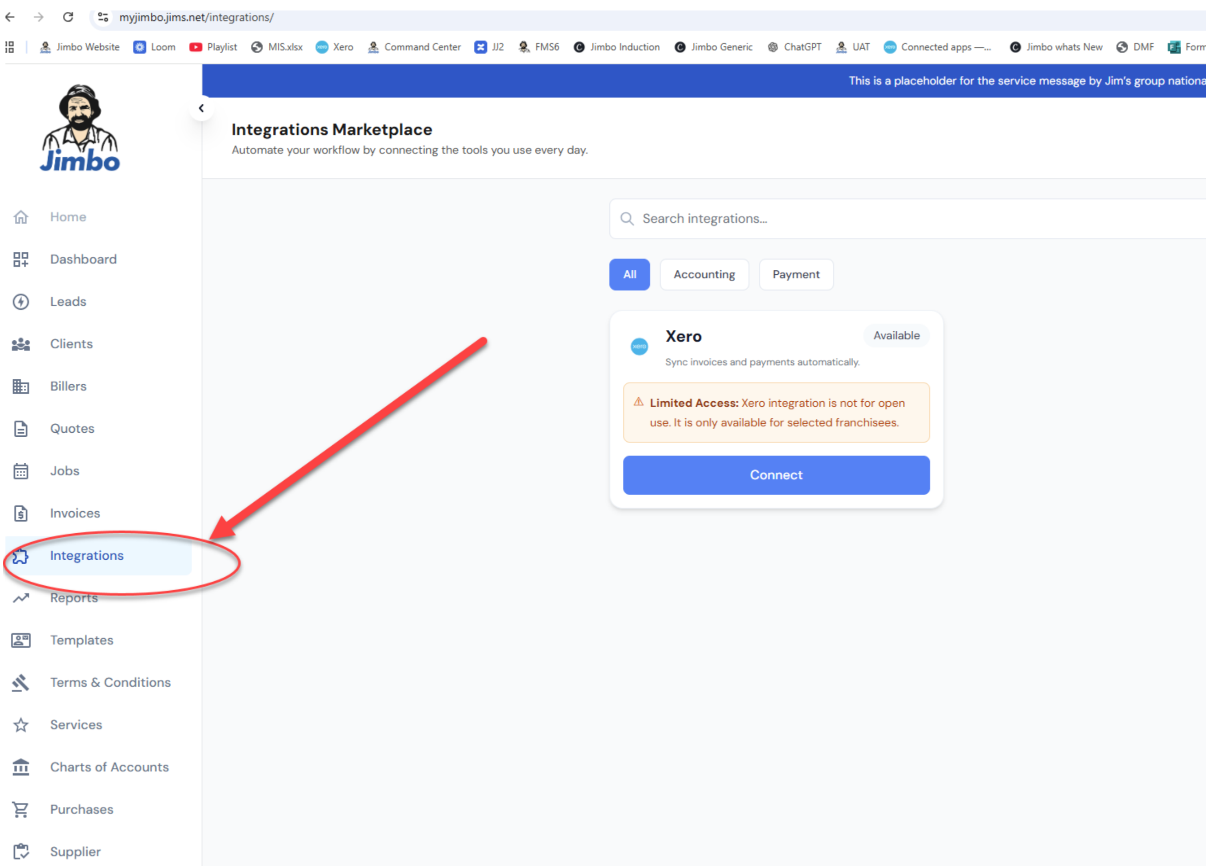
Q: How do I connect to Xero?

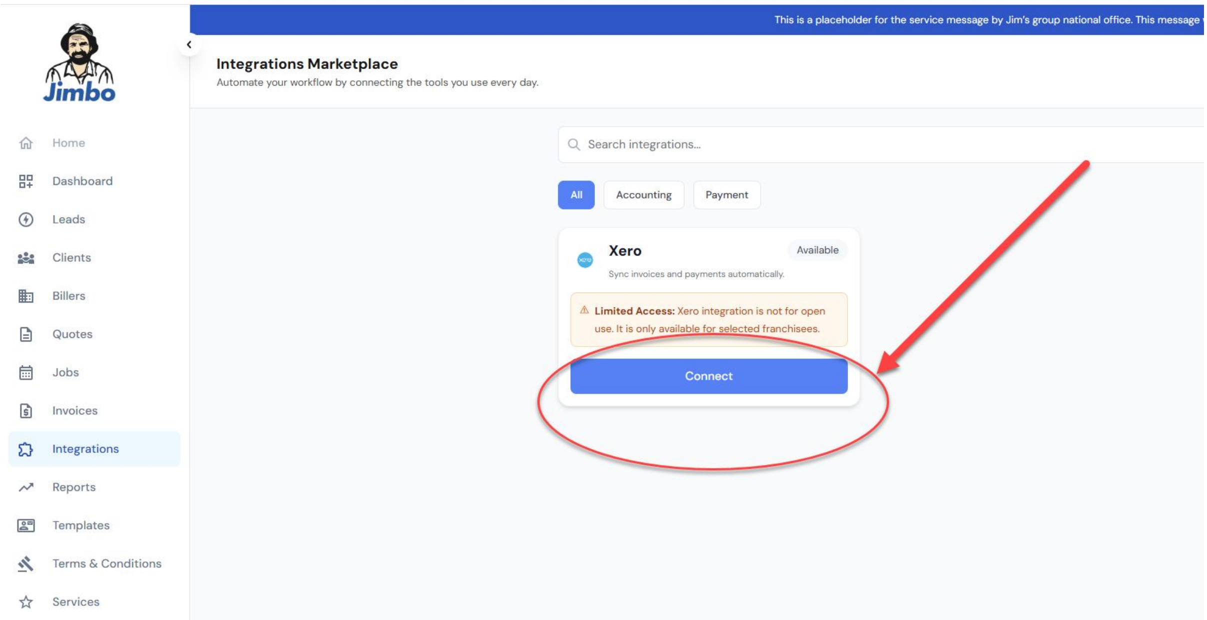
Follow these steps to connect your account to Xero:

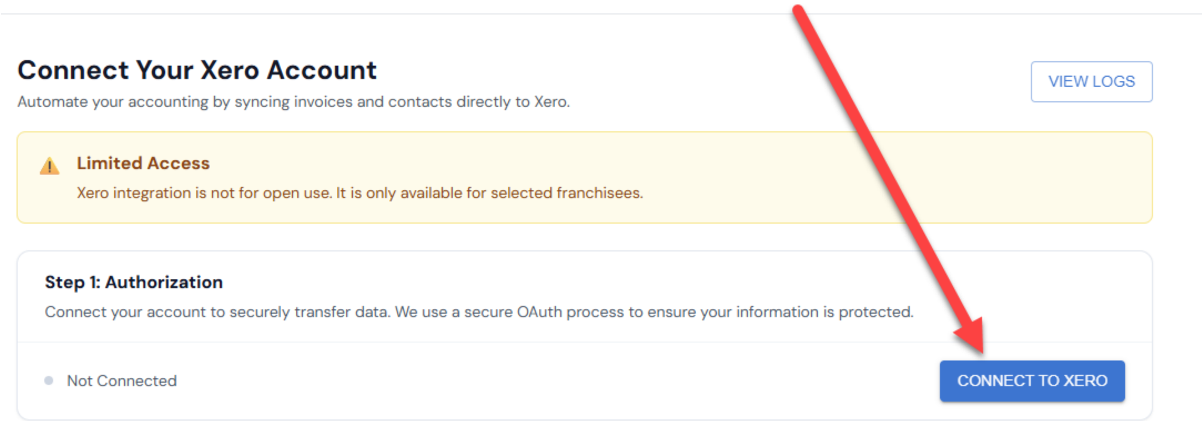
1. Open the app and navigate to **Home → Integrations**
2. Click **Connect to Xero**
3. You will be redirected to the Xero login page
4. Enter your Xero credentials and click **Allow access**
5. Select the organisation you want to connect

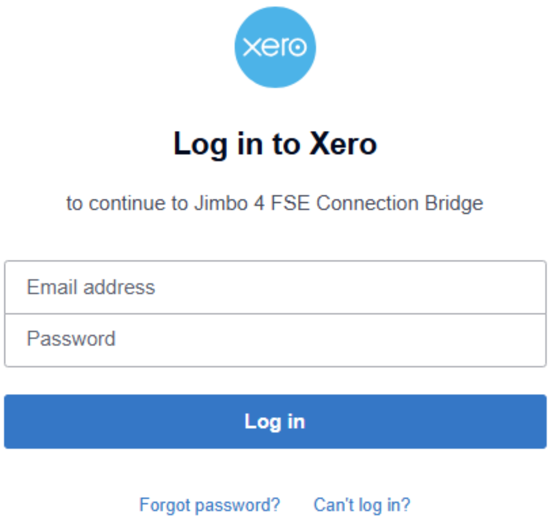
Once connected, you will be redirected back to the app and the integration will be active.

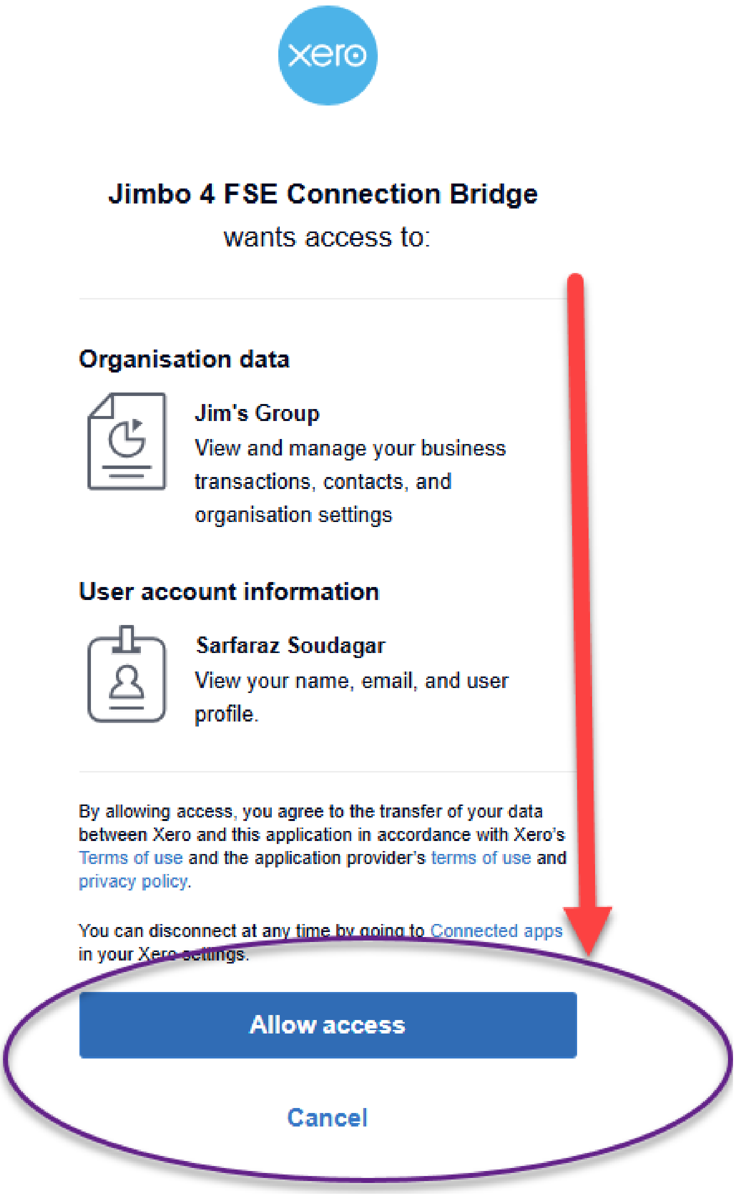
Important: After connecting, you must map your **Revenue Chart of Accounts**. Without this step, invoices will not sync to Xero.

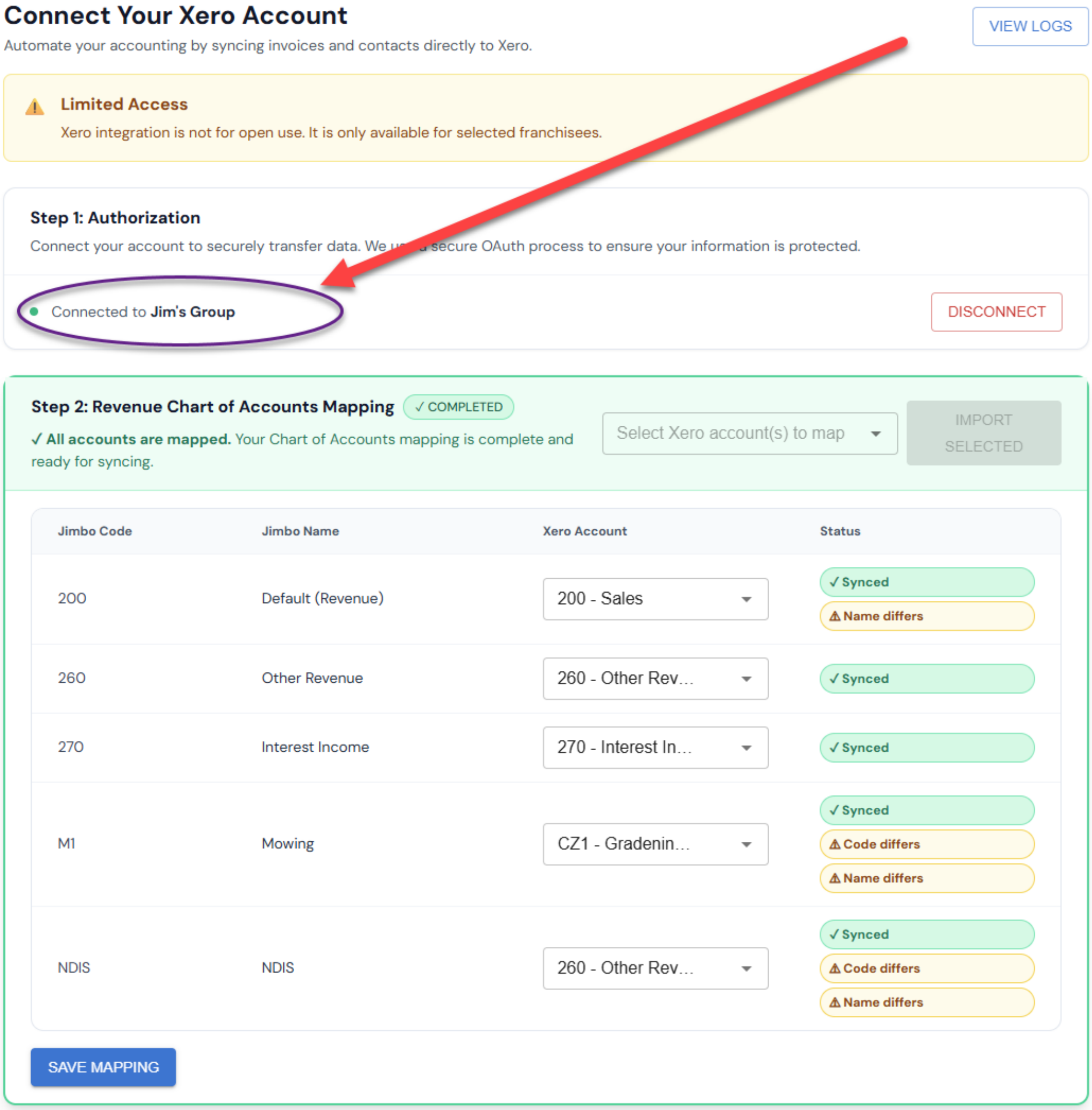



This is a placeholder for the service message by Jim's group national office. This message
Jimbo
Home
Dashboard
Leads
Clients
Billers
Quotes
Jobs
Invoices
Integrations
Reports
Templates
Terms & Conditions
Services
Integrations Marketplace
Automate your workflow by connecting the tools you use every day.
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


xero
Log in to Xero
to continue to Jimbo 4 FSE Connection Bridge
Email address
Password
Log in
Forgot password?
Can't log in?


xero
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
Sarfaraz 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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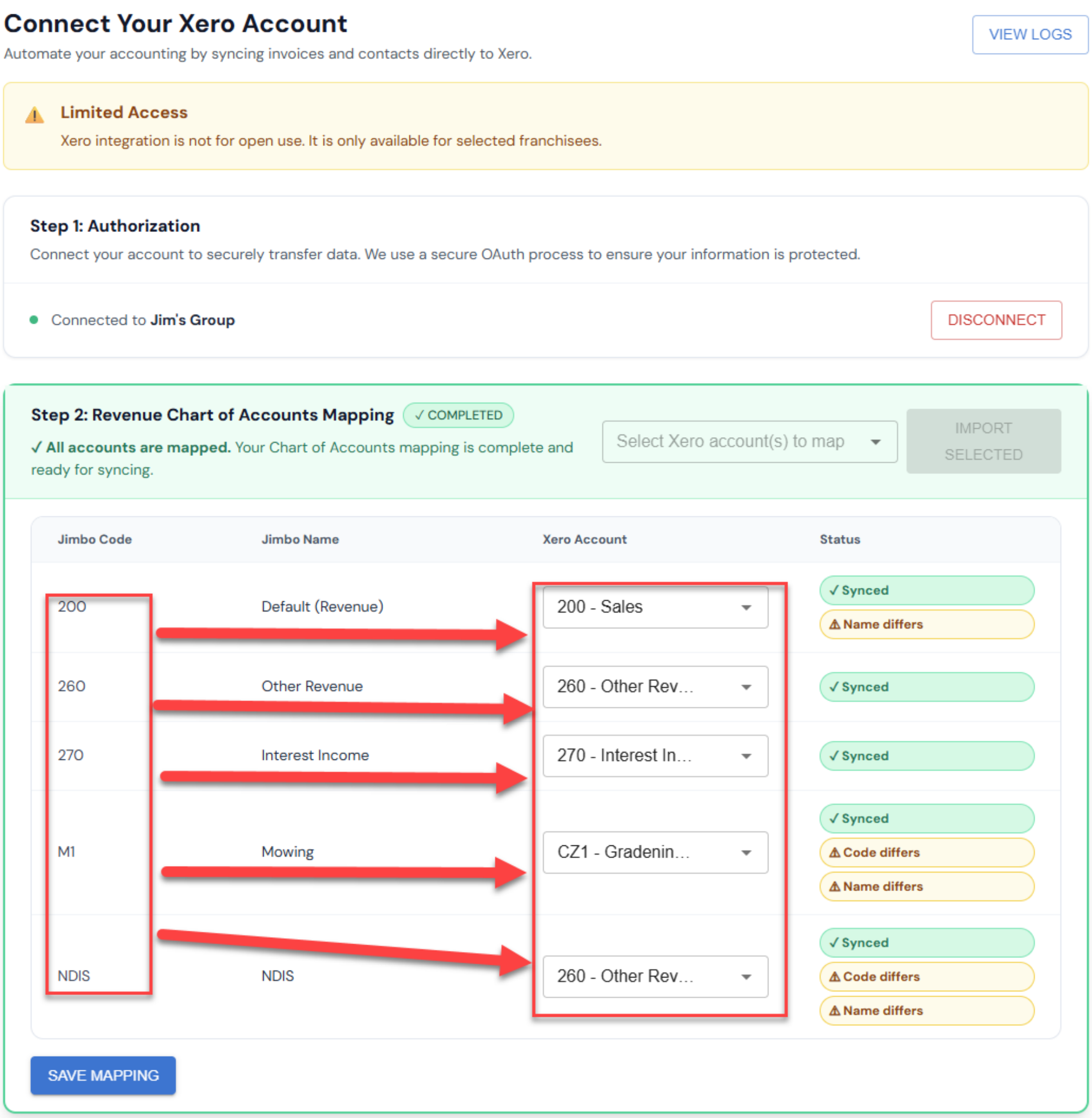
Connected to Jim's Group
DISCONNECT
Step 2: Revenue Chart of Accounts Mapping
✓ COMPLETED
✓ All accounts are mapped. Your Chart of Accounts mapping is complete and ready for syncing.
Select Xero account(s) to map
IMPORT SELECTED
Jimbo Code
Jimbo Name
Xero Account
Status
200
Default (Revenue)
200 - Sales
✓ 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
SAVE MAPPING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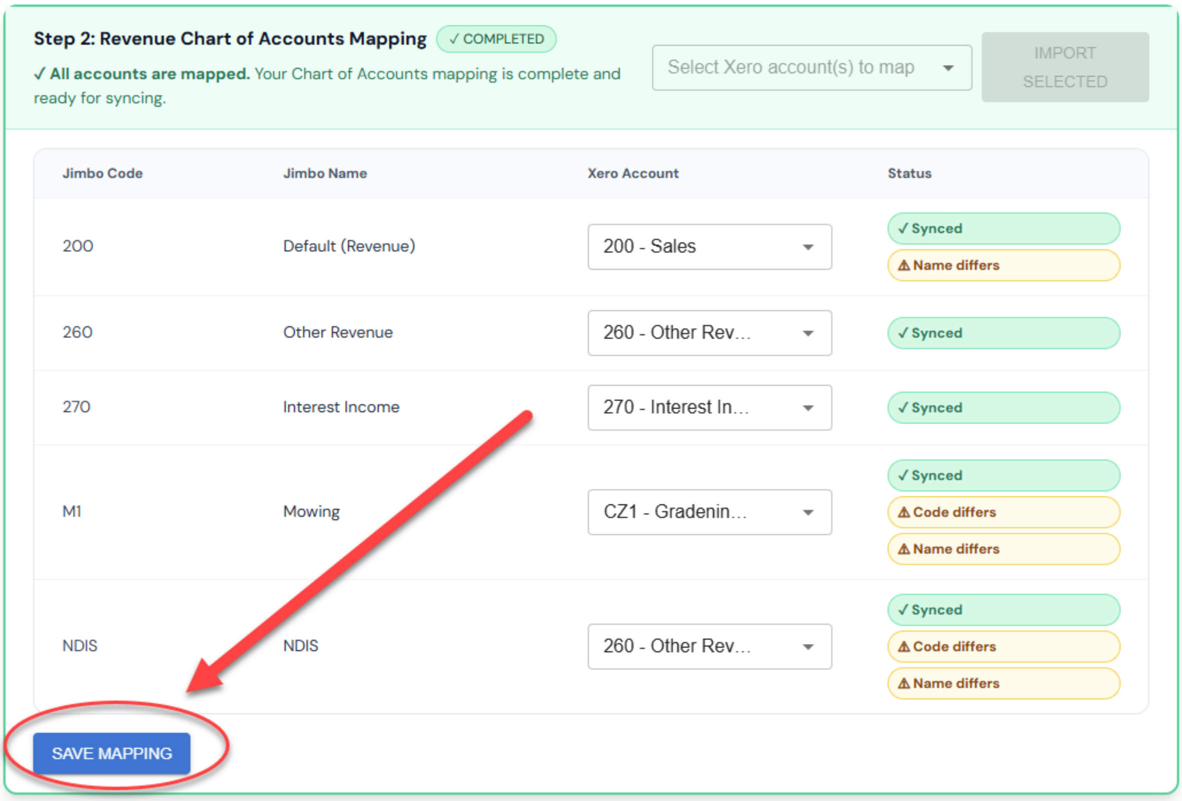


Q: What happens if account mapping is not completed?

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:

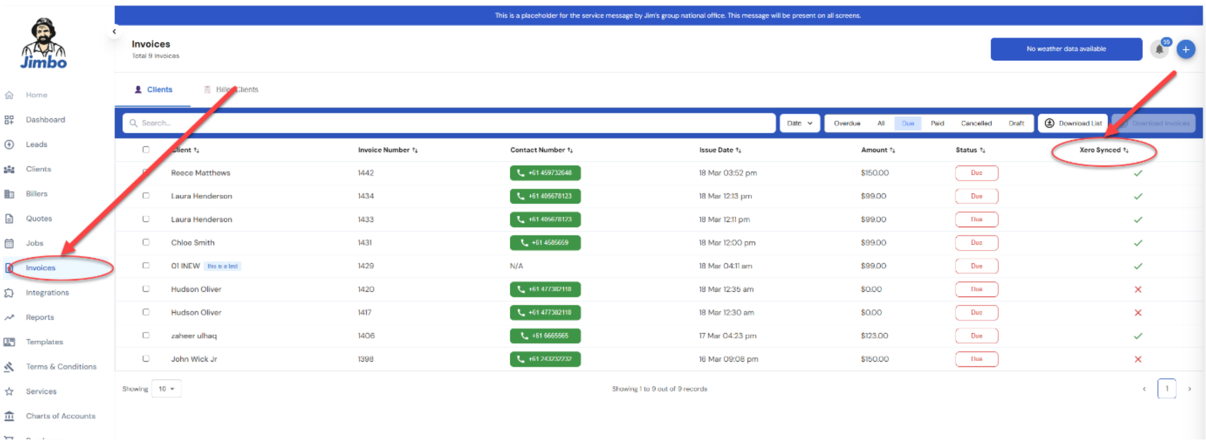
- Xero Help Centre: https://central.xero.com/
- Contact Xero Support: https://central.xero.com/s/contact-support

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?

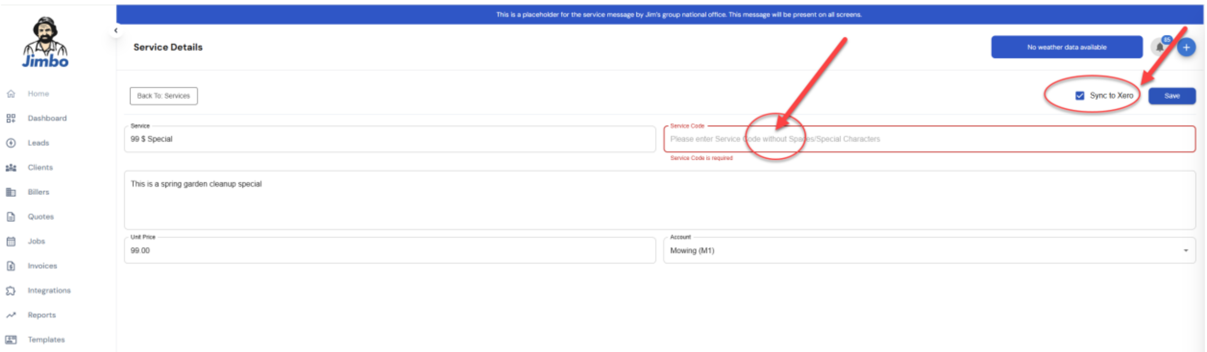
Yes. All invoices are synced to Xero automatically, including draft invoices.



Q: Why are some invoices not syncing to Xero?

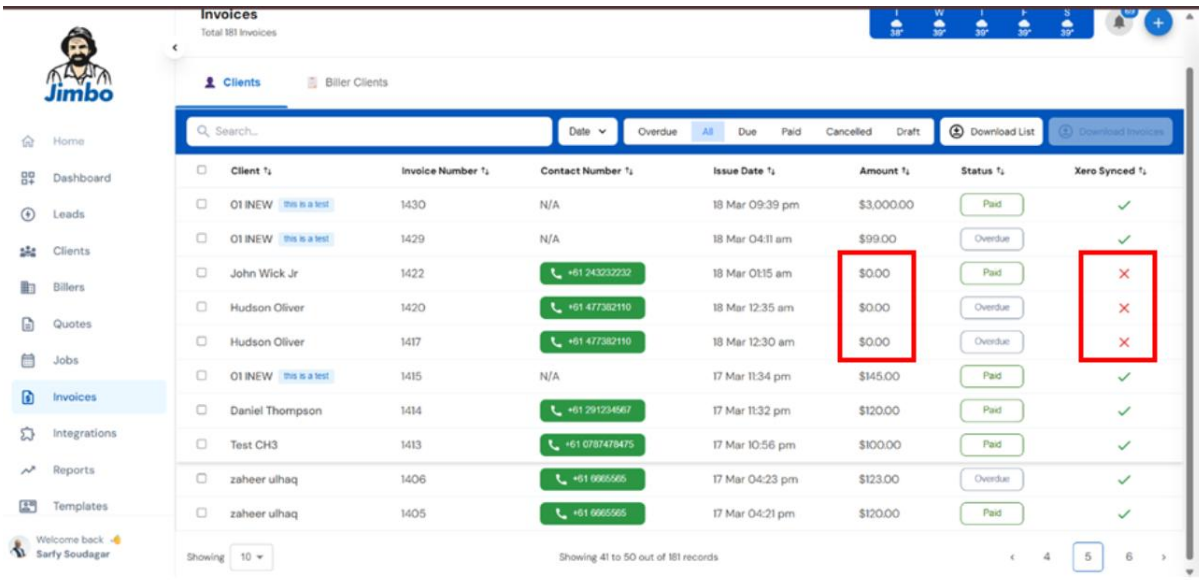
Invoices may fail to sync to Xero for the following common reasons:

- 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.

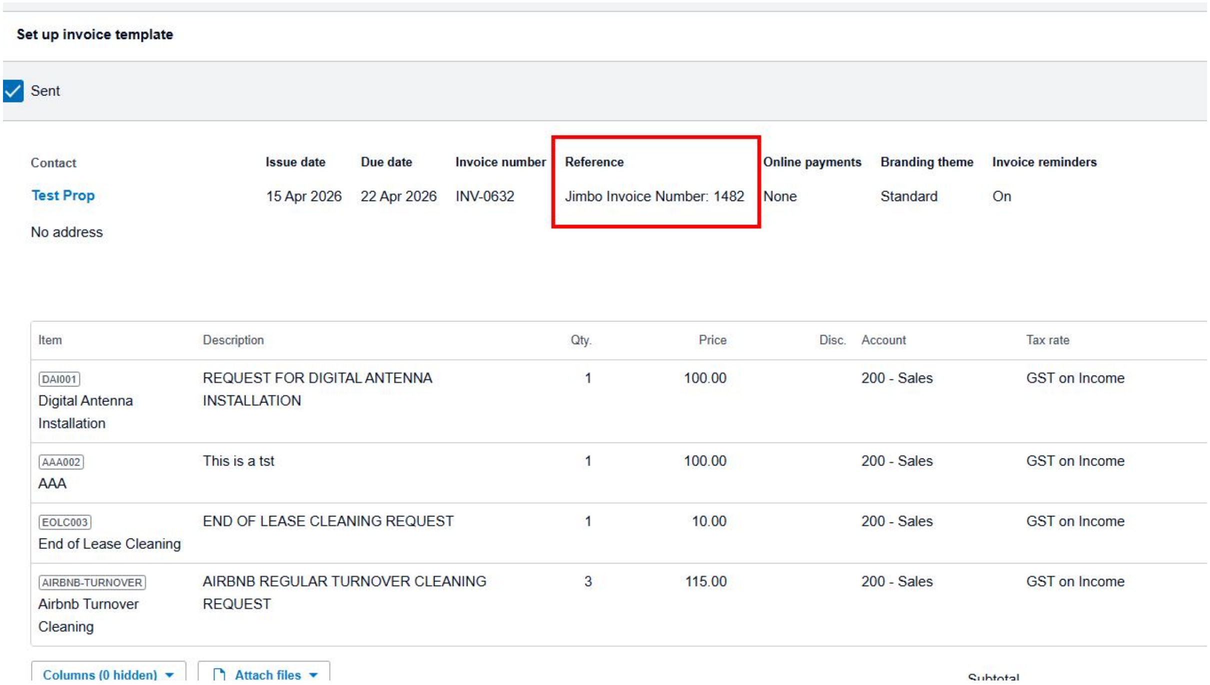


Q: What happens when an invoice is marked as paid in Xero?

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.



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?

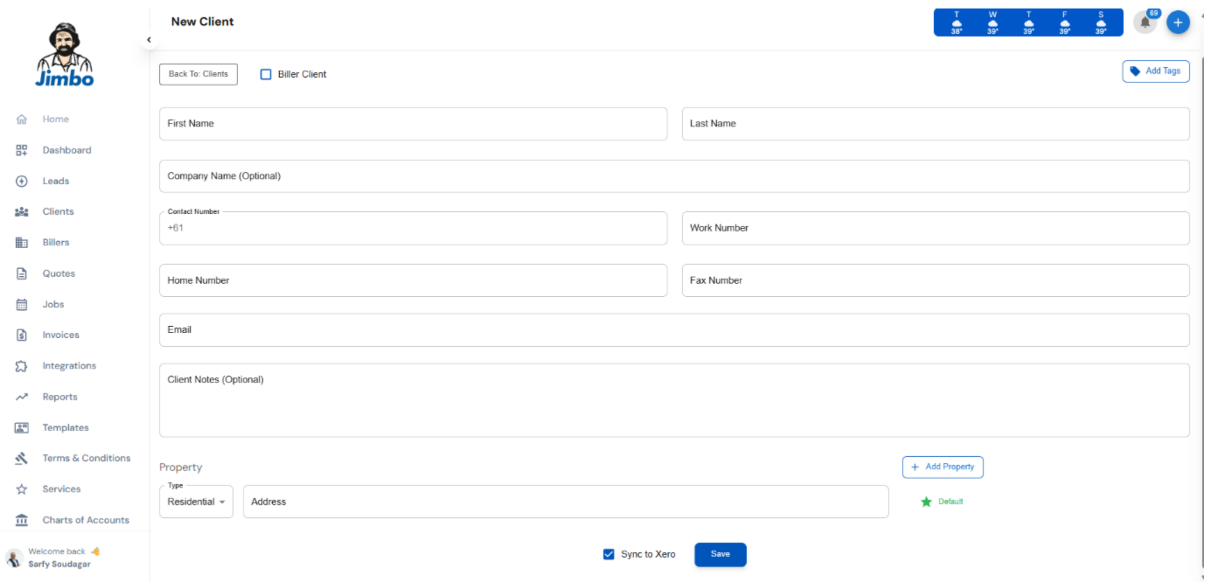
Yes. However, deletions or voided invoices in Xero may not be reflected back in Jimbo. Please cancel the invoice in Jimbo also.

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.



👤 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**