FLEETCARD & XERO INTEGRATION: MAKING ACCOUNTING EASY

XERO + FLEETCARD:

HOW TO CONNECT YOUR FLEETCARD ACCOUNT TO XERO

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

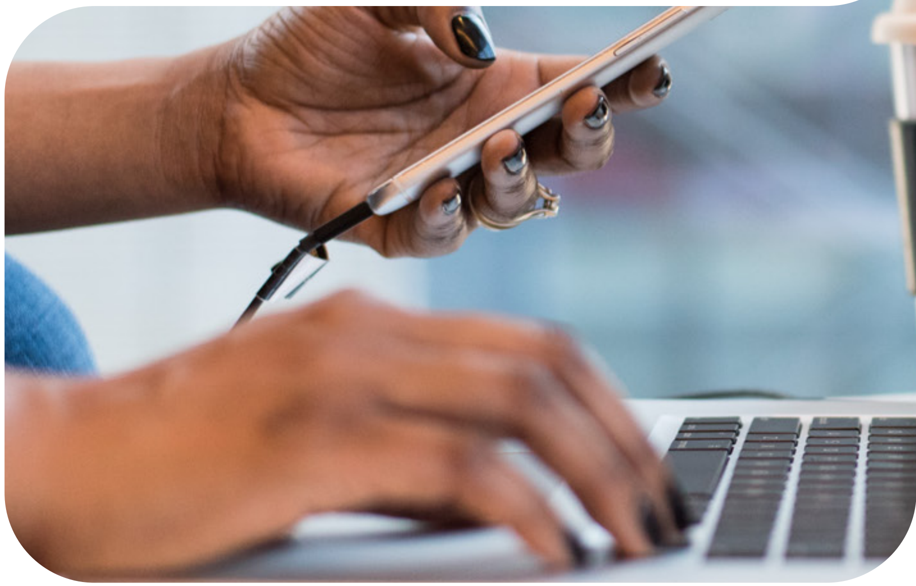
All you need to do is follow this quick guide to connect FleetCard to Xero – it only takes a minute.

When your FleetCard and Xero accounts are connected, your FleetCard 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.

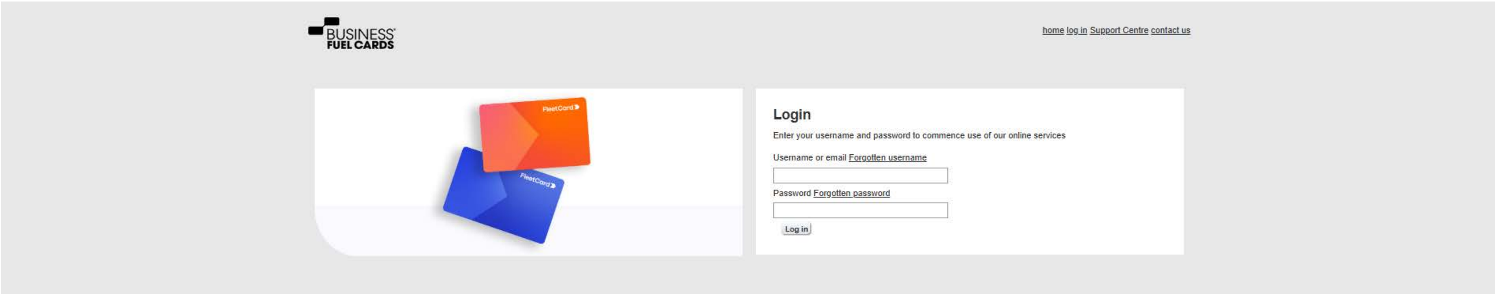
BEFORE YOU START

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



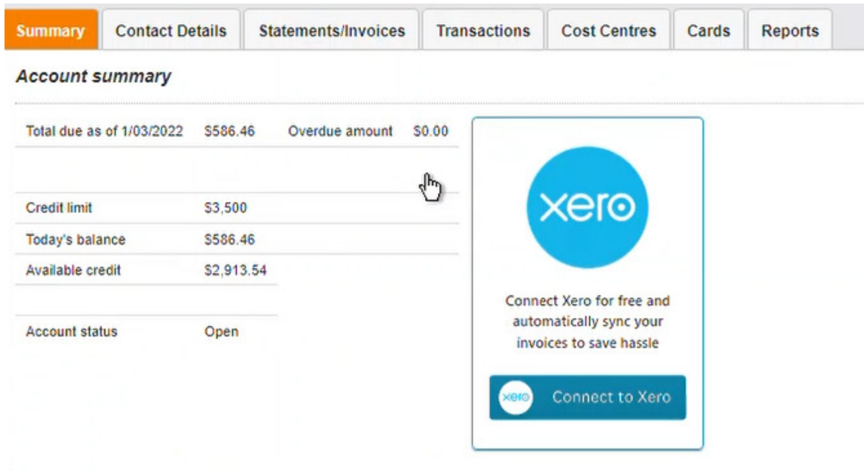
STEP 1. LOG INTO YOUR FLEETCARD ACCOUNT.

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



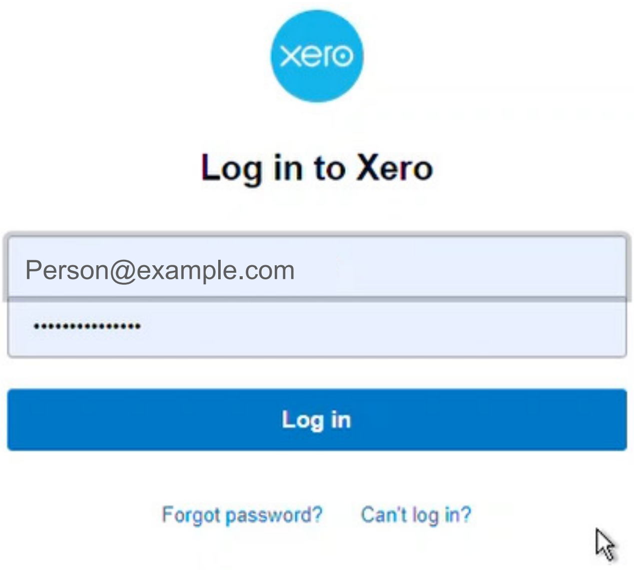
STEP 2. CLICK "CONNECT TO XERO"

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



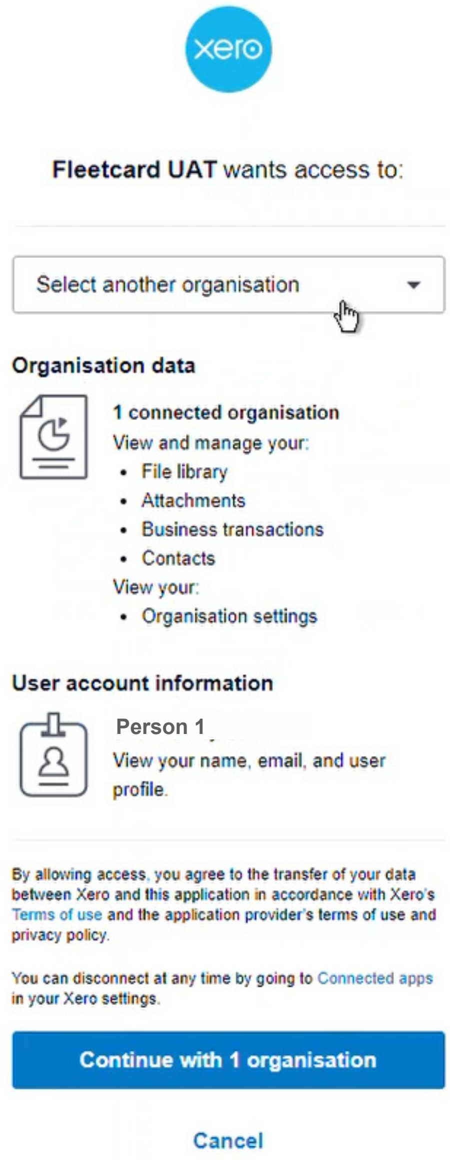
STEP 3. LOG INTO YOUR XERO ACCOUNT

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



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

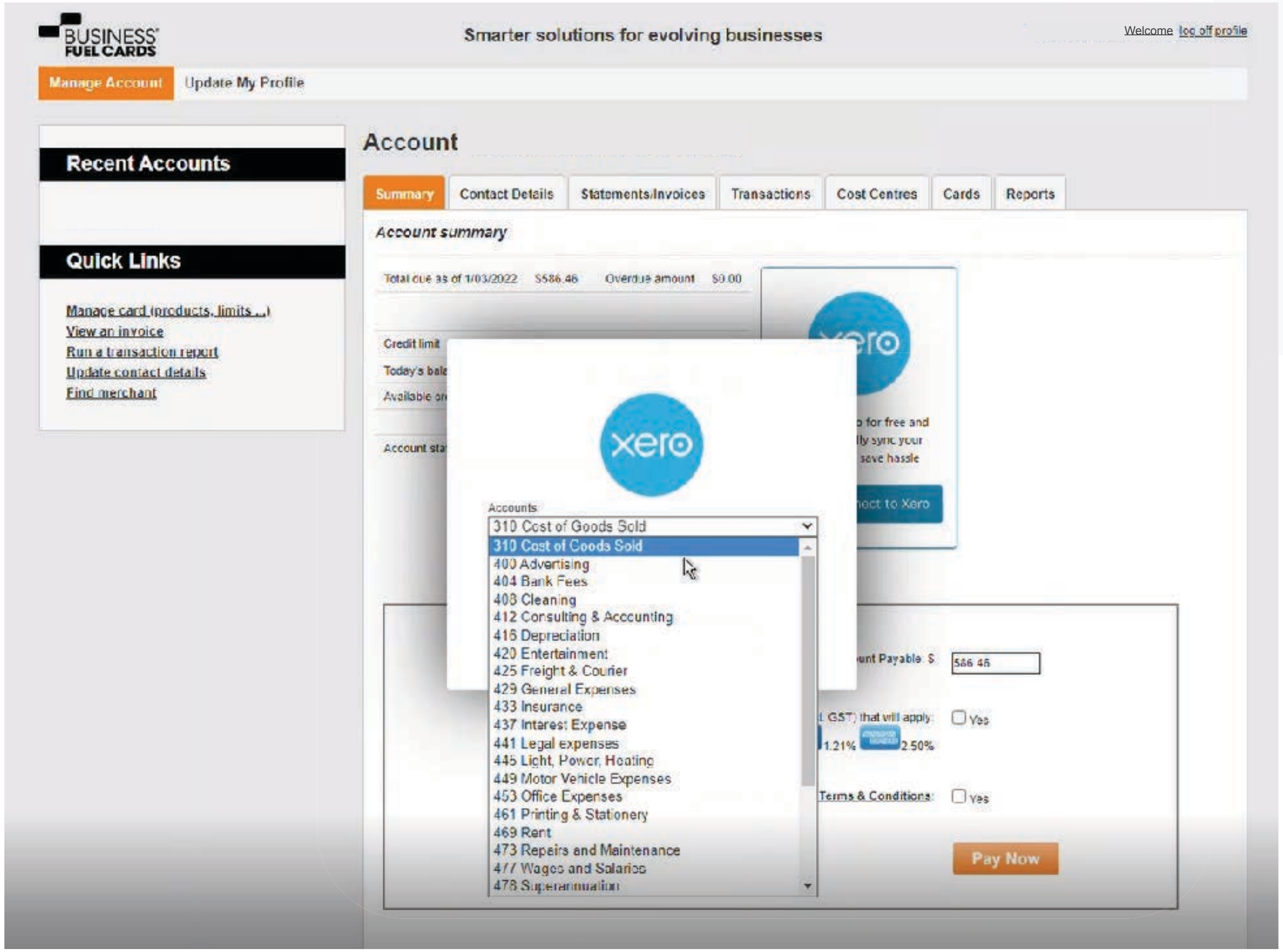


If prompted, select the organisation you want to link to FleetCard from the drop-down menu.

Click "Allow access" to the FleetCard 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 FleetCard invoices to sync to, and the applicable tax rate. You can always change this later if needed.

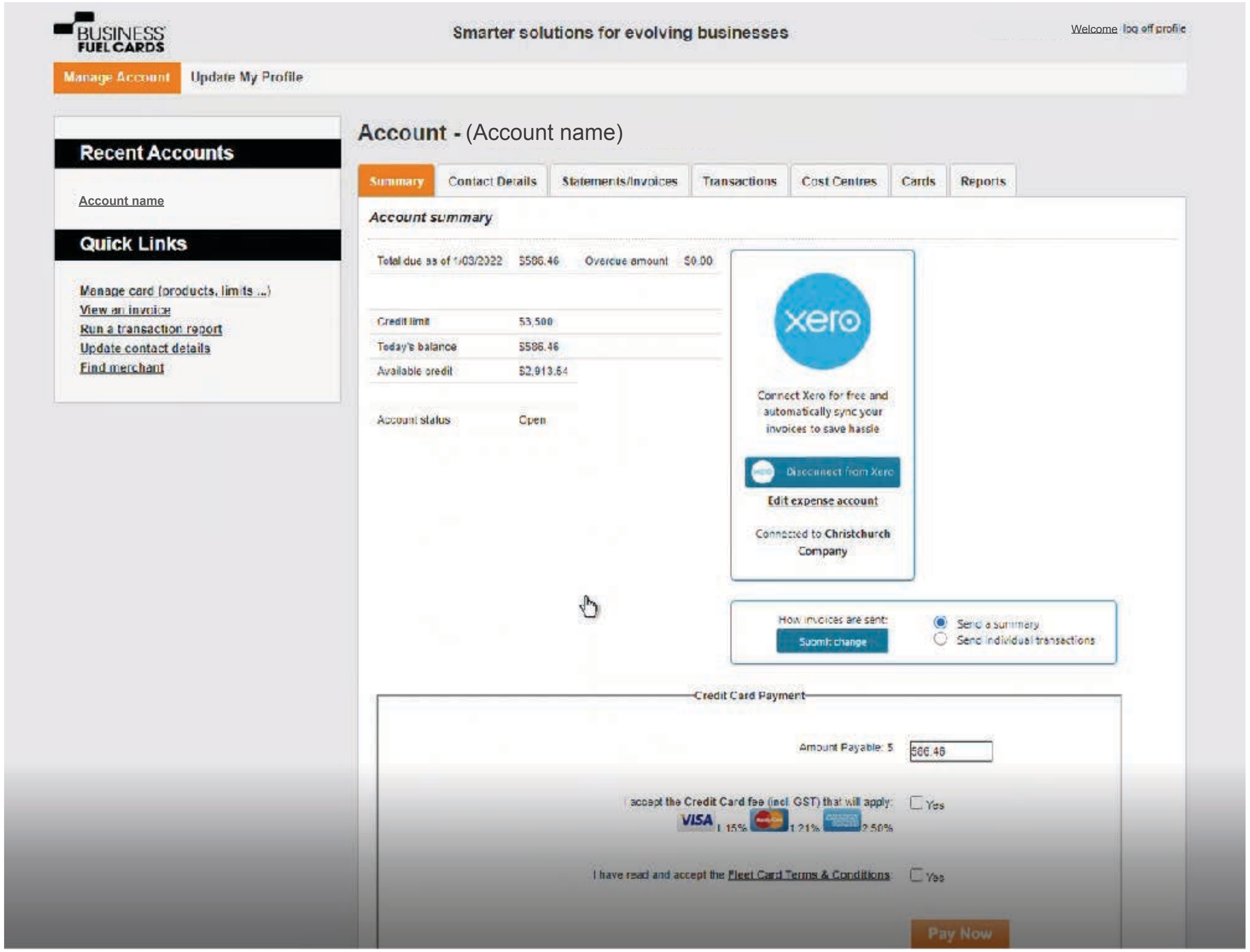


STEP 6. CHOOSE HOW YOU WANT INVOICES SYNCED

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".



THAT'S IT!

Your Xero + FleetCard integration is complete.

Your next FleetCard 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 FleetCard summary page and edit your expense account or how the invoices are sent. Here, you can also disconnect FleetCard 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.**