

CONNECTOR DATA – Xero (Practice)

The tables below detail the *standard* Connector field mappings for the above software. The Left column is the source system field name. The Right column is the Xeppo field it is mapped to. Custom mapping can be applied as required. Email support@xeppo.com.au if you need further guidance.

↔ = Two-way sync available

General Client Details	
Xero (Practice)	Xeppo
Contact ID	Client ID
First Name	First Name ↔
Last Name	Last Name ↔
Name	Name
Tax Number	TFN ¹
Email Address	Work Email
Work Fax	Work Fax
Work Mobile	Work Mobile
Work Phone	Work Phone

Contact Details	
Xero (Practice)	Xeppo
Contact	
Client ID	Client ID
Name	Contact Type
Key Firm Contact ID	Key Firm Contact ID
Option	Name
Addresses	
Client ID	Client ID
Temp Key	Temp Key
Address Type	Type ↔
Address Line 1	Line 1 ↔
Address Line 2	Line 2 ↔
Address Line 3	Line 3 ↔
Postal Code	Postcode ↔
Region	State ↔
City	Suburb ↔
Country	Country ↔

Account Details	
Xero (Practice)	Xeppo
Account ID	Account ID
Name	Account Name
Bank Account Number	Account Number
Type	Account Type
Class	Class
Client ID	Client ID
Code	Code
Tax Type	Tax Type

Fee & Invoice Details	
Xero (Practice)	Xeppo
Fee	
Source ID	Source ID
Name	Name
Client ID	Client ID
Account Code	Fee Category Source ID
Line Item Id	Fee ID
Line Amount	Fees
Invoice ID	Invoice ID
Invoice²	
Client ID	Client ID
Date	Date
Due Date	Due Date
Sub Total	Fees
Invoice ID	Invoice ID
Number	Invoice No
Amount Due	Outstanding
Internal Type	Transaction Type
Amount Credited	Writeoff

¹ Xeppo is not registered to store Tax File Numbers (TFN). The system will recognise the last 3 digits of an individual's TFN from the source data and this is used in the points-based search and match when linking client data.

² Invoices will only be imported into Xeppo if they have a status of 'Authorised' or 'Paid', and the type is 'Sales Invoice'. Bills are not imported into Xeppo.