

Xero & Ag-drive integration

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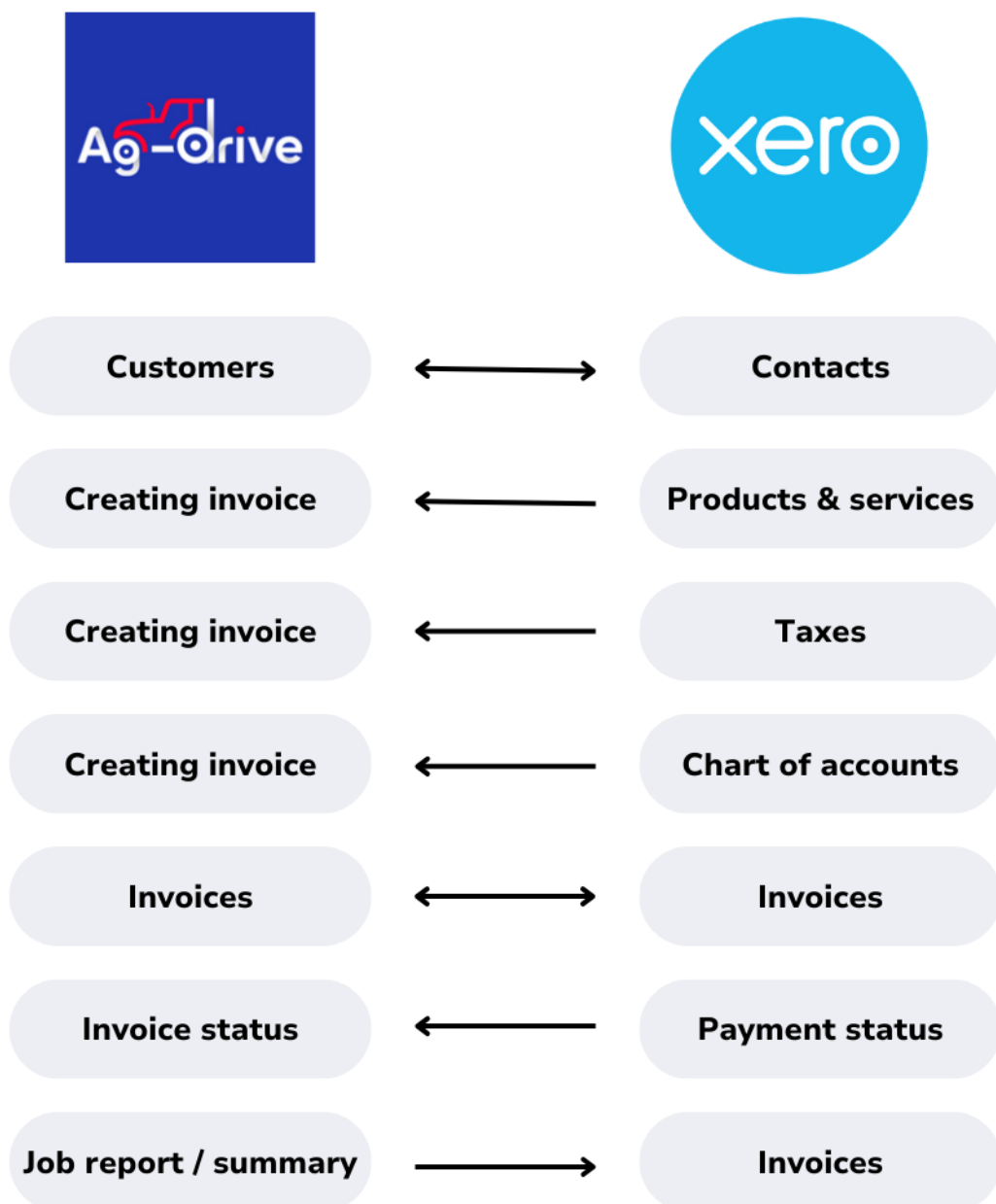
HOW DOES THE AG-DRIVE & XERO INTEGRATION WORK?

Customers can be imported into Ag-drive via Xero and synced back into Xero if changes have been made to the customer in Ag-drive.

Invoices can be sent into your Xero account from jobs recorded in Ag-drive. When an invoice is created your products and services can be auto matched with your Ag-drive job operations, making invoicing from Ag-drive into Xero as easy as a few clicks of a button!

Job reports/summaries can be generated in Ag-drive and can be attached to your Xero invoice that is sent to the customer for full traceability.

Details of how data is shared between Ag-drive and Xero is shown below:



GETTING STARTED

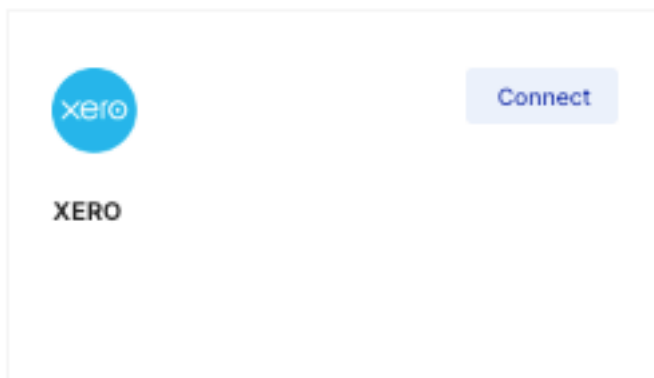
CONNECTING YOUR AG-DRIVE ACCOUNT WITH XERO

Login to your Ag-drive account via the web dashboard at <https://web.ag-drive.com/login>

Go to the “integrations” tab on the left-hand side.

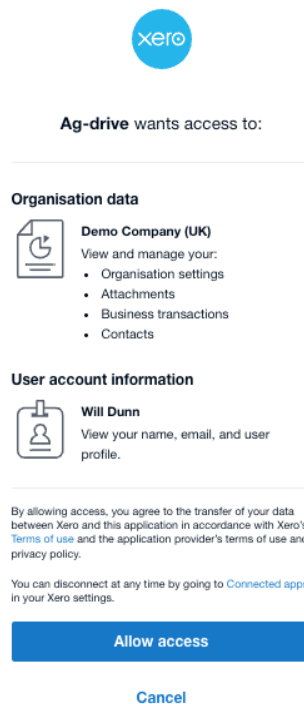
Press connect next to the Xero icon.

tomers and create invoices for one or multiple jobs. You can als

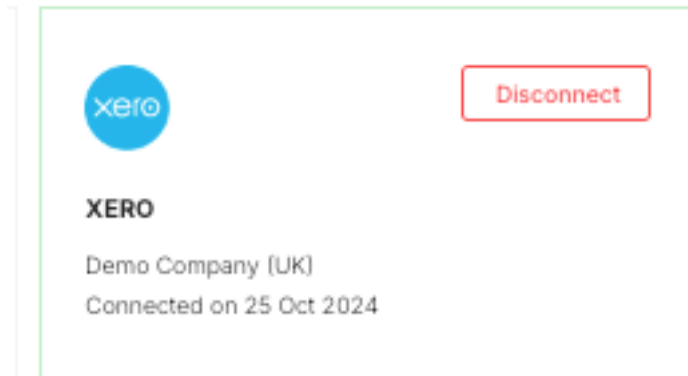


You'll then be redirected to the Xero login page where you'll need to login using your Xero email address and password.

Select the organisation you want to connect and allow access as shown below.



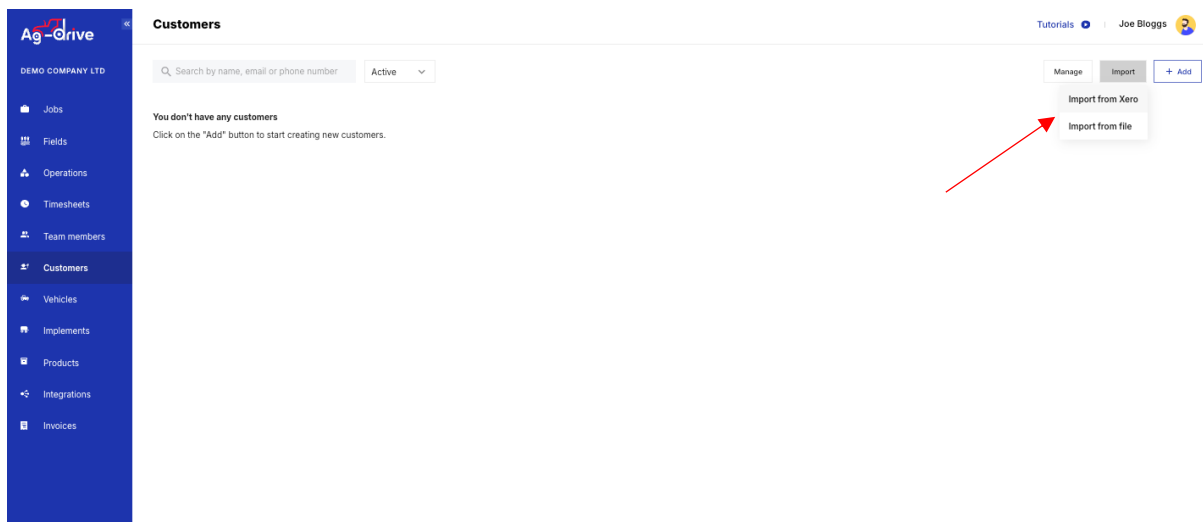
Once connected it will show in the integrations tab, where you can also disconnect at any time by pressing “disconnect”.



IMPORTING CUSTOMERS INTO AG-DRIVE

Customers can be imported into Ag-drive from your Xero contacts in seconds with the Ag-drive and Xero Integration. Once your account Xero account is connected go to the “customers” tab on the left-hand side on the web dashboard.

Then press Import from Xero in the top right-hand corner.



From here you will then be able to select the contacts from Xero you would like to import.

Please note: All Xero contacts will be displayed here so make sure you only import customers only and NOT suppliers as well.

Import Xero Customers x

Search customers Search

Select all

| | | |
|-------------------------------------|---------------------------------|---------------------------------------|
| <input type="checkbox"/> | 7-Eleven | Complete missing info |
| <input type="checkbox"/> | Abby & Wells | Complete missing info |
| <input checked="" type="checkbox"/> | ABC Furniture Trish Rawlings | |
| <input type="checkbox"/> | Bank West | Complete missing info |
| <input checked="" type="checkbox"/> | Basket Case Mary Munn | |
| <input checked="" type="checkbox"/> | Bayside Club Bob Partridge | |
| <input type="checkbox"/> | Bayside Wholesale | Complete missing info |
| <input type="checkbox"/> | Berry Brew | Complete missing info |
| <input type="checkbox"/> | Boom FM | Complete missing info |
| <input type="checkbox"/> | Brunswick Petals | Complete missing info |

Import customers

If you have info missing from the contact, you will need to add in mandatory fields (*) for billing purposes such as Name, Company Name and Address line 1.

Tip: Add N/A in mandatory fields if you don't have the sufficient information.

Update Xero Customer x

Name *
e.g. Alex

Company name *
Bayside Wholesale

Email address
e.g. alex@example.com

Phone number
e.g. 07856633431

Address line 1 *
e.g. Town house Agricultural

Address line 2

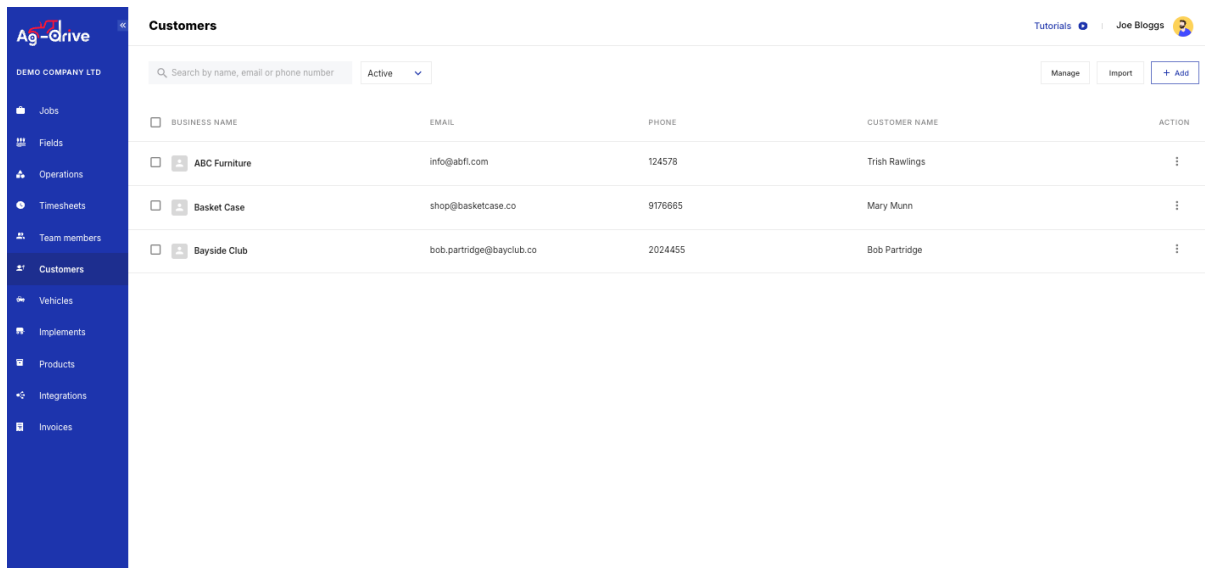
Town/City
e.g. Brentwood

Country
e.g. United Kingdom

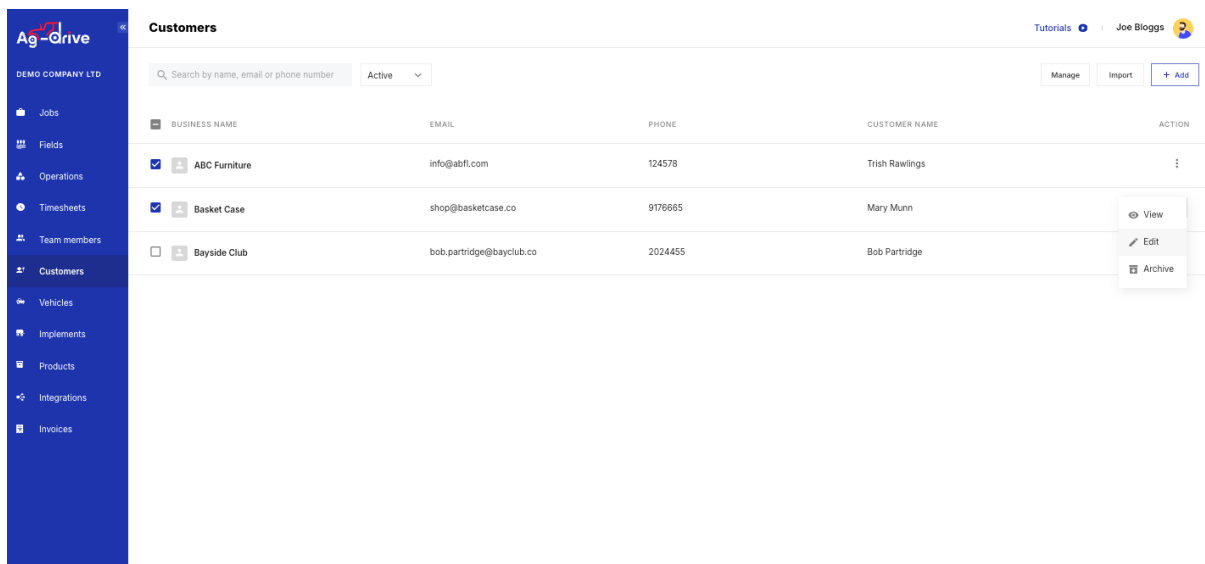
Postal code
e.g. 12KL523

Update ->

Once you've pressed "Import customers" in the bottom right-hand corner your customers should appear in your Ag-drive customer list.



Using the multi select boxes on the left-hand side of the customer you can update the customer from Xero and archive the customer if you wish. You can edit the customer in Ag-drive by clicking the 3 dots in the action column and pressing edit, as shown on the screenshot below.



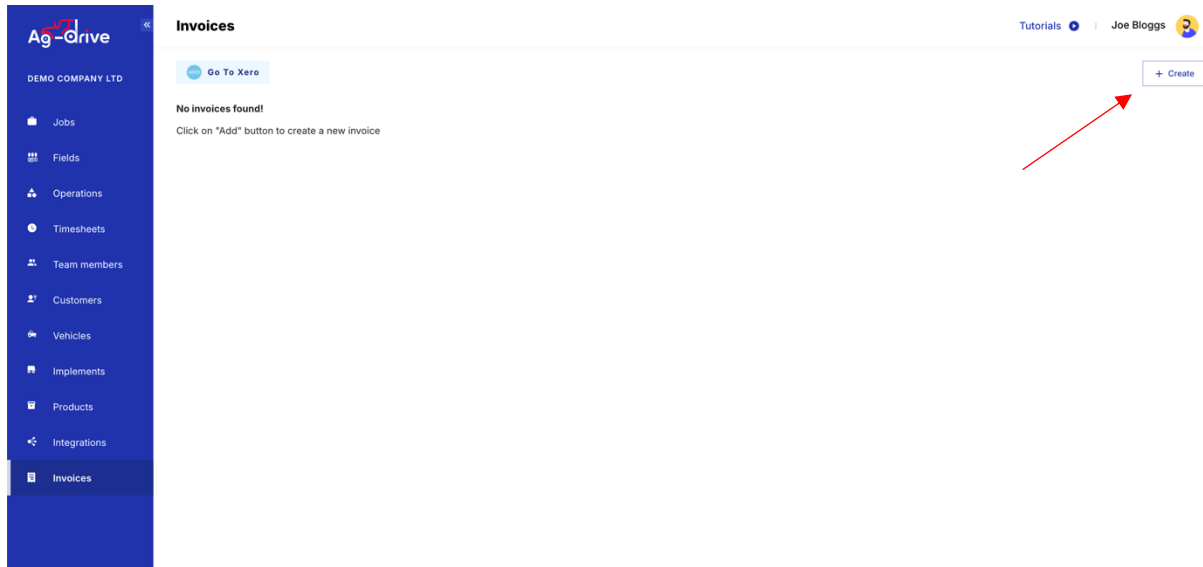
INVOICING FROM AG-DRIVE INTO XERO

Once a job has been recorded on the Ag-drive mobile app it can then be approved for invoicing on the jobs page by pressing “approve” on the right-hand side.

When the job has been approved you can now create a draft invoice which can be sent to Xero.

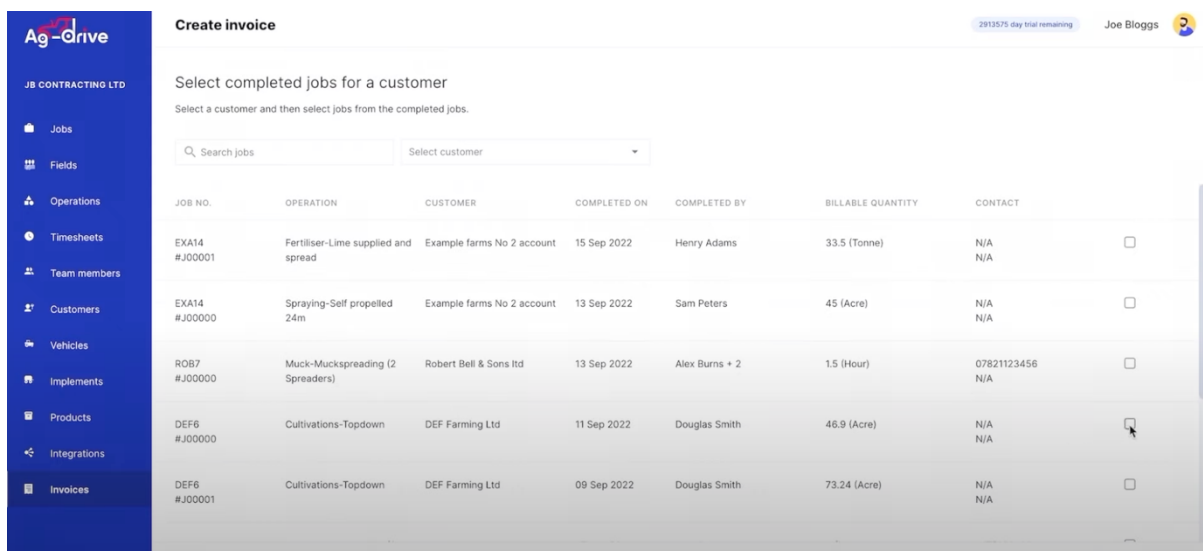
To send an invoice click on the “Invoices” tab in the bottom left-hand corner.

To create an invoice click create in the top right-hand corner



The screenshot shows the 'Invoices' section of the Ag-Drive mobile app. The sidebar on the left lists various menu items, with 'Invoices' selected at the bottom. The main content area displays 'No invoices found!' and a message to click the 'Add' button to create a new invoice. A red arrow points to the '+ Create' button in the top right corner.

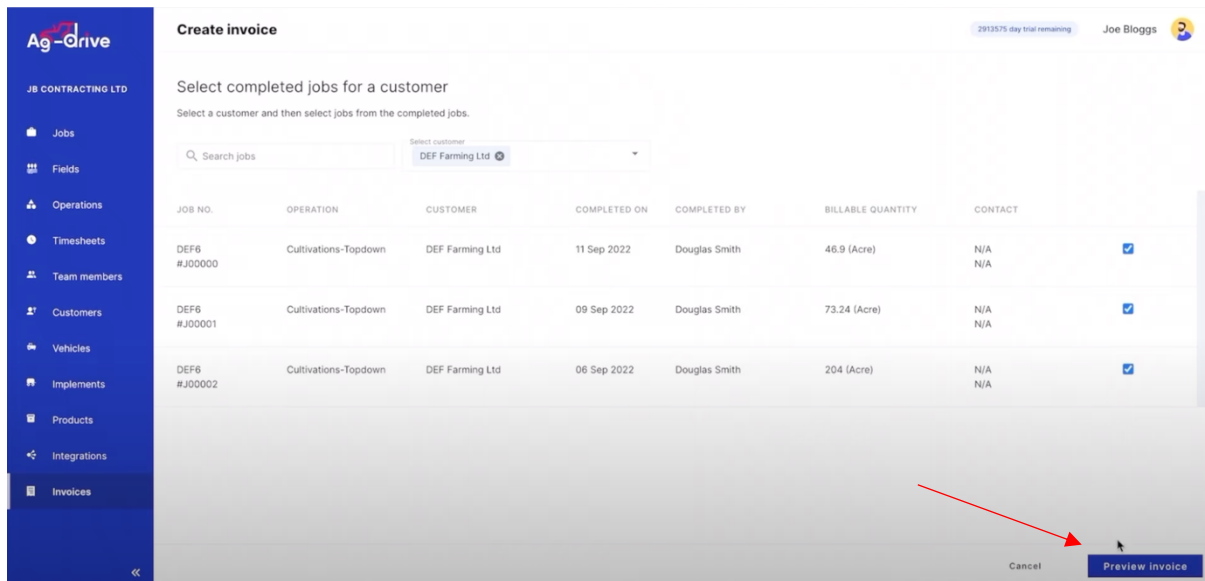
From here it will show all approved jobs



The screenshot shows the 'Create invoice' screen in the Ag-Drive mobile app. It features a search bar for jobs and a dropdown menu for selecting a customer. Below this is a table of completed jobs with the following data:

| JOB NO. | OPERATION | CUSTOMER | COMPLETED ON | COMPLETED BY | BILLABLE QUANTITY | CONTACT | |
|---------------|-------------------------------------|----------------------------|--------------|----------------|-------------------|--------------------|--------------------------|
| EXA14 #J00001 | Fertiliser-Lime supplied and spread | Example farms No 2 account | 15 Sep 2022 | Henry Adams | 33.5 (Tonne) | N/A N/A | <input type="checkbox"/> |
| EXA14 #J00000 | Spraying-Self propelled 24m | Example farms No 2 account | 13 Sep 2022 | Sam Peters | 45 (Acre) | N/A N/A | <input type="checkbox"/> |
| ROB7 #J00000 | Muck-Muckspreading (2 Spreaders) | Robert Bell & Sons ltd | 13 Sep 2022 | Alex Burns + 2 | 1.5 (Hour) | 07821123456 N/A | <input type="checkbox"/> |
| DEF6 #J00000 | Cultivations-Topdown | DEF Farming Ltd | 11 Sep 2022 | Douglas Smith | 46.9 (Acre) | N/A N/A | <input type="checkbox"/> |
| DEF6 #J00001 | Cultivations-Topdown | DEF Farming Ltd | 09 Sep 2022 | Douglas Smith | 73.24 (Acre) | N/A N/A | <input type="checkbox"/> |

Then once you've selected one job it will filter search all the jobs for that customer. You can select as many jobs as you like for the invoice. After you've selected the jobs press "preview invoice".

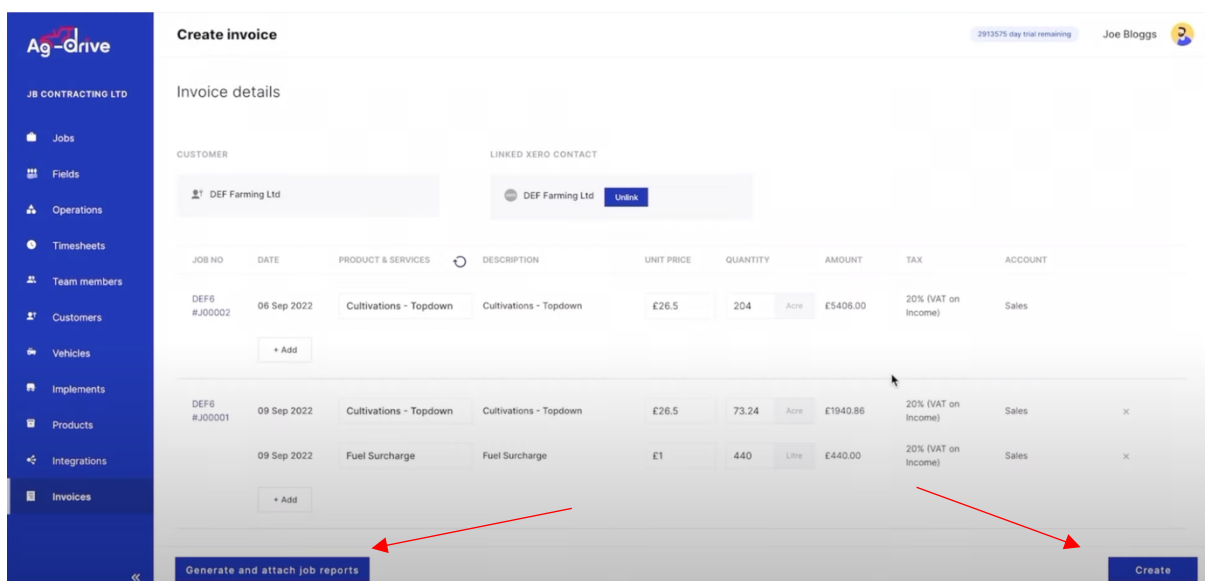


If your sub-operation name in Ag-drive is named the same as your "product and service" setup in Xero it will auto select the product and service when you are creating the invoice. The product and service can be changed by clicking on the text where it will fetch all the products and services setup in Xero. The unit price, tax and chart of account will be dictated by the product and service that has been selected and can be changed if needed.

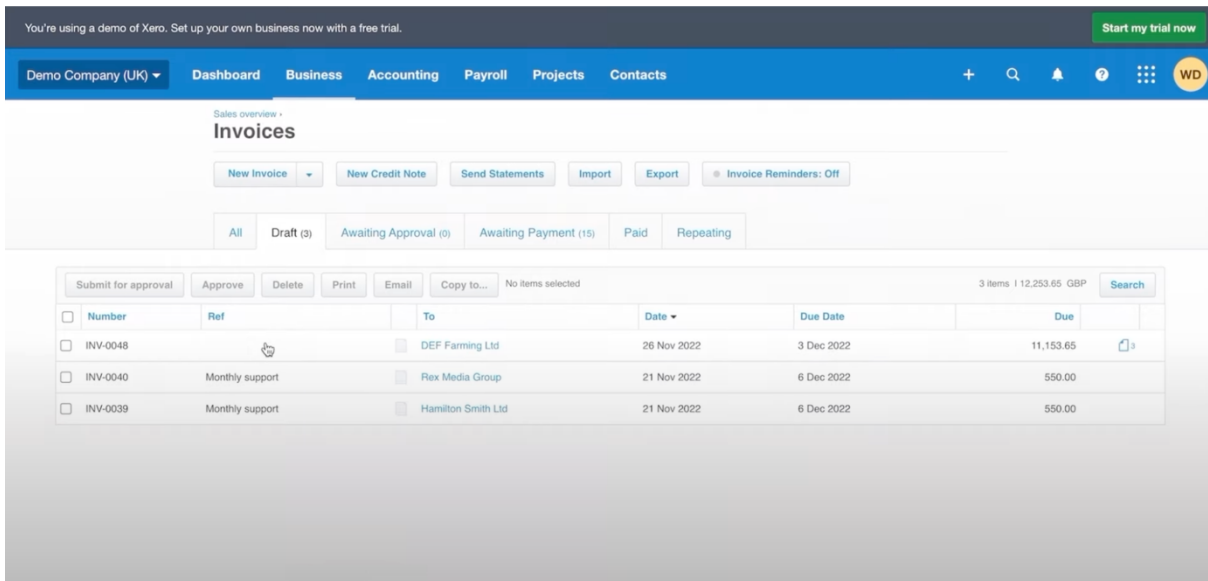
The quantity comes from information entered on the Ag-drive job recording by the operator, which again can be changed if needed.

TOP TIP: Name your operations in Ag-drive the exact same as your products and services in Xero (vice versa)

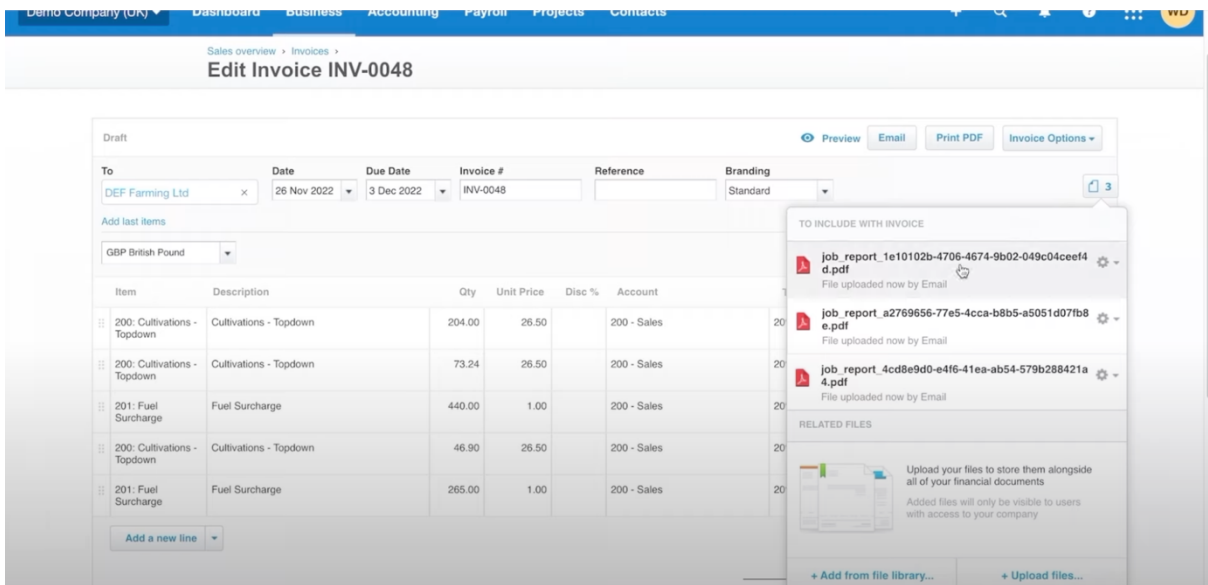
Job reports generated from Ag-drive can be attached to the invoice if you press "generate and attach job reports" in the bottom left-hand corner. Then when you are ready to send the invoice into Xero press create in the bottom right-hand corner.



The invoice will be sent into Xero as a draft and can be viewed on the invoices page on Xero.



The invoice can be edited if a mistake has been whilst drafting the invoice in Ag-drive. You can also view the job reports that will be sent with the Invoice.



If the invoice details are correct, you can press approve and send as you would to send an email invoice in Xero.

Draft Preview Email Print PDF Invoice Options

To: DEF Farming Ltd 3

Date: 26 Nov 2022 Due Date: 3 Dec 2022 Invoice #: INV-0048 Reference: Branding: Standard

Add last items

GBP British Pound Amounts are Tax Exclusive

| Item | Description | Qty | Unit Price | Disc % | Account | Tax Rate | Region | Amount GBP |
|-----------------------------|------------------------|--------|------------|--------|-------------|---------------------|--------|------------|
| 200: Cultivations - Topdown | Cultivations - Topdown | 204.00 | 26.50 | | 200 - Sales | 20% (VAT on Income) | | 5,406.00 |
| 200: Cultivations - Topdown | Cultivations - Topdown | 73.24 | 26.50 | | 200 - Sales | 20% (VAT on Income) | | 1,940.86 |
| 201: Fuel Surcharge | Fuel Surcharge | 440.00 | 1.00 | | 200 - Sales | 20% (VAT on Income) | | 440.00 |
| 200: Cultivations - Topdown | Cultivations - Topdown | 46.90 | 26.50 | | 200 - Sales | 20% (VAT on Income) | | 1,242.85 |
| 201: Fuel Surcharge | Fuel Surcharge | 265.00 | 1.00 | | 200 - Sales | 20% (VAT on Income) | | 265.00 |

Subtotal: 9,294.71
Total VAT 20.00%: 1,858.94
TOTAL 11,153.65

Save Approve Cancel

Invoice approved Add Another Invoice

Awaiting Payment

To: DEF Farming Ltd Total 11,153.65

Date: 26 Nov 2022 Due Date: 3 Dec 2022 Invoice #: INV-0048 Branding: Standard

No address Amounts are Tax Exclusive

Add address

Item Code Description Qty

| | | |
|-----|------------------------|--------|
| 200 | Cultivations - Topdown | 204.00 |
| 200 | Cultivations - Topdown | 73.24 |
| 201 | Fuel Surcharge | 440.00 |
| 200 | Cultivations - Topdown | 46.90 |
| 201 | Fuel Surcharge | 265.00 |

Subtotal: 9,294.71
Total VAT 20%: 1,858.94
TOTAL 11,153.65

Reply to: will@ag-drive.com

Email template: Sales Invoice: Basic Show placeholder info

Subject: Invoice INV-0048 from Demo Company (UK) for DEF Farming Ltd

Message: Hi DEF Farming Ltd,
Here's invoice INV-0048 for EGBP 11,153.65.
The amount outstanding of EGBP 11,153.65 is due on 03 Dec 2022.
View and pay your bill online: [Online Invoice Link]
From your online bill you can print a PDF, export a CSV, or create a free login and view your outstanding bills.
If you have any questions, please let us know.
Thanks,
Demo Company (UK)

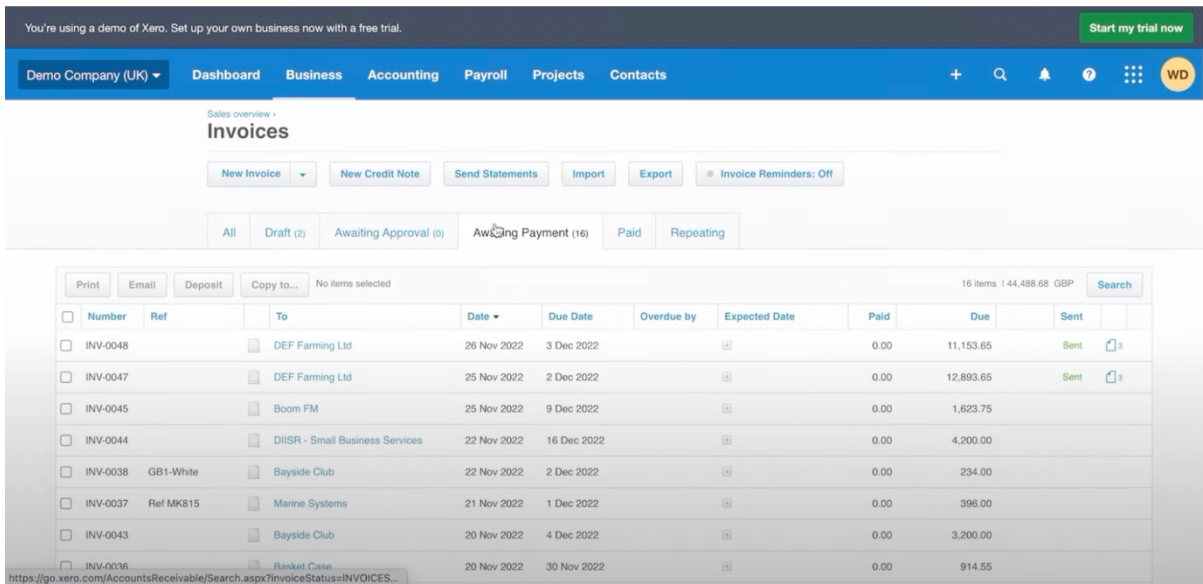
Included files:

- job_report_1e10102b-4706-4674-9b02-049c04cee4d.pdf (365.57KB) Remove
- job_report_a2769656-77e5-4cca-b8b5-a5051d07fb8e.pdf (372.25KB) Remove
- job_report_4cd8e9d0-e4f6-41ea-ab54-579b288421a4.pdf (394.49KB) Remove

Include files as attachments
 Include PDF attachment
 Mark as sent
 Send me a copy (will@ag-drive.com)

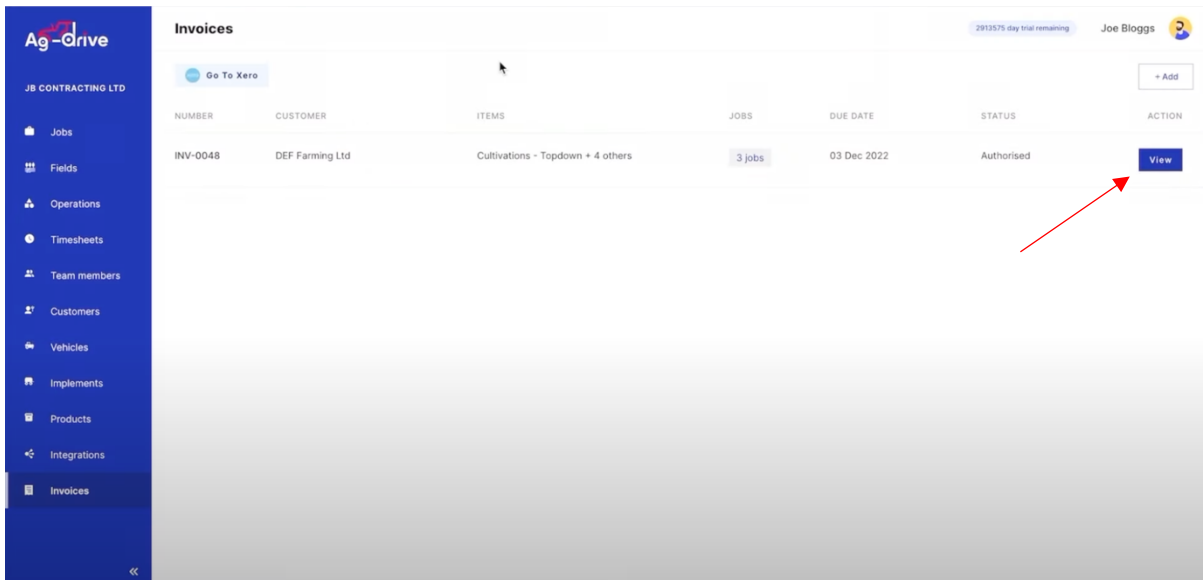
Send Cancel

The sent invoices can be viewed in Xero and in Ag-drive.



The screenshot shows the Xero 'Invoices' page. At the top, there's a navigation bar with 'Demo Company (UK)' and various menu items like 'Dashboard', 'Business', 'Accounting', 'Payroll', 'Projects', and 'Contacts'. Below this, there are buttons for 'New Invoice', 'New Credit Note', 'Send Statements', 'Import', 'Export', and 'Invoice Reminders: Off'. A filter bar shows 'All', 'Draft (2)', 'Awaiting Approval (0)', 'Awaiting Payment (16)', 'Paid', and 'Repeating'. The main area is a table of invoices with columns for 'Number', 'Ref', 'To', 'Date', 'Due Date', 'Overdue by', 'Expected Date', 'Paid', 'Due', and 'Sent'. The table lists several invoices, including INV-0048, INV-0047, INV-0045, INV-0044, INV-0038, INV-0037, INV-0043, and INV-0036. A 'View' button is visible on the right side of the first row.

If you press view on the right-hand side, it will open the specific invoice in another tab on Xero.



The screenshot shows the Ag-Drive 'Invoices' page. On the left is a blue sidebar with the Ag-Drive logo and a list of menu items: 'JB CONTRACTING LTD', 'Jobs', 'Fields', 'Operations', 'Timesheets', 'Team members', 'Customers', 'Vehicles', 'Implements', 'Products', 'Integrations', and 'Invoices'. The main area is titled 'Invoices' and has a 'Go To Xero' button. Below this is a table with columns: 'NUMBER', 'CUSTOMER', 'ITEMS', 'JOBS', 'DUE DATE', 'STATUS', and 'ACTION'. The table contains one row for invoice INV-0048, with customer 'DEF Farming Ltd', items 'Cultivations - Topdown + 4 others', 3 jobs, due date '03 Dec 2022', and status 'Authorised'. A red arrow points to a 'View' button in the 'ACTION' column.

FREQUENTLY ASKED QUESTIONS

[How do I connect my Xero account to Ag-drive?](#)

Go to the “Getting started” chapter for the step-by-step guide. Connect your account from the integrations tab on the left-hand side on Ag-drive

[How do I disconnect my Xero account to Ag-drive?](#)

Go to the “Getting started” chapter for the step-by-step guide. Disconnect your account by selecting disconnect on the integrations page on Ag-drive. The account can be disconnected from your settings in Xero under “connected apps”.

[Can I edit the invoice when it's sent into Xero?](#)

Yes, invoices sent from Ag-drive into Xero are sent as drafts so can still be edited.

[Can I import products and services into Ag-drive?](#)

Currently, no

[Does Ag-drive link into Xero payroll?](#)

Currently, no

[The customer I'm trying to import has “complete missing info” next to it?](#)

Make sure the contact in Xero has a name, business name and address line 1 filled in. If information is not available enter N/A.

[I can't import a customer as it says its already imported?](#)

Double check the email address and make sure the email is not the same, as we identify each unique user in Ag-drive by email address. For multiple businesses with the same email address remove the email address and import the customer into Ag-drive and add the email back onto the Xero contact after you've done the import.

[Can I link a customer in Ag-drive that I've already created to a contact in Xero?](#)

Yes, but only on the draft invoice page in Ag-drive where you'll be able to press “link” next to the customer's name.

VIDEO TUTORIALS

Integrating your Xero account tutorial:

<https://www.youtube.com/watch?v=wiEOP14wxSl&list=PLQ3TpRx5ipsdmc39hihBpMaCyyu5Q0NzL&index=8>

Xero invoicing tutorial -

<https://www.youtube.com/watch?v=8SXYv34mnzA&list=PLQ3TpRx5ipsdmc39hihBpMaCyyu5Q0NzL&index=16>