

# CONNECTOR DATA – Xero Practice Manager

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 Xero field it is mapped to. Custom mapping can be applied as required Email [support@xeppo.com.au](mailto:support@xeppo.com.au) if you need further guidance.

↔ = Two-way sync available

General Client Details	
Xero Practice Manager	Xeppo
Client UUID	ClientID
Group UUID	GroupID
Group Name	N/A <sup>1</sup>
Client Code	Code
Client Referral Source	Client Referred By
Client Business Structure	Entity Type ↔
Client Name	Name
Client Title	Title
Client First Name	First Name ↔
Client Other Name	Middle Name ↔
Client Last Name	Last Name ↔
Client Gender	Gender ↔
Client Date Of Birth	Date Of Birth ↔
Client Business Number	ABN ↔
Client Company Number	ACN ↔

Contact Details	
Xero Practice Manager	Xeppo
<b>Contact</b>	
Contact Detail ID	Contact Detail ID
Contact Type	Contact Type
Value	Contact Value
Contact Name	Mail Name
<b>Email, Fax &amp; Phone Numbers</b>	
Client Email	Work Email ↔
Client Fax	Work Fax ↔
Client Phone	Work Phone ↔
<b>Addresses</b>	
Type	Type ↔
Line 1	Line 1 ↔
Postcode	Postcode ↔
State	State ↔
Suburb	Suburb ↔
Country	Country ↔

Key Firm Contacts	
Xero Practice Manager	Xeppo
Job Manager	Job Manager
Account Manager	Account Manager

Relationships	
Xero Practice Manager	Xeppo
Client UUID	From ClientID
Related Client UUID	To ClientID
Relationship Type	Relationship TypeFrom
Created Date	Created Date

Fee & Invoice Details	
Xero Practice Manager	Xeppo
<b>Fee</b>	
Category Name	Source ID
Category Name	Name
Client UUID	ClientID
Fee Category Source ID	Fee Category Source ID
Fee ID	Fee ID
Fees	Fees
Invoice ID	Invoice ID
Invoice No	Invoice No
Val	Val
WriteOff	Writeoff
Time Entry Invoice ID	Time Entry Invoice ID
<b>Invoice</b>	
Client UUID	Client ID
Invoice Date	Date
Invoice Due Date	Due Date
Invoice Amount	Fees
Invoice UUID	Invoice ID
Invoice ID	Invoice No
Invoice Amount Outstanding	Outstanding
Invoice Amount Paid	Receipt Amount

Xero Practice Manager	Xeppo
<b>Invoice cont.</b>	
Invoice Type	Transaction Type
Invoice Amount	Val

### Aged Debtors

Xero Practice Manager	Xeppo
Invoice UUID	Aged Debtors ID
Invoice Amount Outstanding	Amount Outstanding
Client UUID	Client ID
Invoice Amount Including Tax	Gross
Invoice Amount Tax	GST
Invoice Date	Invoice Date
Invoice ID	Invoice No
Invoice Type	Item Type
Invoice Amount	Net

### Quote Details

Xero Practice Manager	Xeppo
Client UUID	Client ID
Quote ID	Quote ID
Quote Date	Issued Date
Quote State	Status
Quote Amount	Amount
Quote Amount Including Tax	Amount Including Tax
Quote Amount Tax	Amount Tax
Quote Description	Description
Quote Valid Date	Valid To Date

### Activities > Time (2-way API\*)

Xero Practice Manager	Xeppo
<b>Billable Jobs</b>	
Client UUID	Client ID
Job UUID	Billable Job ID
Job ID	Job Number
Job Name	Job Name
Job Description	Job Description
Budget	Budget
Job State	State
Job Partner	Partner
Job Manager	Manager
Job Start Date	Start
Job Due Date	Due
Job Completed Date	Completed Date
<b>Billable Tasks</b>	
Task UUID	Billable Task ID
Job UUID	Billable Job ID
Task Name	Task Name
Task Description	Task Description

Task Estimated Minutes	Estimated Duration (Sec)
Task Actual Minutes	Actual Duration (Sec)
	Label
Task Billable	Is Billable
Task Start Date	Start
Task Due Date	Due
Task Completed	Is Completed

Xero Practice Manager	Xeppo
<b>Time Entries</b>	
Job Client UUID	Client ID
Task to Billable Job ID	Billable Job ID
Task UUID	Billable Task ID
User ID	User ID
UserFirstName, UserLastName	User Name
Time Date	Time Entry Date
Task Minutes	Duration (sec)
Task Billable	Is Billable
Task Note	Notes
Task Invoice Task UUID	Invoice ID

#### ADDITIONAL INFORMATION:

##### <sup>1</sup> Grouping - Head Client details:

XPM does not provide the Head Entity of the group in their API information. Xeppo looks to the Group Name and attempts to identify the head of the group from this text, comparing it to the names of entities in the group. If a match is found then that entity is marked as the Head Client for the group.

The 4 explicit valid naming structures are:

- <Name>
- <Name> Group
- <FirstName> <LastName> Group
- <LastName> - <FirstInitial>

***If you are constructing your Group Names in a format different to the above, please discuss this with our team.***

#### TFN:

At this time, TFN is not available for Xeppo to retrieve via the API.

\* XPM 2 way API is an additional service that is configured separately. Email [support@xeppo.com.au](mailto:support@xeppo.com.au) if you wish to have it enabled for your practice.