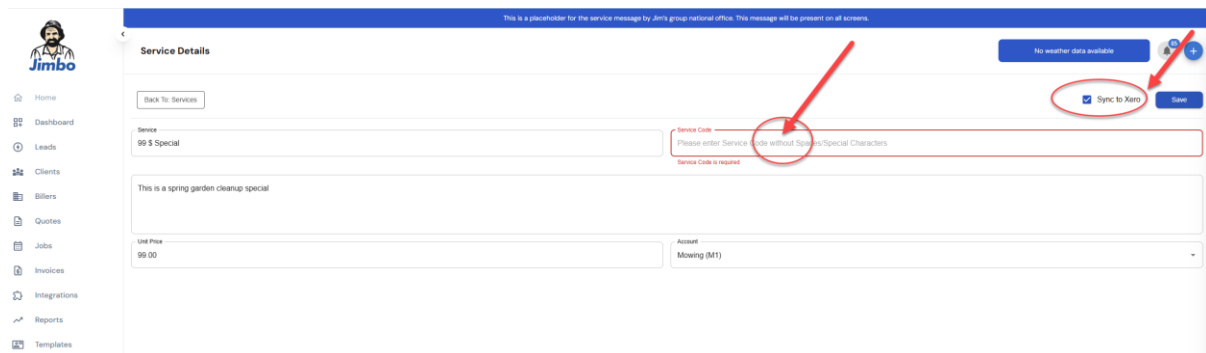
This is a screenshot of the Jimbo Invoices interface. The interface shows a list of invoices with columns for Client, Invoice Number, Contact Number, Issue Date, Amount, Status, and Xero Synced. Red arrows point to the 'Invoices' menu item on the left and the 'Xero Synced' column header. The 'Xero Synced' column contains checkmarks for most invoices and red 'X' marks for others.

Client	Invoice Number	Contact Number	Issue Date	Amount	Status	Xero Synced
Reece Matthews	1442	+61 819 72044	18 Mar 03:52 pm	\$150.00	Due	✓
Laura Henderson	1434	+61 805291323	18 Mar 12:13 pm	\$99.00	Due	✓
Laura Henderson	1433	+61 805639372	18 Mar 12:11 pm	\$99.00	Due	✓
Chloe Smith	1431	+61 4066669	18 Mar 12:00 pm	\$99.00	Due	✓
QI INEW (In a file)	1429	N/A	18 Mar 04:11 am	\$99.00	Due	✓
Hudson Oliver	1420	+61 817 827316	18 Mar 12:36 am	\$0.00	Due	✗
Hudson Oliver	1417	+61 477362116	18 Mar 12:30 am	\$0.00	Due	✗
zahwee ulhaq	1406	+61 6665555	17 Mar 04:23 pm	\$123.00	Due	✓
John Wick Jr	1398	+61 743222222	16 Mar 09:08 pm	\$100.00	Due	✗

Q: Why are some invoices not syncing to Xero?

Invoices may fail to sync to Xero for the following common reasons:

- The invoice total is \$0
- The client has not been synced (e.g. missing required details such as an email address)
- The Chart of Accounts has not been mapped
- Jimbo Services contain empty or invalid values (e.g. blank service fields)



Q: Are zero-value invoices synced?

No. Invoices with a total value of \$0 are not synced to Xero.

Client	Invoice Number	Contact Number	Issue Date	Amount	Status	Xero Synced
O1 INEW	1430	N/A	18 Mar 09:39 pm	\$3,000.00	Paid	✓
O1 INEW	1429	N/A	18 Mar 04:11 am	\$99.00	Overdue	✓
John Wick Jr	1422	+61 24322292	18 Mar 01:15 am	\$0.00	Paid	✗
Hudson Oliver	1420	+61 477382110	18 Mar 12:35 am	\$0.00	Overdue	✗
Hudson Oliver	1417	+61 477382110	18 Mar 12:30 am	\$0.00	Overdue	✗
O1 INEW	1415	N/A	17 Mar 11:34 pm	\$145.00	Paid	✓
Daniel Thompson	1414	+61 291224567	17 Mar 11:32 pm	\$120.00	Paid	✓
Test CH3	1413	+61 0787479475	17 Mar 10:56 pm	\$100.00	Paid	✓
zaheer ulhaq	1406	+61 9965565	17 Mar 04:23 pm	\$123.00	Overdue	✓
zaheer ulhaq	1405	+61 9965565	17 Mar 04:21 pm	\$120.00	Paid	✓

Q: What happens when an invoice is marked as paid in Xero?

The payment status is automatically updated in Jimbo.

Q: Where can I find the Jimbo invoice number in Xero?

The Jimbo invoice number can be found in the **Reference** field of the invoice in Xero.

Set up invoice template

Sent

Contact	Issue date	Due date	Invoice number	Reference	Online payments	Branding theme	Invoice reminders
Test Prop No address	15 Apr 2026	22 Apr 2026	INV-0632	Jimbo Invoice Number: 1482	None	Standard	On

Item	Description	Qty.	Price	Disc.	Account	Tax rate
<input type="text" value="DAI001"/> Digital Antenna Installation	REQUEST FOR DIGITAL ANTENNA INSTALLATION	1	100.00		200 - Sales	GST on Income
<input type="text" value="AAA002"/> AAA	This is a tst	1	100.00		200 - Sales	GST on Income
<input type="text" value="EOLC003"/> End of Lease Cleaning	END OF LEASE CLEANING REQUEST	1	10.00		200 - Sales	GST on Income
<input type="text" value="AIRBNB-TURNOVER"/> Airbnb Turnover Cleaning	AIRBNB REGULAR TURNOVER CLEANING REQUEST	3	115.00		200 - Sales	GST on Income

Columns (0 hidden) Subtotal

Q: If I edit an invoice in Xero, will it update in Jimbo?

No. Changes made in Xero do not sync back to Jimbo.

Recommended workflow:

Always make edits in Jimbo first, then allow the changes to sync to Xero.

Q: Can I delete or void invoices in Xero?

Yes. However, deletions or voided invoices in Xero may not be reflected back in Jimbo. Please cancel the invoice in Jimbo also.

Q: Why is my invoice amount different in Xero?

This may occur due to:

- Tax or rounding differences between systems
- Manual edits made directly in Xero

Q: How do I sync existing clients to Xero?

Clients are automatically synced to Xero when they are used in an invoice or updated after the Xero connection is established.

You can confirm this using the **“Sync to Xero”** checkbox. If it is not already enabled, ensure you tick this option to allow the client to sync.

The screenshot shows the 'New Client' form in the Jimbo system. The form includes the following fields and options:

- Back To: Clients** (with a checkbox for **Billor Client**)
- First Name** and **Last Name** text input fields
- Company Name (Optional)** text input field
- Contact Number** (+61) and **Work Number** text input fields
- Home Number** and **Fax Number** text input fields
- Email** text input field
- Client Notes (Optional)** text area
- Property** section with a dropdown for **Type** (Residential) and an **Address** text input field
- + Add Property** button
- ★ Default** indicator
- Sync to Xero** checkbox (checked) and **Save** button

The sidebar on the left contains navigation options: Home, Dashboard, Leads, Clients, Billers, Quotes, Jobs, Invoices, Integrations, Reports, Templates, Terms & Conditions, Services, and Charts of Accounts. The top right shows a weather widget and user profile.

Clients

Q: Why is email required for client sync?

Email is used as the unique identifier to match clients between Jimbo and Xero.

Q: Will clients without an email be synced?

No. Clients without an email address will not be synced.

Q: What happens if multiple clients have the same email address?

They will be mapped to a single contact in Xero.

Q: Can duplicate contacts be created in Xero?

Yes. If matching fails (e.g. different email or naming inconsistencies), duplicate contacts may be created in Xero.

 Services / Items**Q: How are Services synced to Xero?**

Services in Jimbo are synced to Xero as Items.

- If an item already exists in Xero, it will be reused
 - If it does not exist, a new item will be created
 - This is a one-way sync from Jimbo to Xero
-

Q: When are services synced to Xero?

Services are synced when they are used in an invoice.

Q: Can I edit items in Xero and sync changes back?

No. Changes made to items in Xero do not sync back to Jimbo.

 Errors & Troubleshooting**Q: Why is my sync failing?**

Common reasons include:

- Expired Xero connection
 - Missing account mapping
 - Invalid tax configuration
-

Q: What happens if my Xero connection expires?

You will need to reconnect Xero to resume syncing.

Disconnect & Reconnect

Q: What happens when I disconnect Xero?

- Sync stops immediately
 - No new data will be sent or received
-

Q: Will my data be deleted if I disconnect Xero?

No. All data remains in both Jimbo and Xero.

Q: Can I reconnect Xero later?

Yes. However, you may need to reconfigure mappings after reconnecting.

Q: Will data sync automatically after reconnecting?

Only new or updated data will sync unless a manual sync is triggered.

Security & Access

Q: Is my data secure?

Yes. The integration uses secure OAuth-based authentication.

Q: How do I disconnect Xero?

To disconnect Xero:

1. Open the app and go to **Home → Integrations**
2. Under Xero, click **Manage**
3. Click **Disconnect**