XERO INTEGRATION GUIDE

A step-by-step guide to completing Xero integration via the ePOS Hybrid Admin Panel

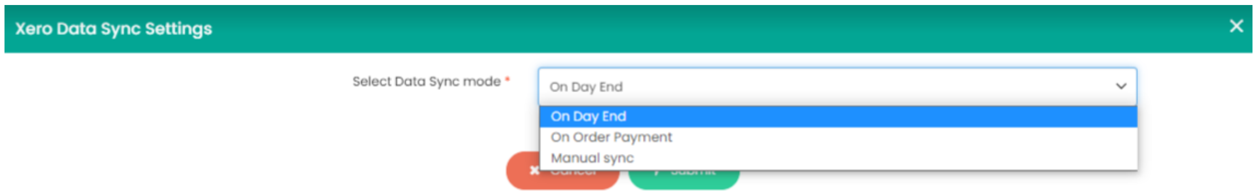
Xero Integration Guide

In this guide, we will display the steps to complete integration with **Xero** via the **ePOS Hybrid Admin Panel**.

Firstly, visit https://eposhybrid.uk and log into the **Admin Panel**. Once logged in, select **Third Party**, followed by **Xero Account**.

The **Xero** screen will appear, allowing you to complete your **Xero Integration**.

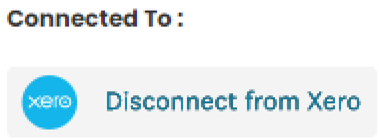
Select the **Status** option to **On**, then select the **Sync** button next to **Data Sync Setting** to open the **Xero Data Sync Settings** pop-up box.



On the **Select Data Sync Mode** dropdown box, **On Day End** is the recommended option. With **On Day End** as the Data Sync mode, you will receive one invoice for **Cash Transactions** and another for **Card Transactions**.

After updating the **Status** and **Data Sync Setting** options, click the **Connect to Xero** button, after which you will be redirected to the **Xero** login page, followed by enabling access to your **Xero Account**.

If the connection has been successful, the below will be listed underneath the **Status** and **Data Sync Setting** options:

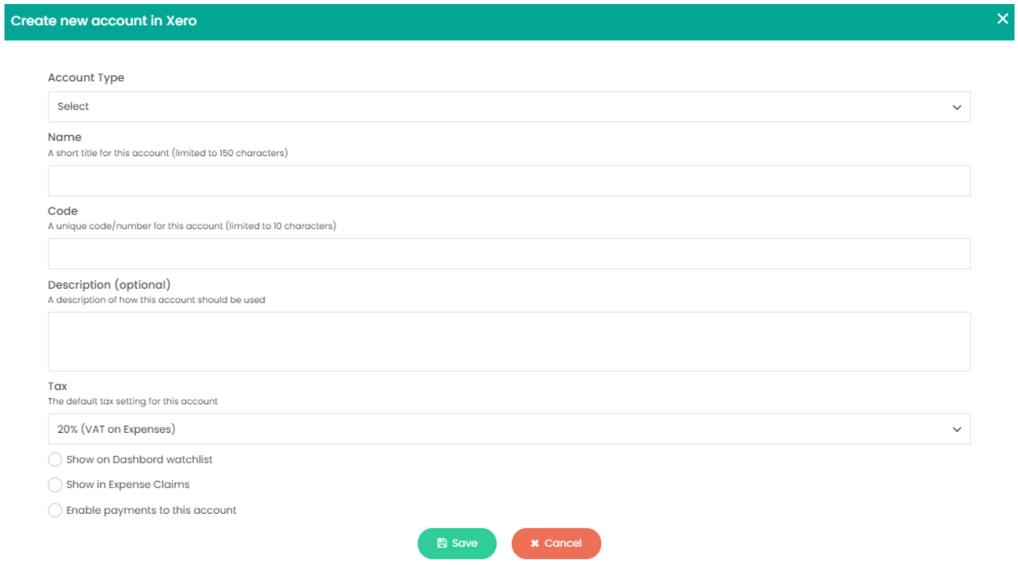


After completing the connection to **Xero**, **Cash & Card Payments** need to be mapped to bank accounts, allowing POS transactions to be reconciled.

Create new account in Xero

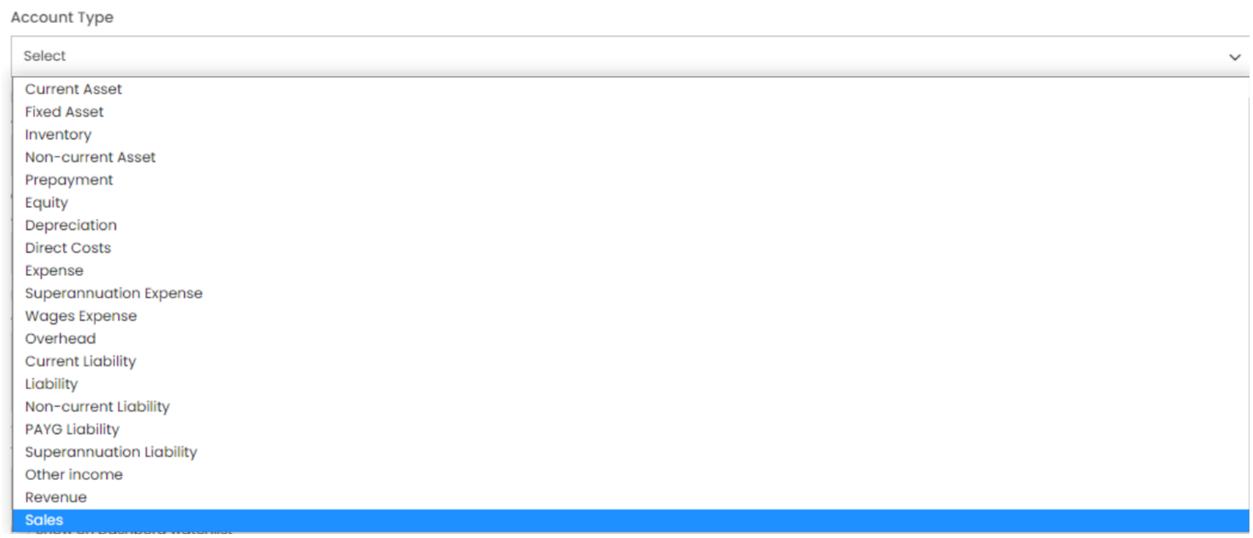
EPOS HYBRID	XERO ACCOUNT	TYPE	TAX RATE	MAPPING TO XERO
Card Payments	200 - Sales	REVENUE	OUTPUT2	epos hybrid xero
Cash Payments	090 - Business Bank Account	ASSET	NONE	epos hybrid xero
Cash Items	200 - Sales	REVENUE	OUTPUT2	epos hybrid xero
Card Items	200 - Sales	REVENUE	OUTPUT2	epos hybrid xero

To add an account, click the **Create New Account in Xero** button to open the below pop-up.



The first dropdown box in the **Create New Account in Xero** pop-up allows you to select the **Account Type**. Use the below dropdown to select the relevant type from the options available.

After updating the **Account Type**, the remaining fields can be entered relevant to the required information in **Xero**.



After the relevant fields have been filled, click **Save** at the bottom of the pop-up to add the account to your list of **Accounts** at the bottom of the page. Repeat the process until all necessary accounts have been added to complete your **Xero Integration**.