

FLEETCARD & XERO INTEGRATION: MAKING ACCOUNTING EASY



FleetCard ▶▶

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.

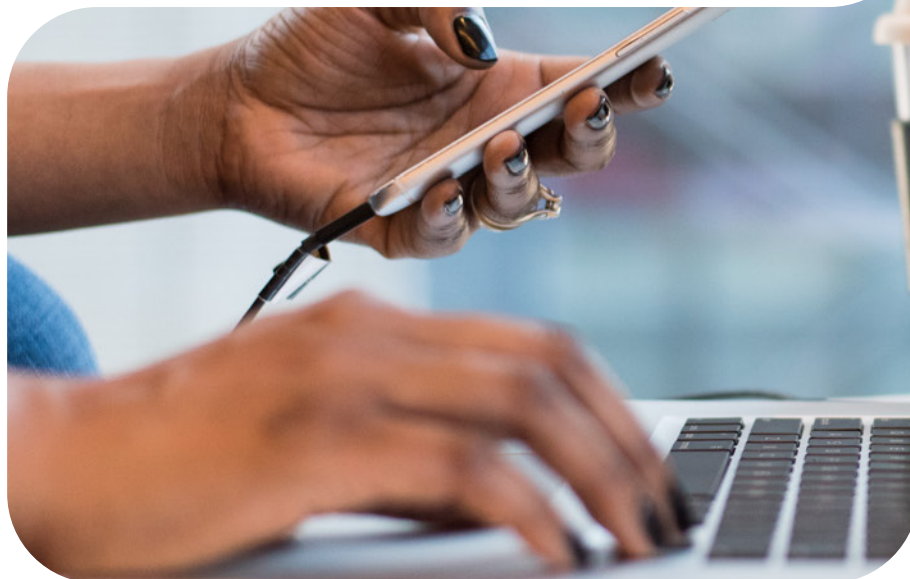
When your FleetCard and Xero accounts are connected, your FleetCard invoices feed directly into Xero, where you can see your transactions and keep your expense account up to date.

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.



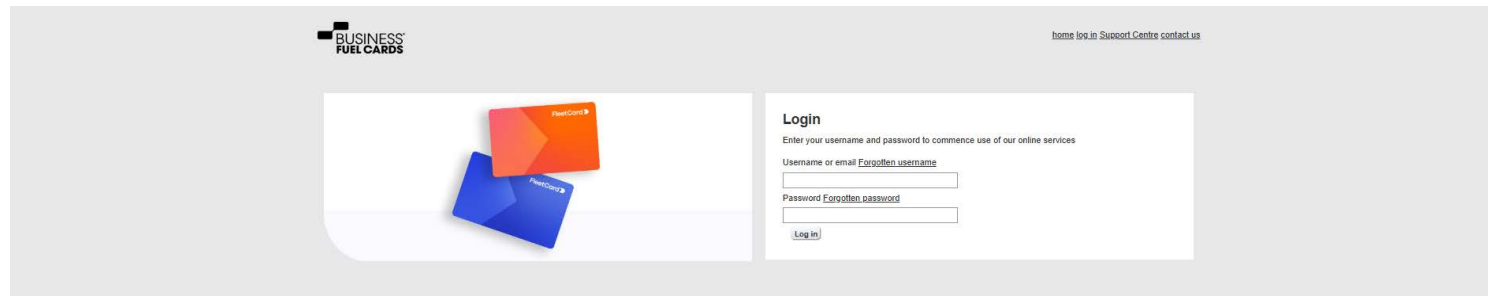
BEFORE YOU START

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.


The screenshot shows the 'Account summary' page of the FleetCard account. At the top, there's a navigation bar with tabs: 'Summary' (active), 'Contact Details', 'Statements/Invoices', 'Transactions', 'Cost Centres', 'Cards', and 'Reports'. Below the navigation bar, the 'Account summary' section displays a table with the following data:

Total due as of 1/03/2022	\$586.46	Overdue amount	\$0.00
Credit limit	\$3,500		
Today's balance	\$586.46		
Available credit	\$2,913.54		
Account status	Open		

A mouse cursor is pointing at the 'Credit limit' row. Overlaid on the right side of the page is a Xero connection modal. It features the Xero logo at the top, followed by the text 'Connect Xero for free and automatically sync your invoices to save hassle'. At the bottom of the modal is a button with the Xero logo and the text '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.




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 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.

The screenshot displays the 'Business Fuel Cards' account management interface. The main header includes the logo, the tagline 'Smarter solutions for evolving businesses', and a user welcome message. The left sidebar contains 'Recent Accounts' and 'Quick Links' sections. The main content area is titled 'Account' and features a tabbed interface with 'Summary', 'Contact Details', 'Statements/Invoices', 'Transactions', 'Cost Centres', 'Cards', and 'Reports'. The 'Summary' tab is active, showing an 'Account summary' section with a total due of \$586.46 and an overdraft amount of \$0.00. A 'Pay Now' button is visible. A pop-up window is overlaid on the screen, displaying a list of Xero expense accounts. The '310 Cost of Goods Sold' account is selected. The pop-up also includes a 'Terms & Conditions' checkbox and a 'Pay Now' button.

BUSINESS FUEL CARDS Smarter solutions for evolving businesses Welcome: [log off profile](#)

[Manage Account](#) [Update My Profile](#)

Recent Accounts

Quick Links

- [Manage card products, limits](#)
- [View an invoice](#)
- [Run a transaction report](#)
- [Update contact details](#)
- [Find merchant](#)

Account

[Summary](#) [Contact Details](#) [Statements/Invoices](#) [Transactions](#) [Cost Centres](#) [Cards](#) [Reports](#)

Account summary

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

Credit limit:
Today's balance:
Available on:
Account status:

Xero

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

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'. The main navigation bar includes 'Manage Account' and 'Update My Profile'. On the left sidebar, there are sections for 'Recent Accounts' and 'Quick Links'. The main content area is titled 'Account - (Account name)' and has tabs for 'Summary', 'Contact Details', 'Statements/Invoices', 'Transactions', 'Cost Centres', 'Cards', and 'Reports'. The 'Summary' tab is active, showing an 'Account summary' section with fields for 'Total due as of 1/03/2022', 'Credit limit', 'Today's balance', 'Available credit', and 'Account status'. To the right of this summary is a Xero integration panel with the Xero logo, a 'Connect Xero' button, and options to 'Disconnect from Xero' or 'Edit expense account'. Below this, there's a section for 'How invoices are sent' with two radio buttons: 'Send a summary' (selected) and 'Send individual transactions'. At the bottom, there's a 'Credit Card Payment' section with a 'Amount Payable' field, a checkbox to 'accept the Credit Card fee (incl GST) that will apply', and a checkbox to 'I have read and accept the Fleet Card Terms & Conditions'. A 'Pay Now' button is at the bottom right.

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**.