

# **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.

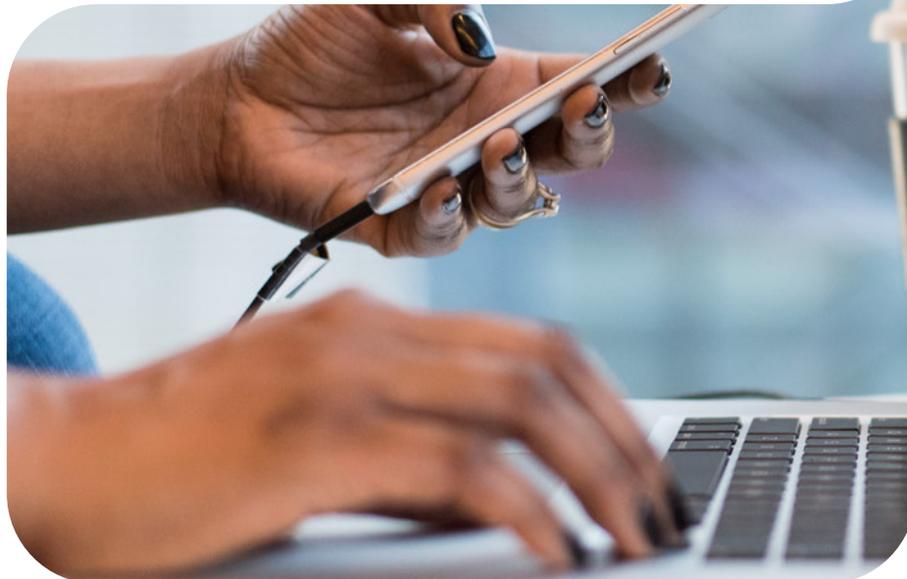
When your Fleet Card and Xero accounts are connected, your Fleet Card invoices feed directly into Xero, where you can see your transactions and keep your expense account up to date.

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.



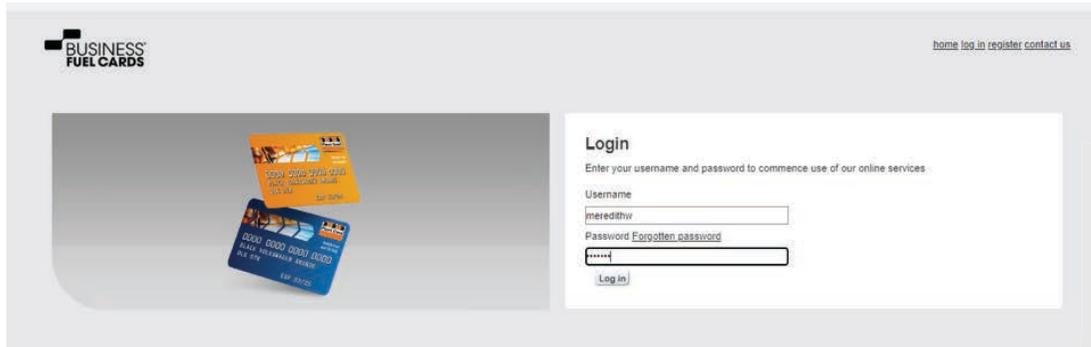
## BEFORE YOU START

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



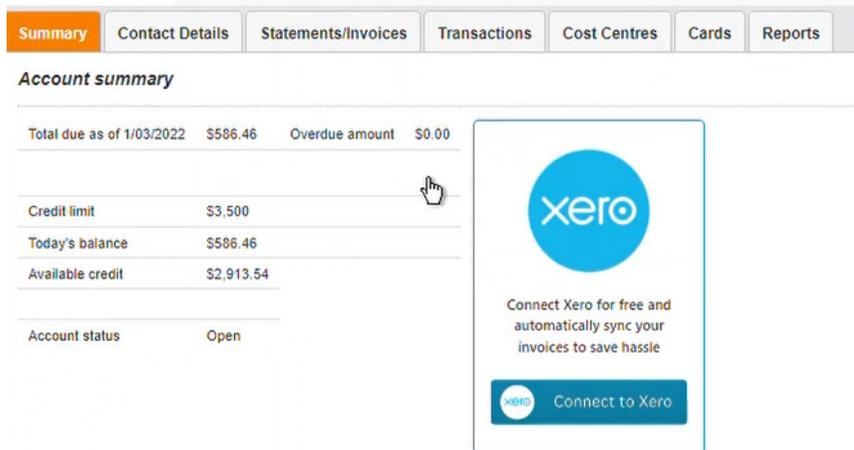
## STEP 1. LOG INTO YOUR FLEET CARD ACCOUNT.

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.

A screenshot of the Business Fuel Cards account summary page. The top navigation bar includes tabs for 'Summary', 'Contact Details', 'Statements/Invoices', 'Transactions', 'Cost Centres', 'Cards', and 'Reports'. The 'Summary' tab is active. Below the navigation bar, the page title is 'Account summary'. A table displays account details: 'Total due as of 1/03/2022' is \$586.46, 'Overdue amount' is \$0.00, 'Credit limit' is \$3,500, 'Today's balance' is \$586.46, 'Available credit' is \$2,913.54, and 'Account status' is 'Open'. A mouse cursor is pointing at the 'Credit limit' row. A large blue overlay box is positioned on the right side of the page, featuring the Xero logo and the text 'Connect Xero for free and automatically sync your invoices to save hassle'. At the bottom of the overlay is a button labeled 'XERO Connect to Xero'.

## STEP 3. LOG INTO YOUR XERO ACCOUNT

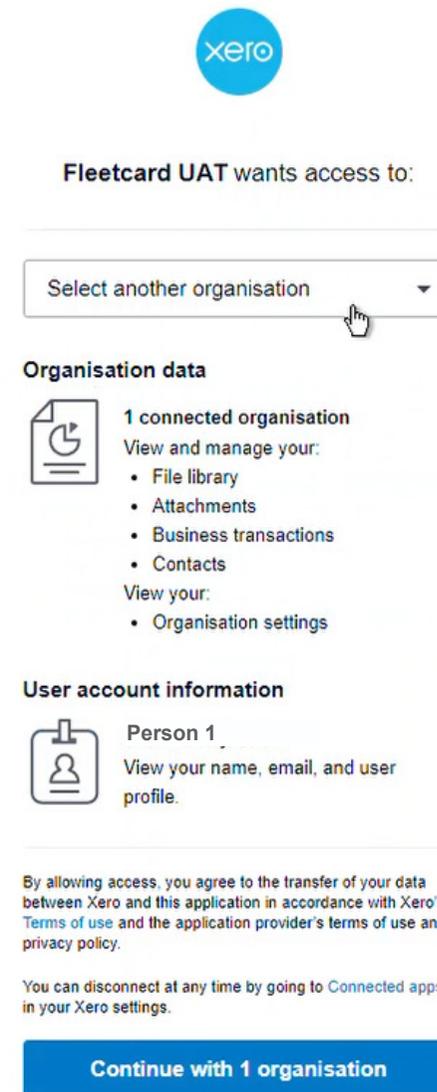
If you don't already have a Xero account, select "sign up" at the bottom of the pop-up.



The image shows the Xero login interface. At the top is the Xero logo. Below it is the text "Log in to Xero". There are two input fields: the first contains the email address "Person@example.com" and the second contains a masked password ".....". Below the input fields is a blue "Log in" button. At the bottom, there are two links: "Forgot password?" and "Can't log in?". A mouse cursor is pointing at the "Can't log in?" link.

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



The image shows the Xero organisation selection screen. At the top is the Xero logo. Below it is the text "Fleetcard UAT wants access to:". There is a dropdown menu with the text "Select another organisation" and a hand cursor pointing to it. Below the dropdown is the "Organisation data" section, which includes a document icon, the text "1 connected organisation", and a list of permissions: "View and manage your:" followed by "File library", "Attachments", "Business transactions", and "Contacts". Below this is "View your:" followed by "Organisation settings". The "User account information" section includes a person icon, the text "Person 1", and "View your name, email, and user profile.". At the bottom, there is a blue "Continue with 1 organisation" button.

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.

Cancel

## 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 displays the 'Business Fuel Cards' account management interface. The main heading is 'Account', with a sub-heading 'Account summary'. A navigation bar includes tabs for 'Summary', 'Contact Details', 'Statements/Invoices', 'Transactions', 'Cost Centres', 'Cards', and 'Reports'. The 'Summary' tab is active, showing 'Total due as of 1/03/2022: \$586.46' and 'Overdue amount: \$0.00'. A 'Credit limit' section is visible, along with 'Today's balance' and 'Available on'. A 'Pay Now' button is present at the bottom right. A 'Quick Links' sidebar on the left includes options like 'Manage card (products, limits...)', 'View an invoice', 'Run a transaction report', 'Update contact details', and 'Find merchant'. A 'Recent Accounts' section is also present. A 'Xero' pop-up window is overlaid on the main content, displaying a list of 'Accounts' with '310 Cost of Goods Sold' selected. The list includes various expense categories such as Advertising, Bank Fees, Cleaning, Consulting & Accounting, Depreciation, Entertainment, Freight & Courier, General Expenses, Insurance, Interest Expense, Legal expenses, Light, Power, Heating, Motor Vehicle Expenses, Office Expenses, Printing & Stationery, Rent, Repairs and Maintenance, Wages and Salaries, and Superannuation. The 'Xero' logo is prominently displayed in the center of the pop-up window.

## 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 Xero Business Fuel Cards account management interface. The top navigation bar includes the logo, the text "Smarter solutions for evolving businesses", and a user profile link. Below the navigation bar are two tabs: "Manage Account" (active) and "Update My Profile".

The main content area 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 the following information:

- 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

On the right side of the summary, there is a Xero logo and a message: "Connect Xero for free and automatically sync your invoices to save hassle." Below this is a "Disconnect from Xero" button and an "Edit expense account" link. It also shows "Connected to Christchurch Company".

At the bottom of the summary section, there is a section titled "How invoices are sent:" with two radio button options: "Send a summary" (selected) and "Send individual transactions". A "Submit change" button is located below these options.

Below the summary section, there is a "Credit Card Payment" section. It includes a field for "Amount Payable: \$ 666.46". There are two checkboxes: "I accept the Credit Card fee (incl GST) that will apply:" (unchecked) and "I have read and accept the Fleet Card Terms & Conditions:" (unchecked). Below these are logos for VISA (1.15%), Mastercard (1.21%), and American Express (2.50%). A "Pay Now" button is at the bottom right of this section.

## **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](mailto:customer@bfcards.com.au)**.