



FLEET CARD & XERO INTEGRATION: MAKING ACCOUNTING EASY



XERO + FLEET CARD:

HOW TO CONNECT YOUR FLEET CARD ACCOUNT TO XERO

It's never been easier to keep track of your Fleet Card transactions thanks to our new Xero integration. Xero and Fleet Card integrate seamlessly, so you can map your transactions to your expense account without any hassle.

All you need to do is follow this quick guide to connect Fleet Card to Xero – it only takes a minute.

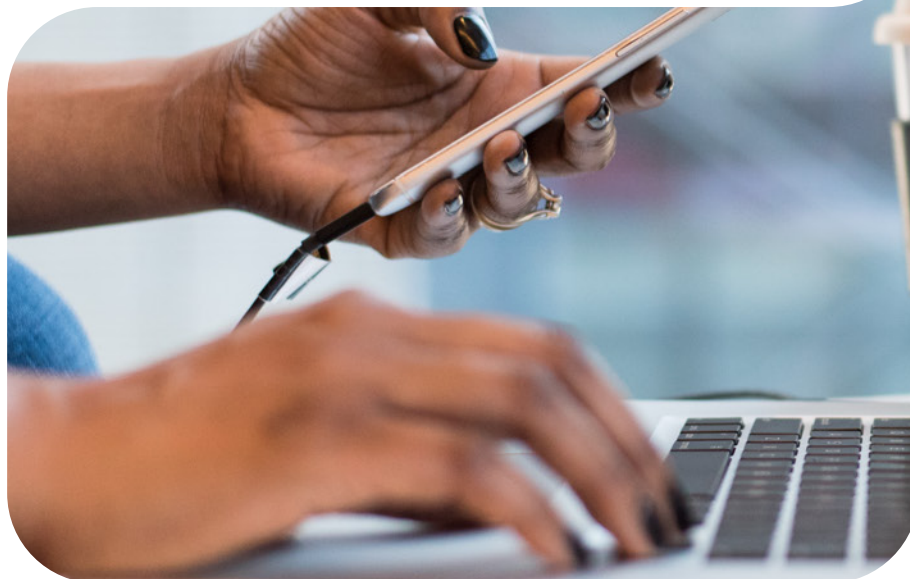
When your Fleet Card and Xero accounts are connected, your Fleet Card invoices feed directly into Xero, where you can see your transactions and keep your expense account up to date.

You can choose which expense account to connect to, and how your invoices will display in Xero, either with individual transactions or a simple summary.



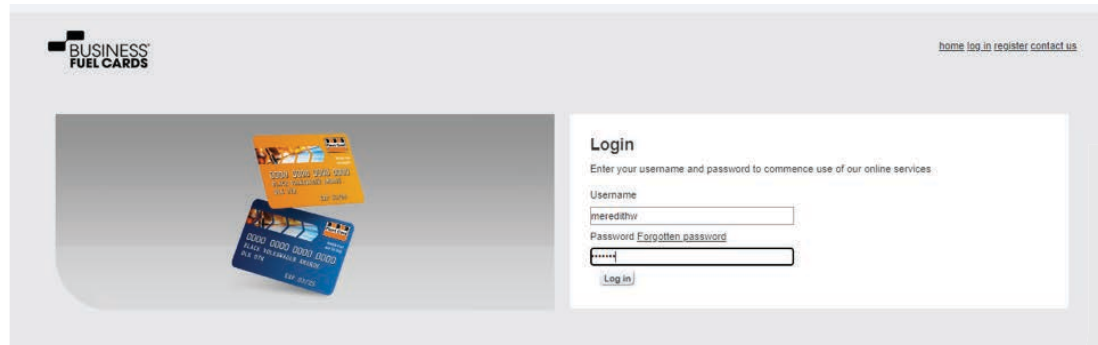
BEFORE YOU START

To sign up for a Fleet Card Online account, please refer to <https://www.fleetcard.com.au/online-user-guide-file/> for instructions:



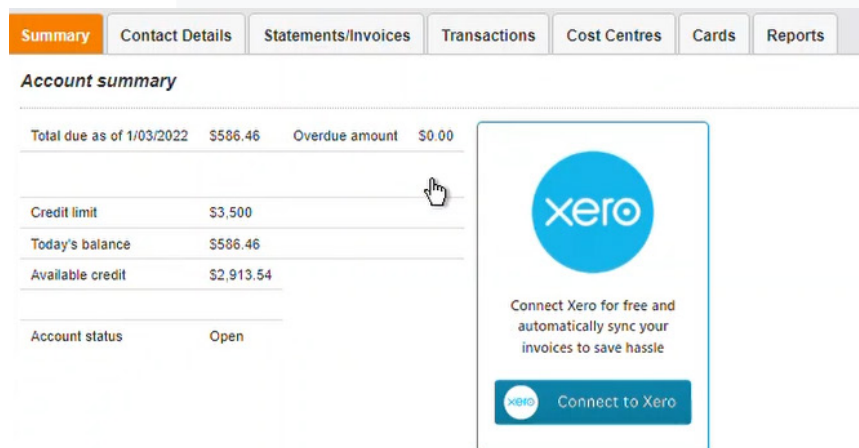
STEP 1. LOG INTO YOUR FLEET CARD ACCOUNT.

On the main summary page, you will see the option to connect to Xero.



STEP 2. CLICK “CONNECT TO XERO”

You will be guided through a connection process to link your Fleet Card account with Xero.



STEP 3. LOG INTO YOUR XERO ACCOUNT

If you don't already have a Xero account, select "sign up" at the bottom of the pop-up.




Log in to Xero

Log in

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


Depending on your account, you may be asked to complete the multi-factor authentication to access your account. Follow the instructions to log in.

STEP 4. SELECT YOUR ORGANISATION



Fleetcard UAT wants access to:

Organisation data




1 connected organisation
View and manage your:

- File library
- Attachments
- Business transactions
- Contacts

View your:

- Organisation settings

User account information



Person 1
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.

Continue with 1 organisation

[Cancel](#)

If prompted, select the organisation you want to link to Fleet Card from the drop-down menu.

Click "Allow access" to the Fleet Card app at the bottom of the page. This will complete the integration, and you will be redirected back to the Fleet Card portal.

STEP 5. SELECT THE XERO EXPENSE ACCOUNT

On the pop-up window, select the Xero expense account you want Fleet Card invoices to sync to, and the applicable tax rate. You can always change this later if needed.

The screenshot shows the Xero Business Fuel Cards account setup interface. A pop-up window titled "Accounts" is open, displaying a list of expense accounts. The account "310 Cost of Goods Sold" is selected. The background shows the "Account summary" section with a total due of \$586.46 and a "Pay Now" button.

Accounts

- 310 Cost of Goods Sold
- 310 Cost of Goods Sold
- 400 Advertising
- 404 Bank Fees
- 408 Cleaning
- 412 Consulting & Accounting
- 418 Depreciation
- 420 Entertainment
- 425 Freight & Courier
- 429 General Expenses
- 433 Insurance
- 437 Interest Expense
- 441 Legal expenses
- 445 Light, Power, Heating
- 449 Motor Vehicle Expenses
- 453 Office Expenses
- 461 Printing & Stationery
- 469 Rent
- 473 Repairs and Maintenance
- 477 Wages and Salaries
- 478 Superannuation

Account summary

Total due as of 1/03/2022: \$586.46 Overdue amount: \$0.00

Credit limit: Available on: Account status:

Amount Payable: \$ 586.46

GST that will apply: ☐ Yes ☒ No 12.1% 12.50%

Terms & Conditions: ☐ Yes ☒ No

Pay Now

STEP 6. CHOOSE HOW YOU WANT INVOICES SYNCED

Select how you would like your invoices synced to Xero. You have two options:

1. **Send a summary:** This sends an invoice summary to Xero with totals and subtotals of the monthly invoice.
2. **Send individual transactions:** This contains summary and a breakdown of every transaction on the invoice.

Select your preferred option and click "Submit change".

The screenshot shows the 'Business Fuel Cards' website interface. At the top, there's a header with the logo and the tagline 'Smarter solutions for evolving businesses'. A user is logged in, as indicated by 'Welcome [username] profile'. Below the header, there are two main navigation tabs: 'Manage Account' (active) and 'Update My Profile'.

The 'Manage Account' section is divided into two columns. The left column has a 'Recent Accounts' section with an 'Account name' field and a 'Quick Links' section with links: 'Manage card (products, limits...)', 'View an invoice', 'Run a transaction report', 'Update contact details', and 'Find merchant'. The right column is titled 'Account - (Account name)' and has several sub-tabs: 'Summary' (active), 'Contact Details', 'Statements/Invoices', 'Transactions', 'Cost Centres', 'Cards', and 'Reports'.

The 'Summary' tab displays an 'Account summary' section with the following data:

Account summary		
Total due as of 1/03/2022	\$596.46	Overdue amount: \$0.00
Credit limit	\$3,500	
Today's balance	\$596.46	
Available credit	\$2,913.54	
Account status	Open	

Below the summary, there's a Xero integration section. It features the Xero logo and the text: 'Connect Xero for free and automatically sync your invoices to save hassle'. There are two buttons: 'Disconnect from Xero' and 'Edit expense account'. Below this, it says 'Connected to Christchurch Company'.

At the bottom of the Xero section, there's a 'How invoices are sent:' section with two radio buttons: 'Send a summary' (selected) and 'Send individual transactions'. A 'Submit change' button is next to the 'Send a summary' option.

Below the Xero section, there's a 'Credit Card Payment' section. It has a field for 'Amount Payable: \$' with the value '\$596.46'. Below this, there's a checkbox for 'I accept the Credit Card fee (incl GST) that will apply:' with a 'Yes' option. Below the checkbox, there are logos for VISA (1.15%), Mastercard (1.21%), and American Express (2.50%). At the bottom, there's a checkbox for 'I have read and accept the Fleet Card Terms & Conditions:' with a 'Yes' option. A 'Pay Now' button is at the bottom right.

THAT'S IT!

Your Xero + Fleet Card integration is complete.

Your next Fleet Card invoice will automatically be synced to your Xero account and mapped to your chosen expense account.

Want to make any changes?

Making changes is easy! Simply go back to the Fleet Card summary page and edit your expense account or how the invoices are sent. Here, you can also disconnect Fleet Card from Xero if needed.



ANY QUESTIONS?

If you have any questions about your Xero and Fleet Card integration, contact our team on **1300 881 246** or email us at **customer@bfcards.com.au**.