TaxFitness

XERO INTEGRATION WITH TAXFITNESS
USER MANUAL

Learn how to connect your TaxFitness subscription with Xero and import client data.

Contents

Requirements

1. Must have a valid Xero account.
2. Must have a valid Xero Practice Manager (XPM) account with an active subscription.
3. All users (your staff) require XPM General privileges (In XPM, go to General settings > Staff > General privileges) as below:

General Privileges

Privilege	Full ☐	View	New	Edit	Delete	Print
Client		☑	☐	☐	☐	

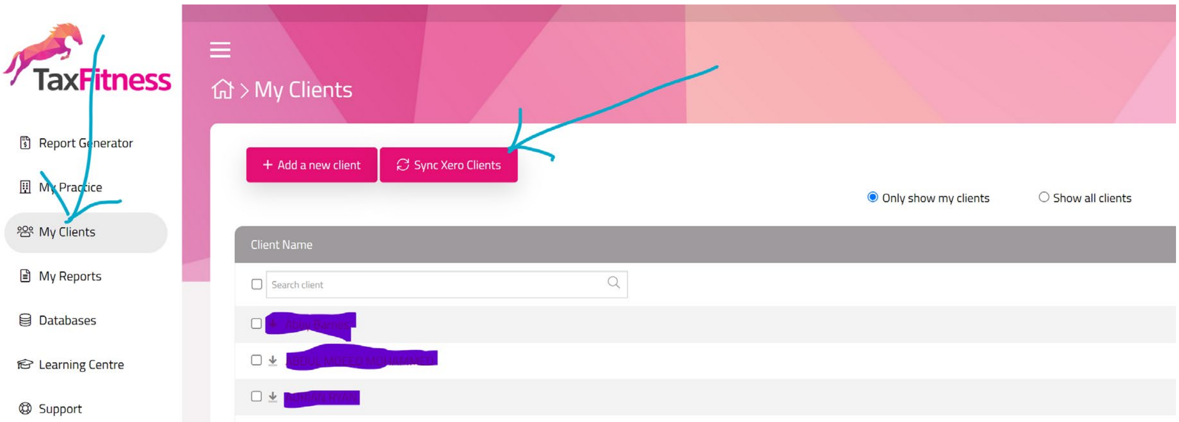
4. All users require XPM API access privileges (In XPM, go to general settings > Staff > API access privileges) as below:

API Access Privileges

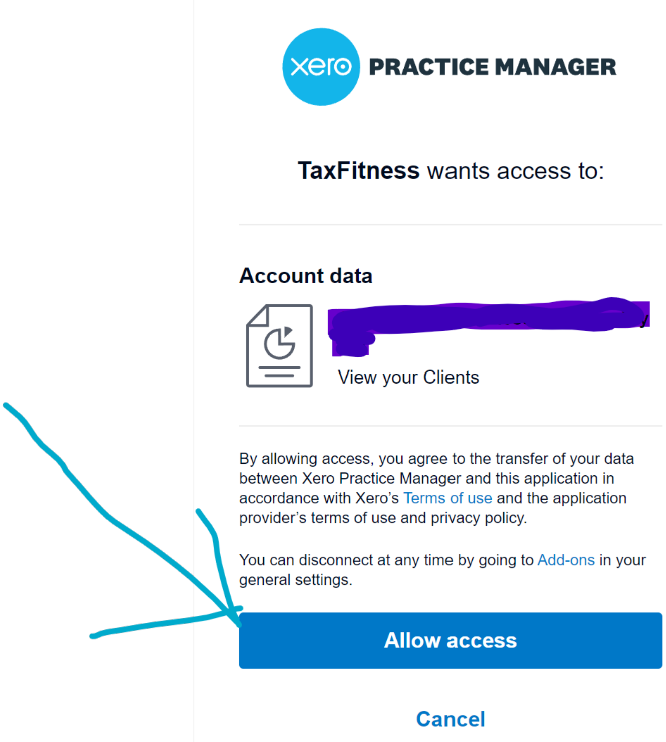
Privilege	Full ☐	View	New	Edit	Delete	Print
Authorise 3rd Party Full Access	☑					

Sync with Xero as an existing TaxFitness subscriber

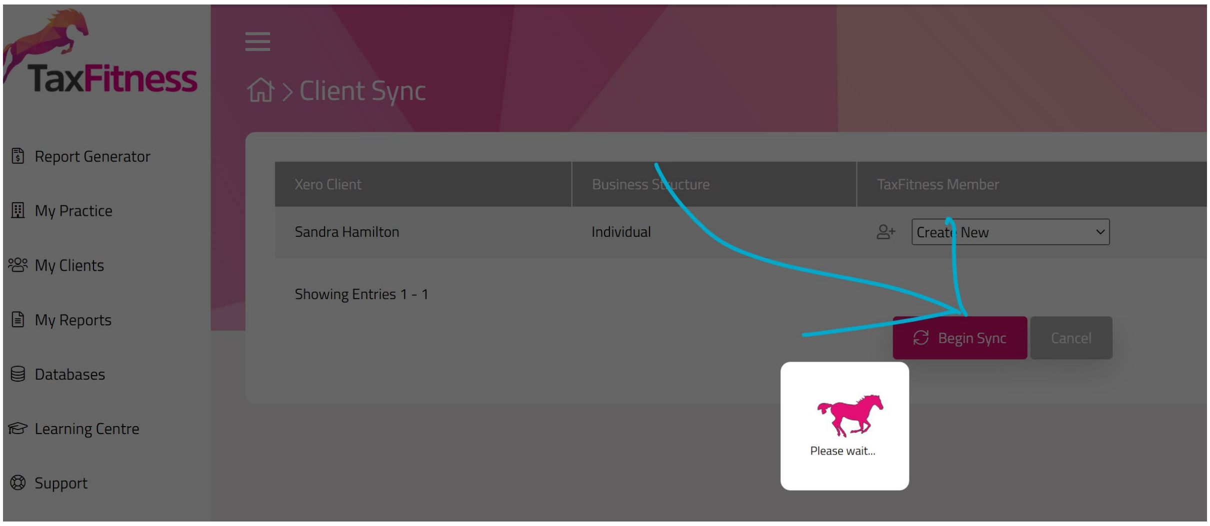
1. Login to your TaxFitness account,
2. Navigate to My Clients,
3. Select ‘Sync Xero Clients’,



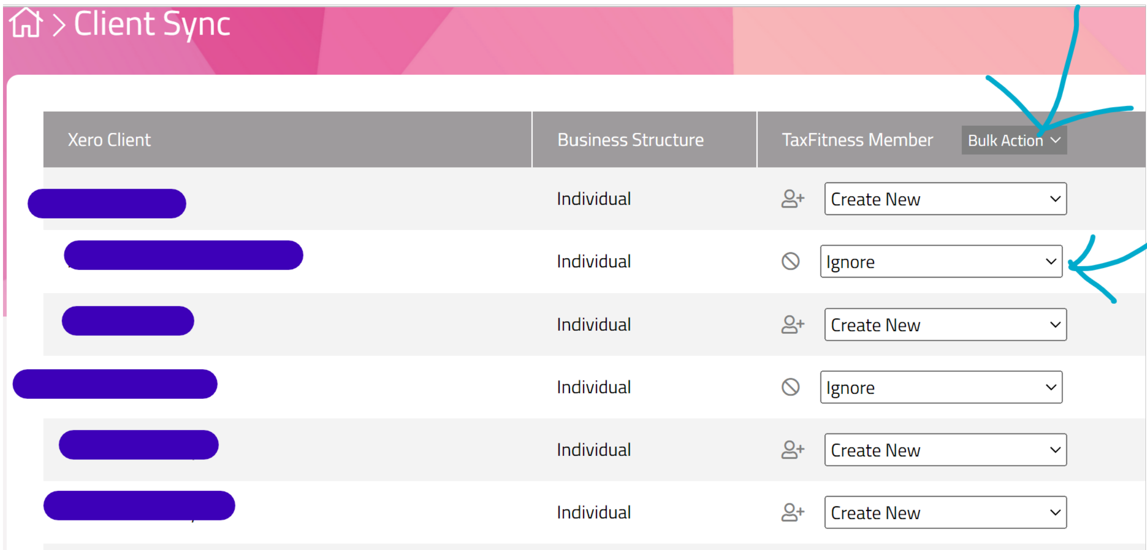
4. Select Allow access,



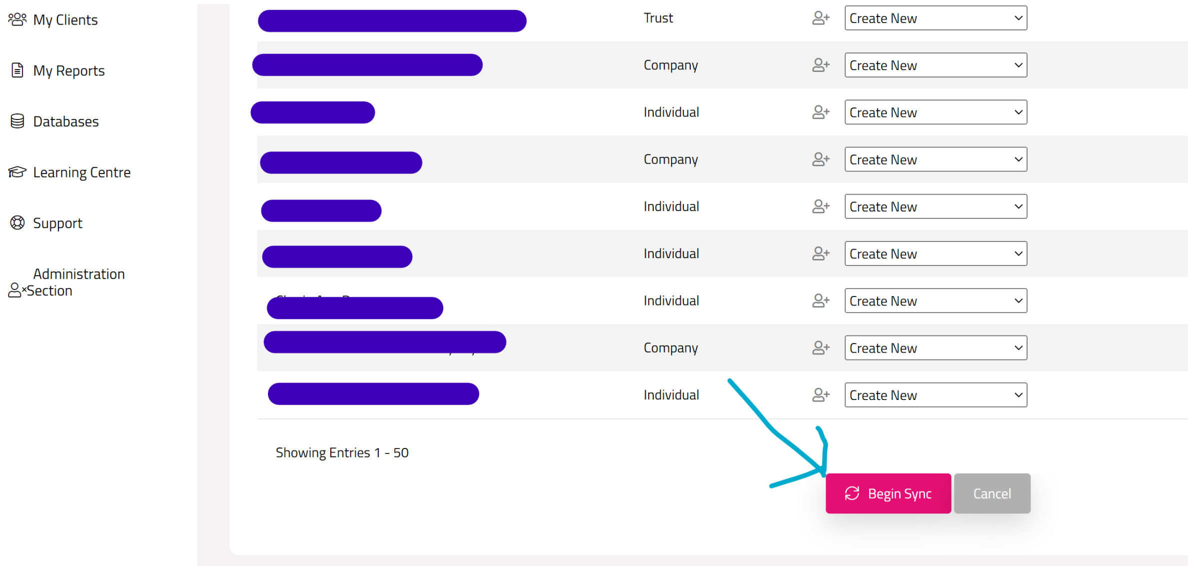
5. Go back to TaxFitness and select 'Begin Sync',



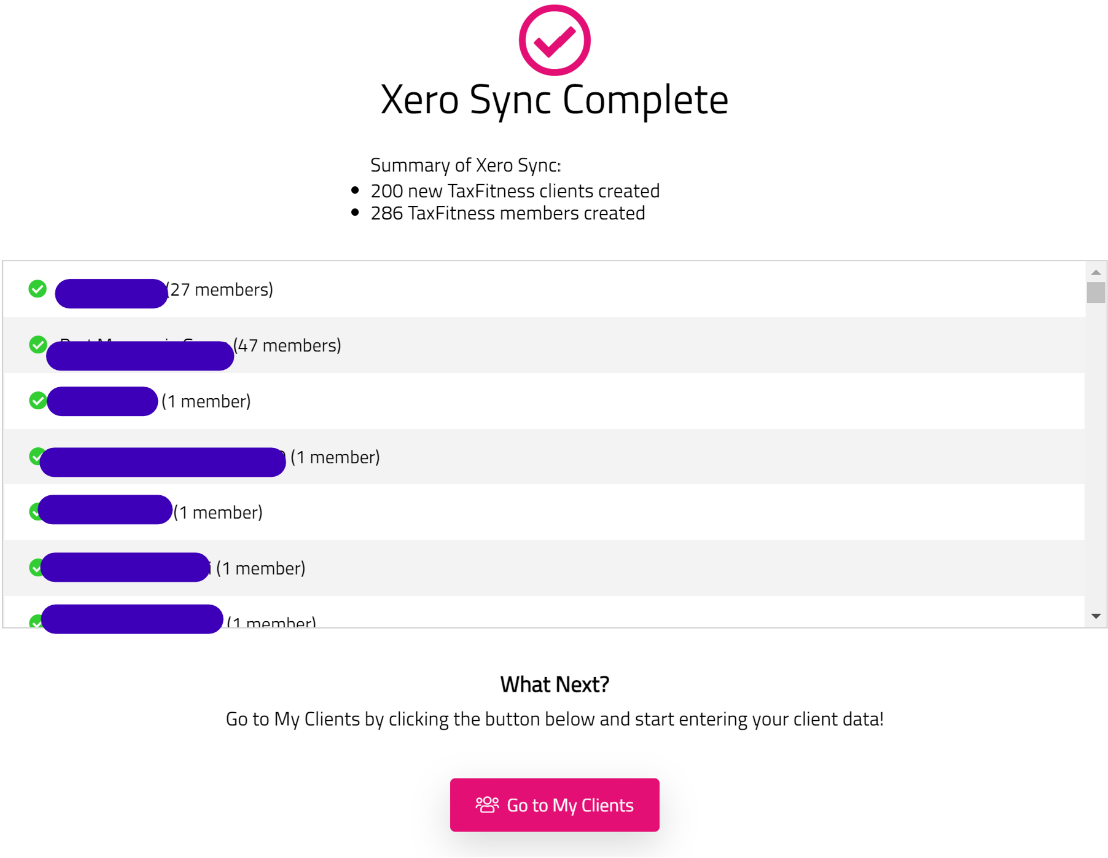
6. You can go through the list and choose which clients to ‘Ignore’ and which to import by leaving as ‘Create New’, otherwise just select ‘Create all’ from the top right **‘Bulk Action’ drop-down menu** and all clients will be imported,



7. Select ‘Begin Sync’,

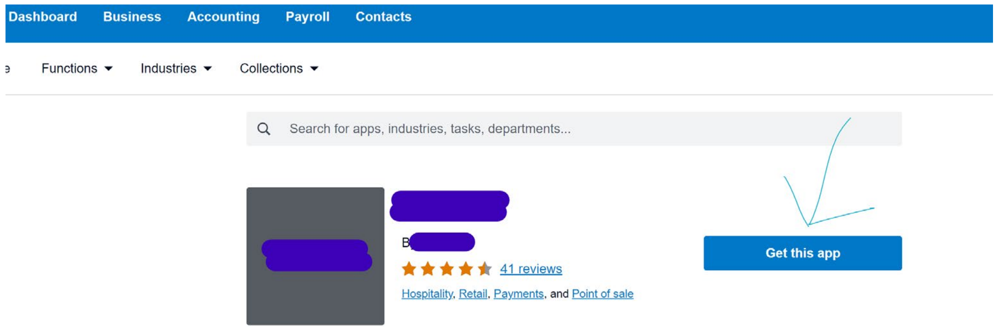


8. Congratulations! Your Xero clients are now synced with TaxFitness.

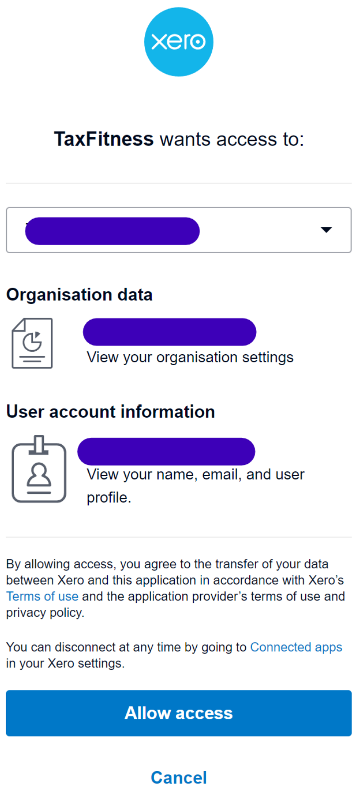


Connect to TaxFitness from Xero as a new subscriber

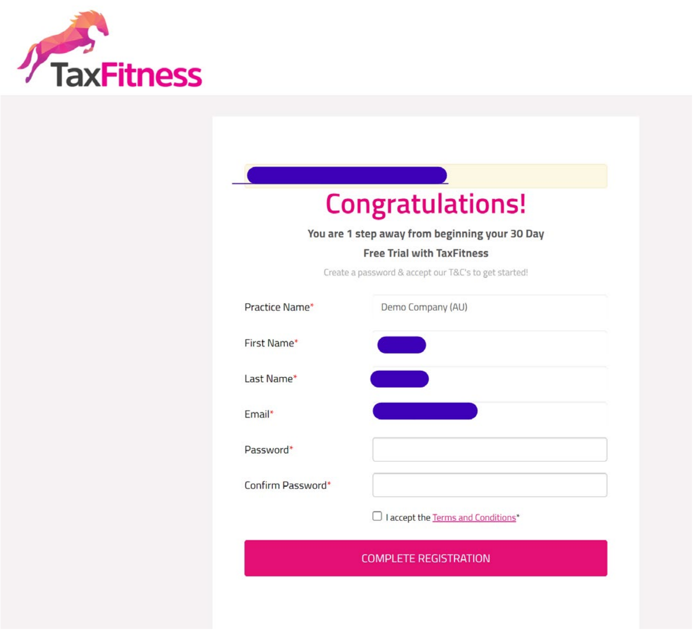
1. Go to the [Xero App Store]() and search for TaxFitness,
2. Select 'Get this App',



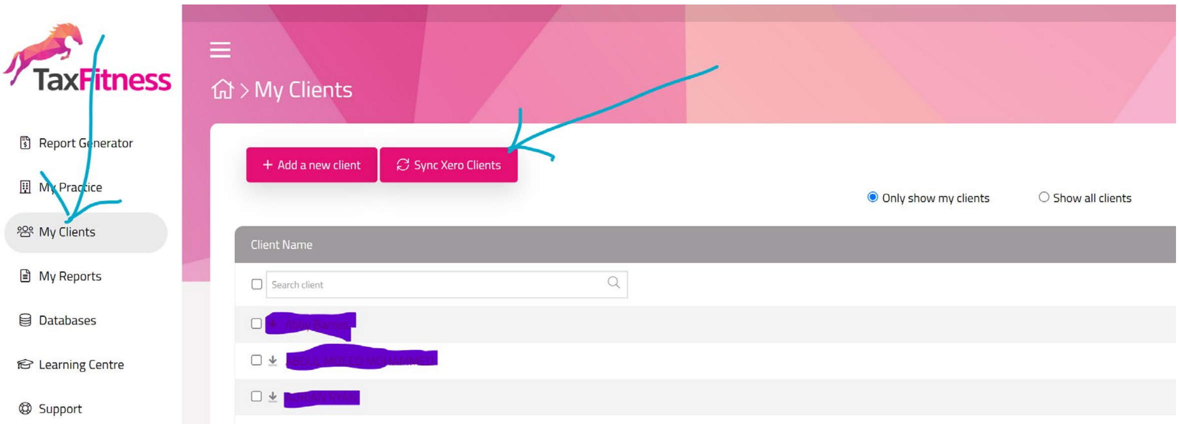
3. Select your practice and choose ‘Allow access’.



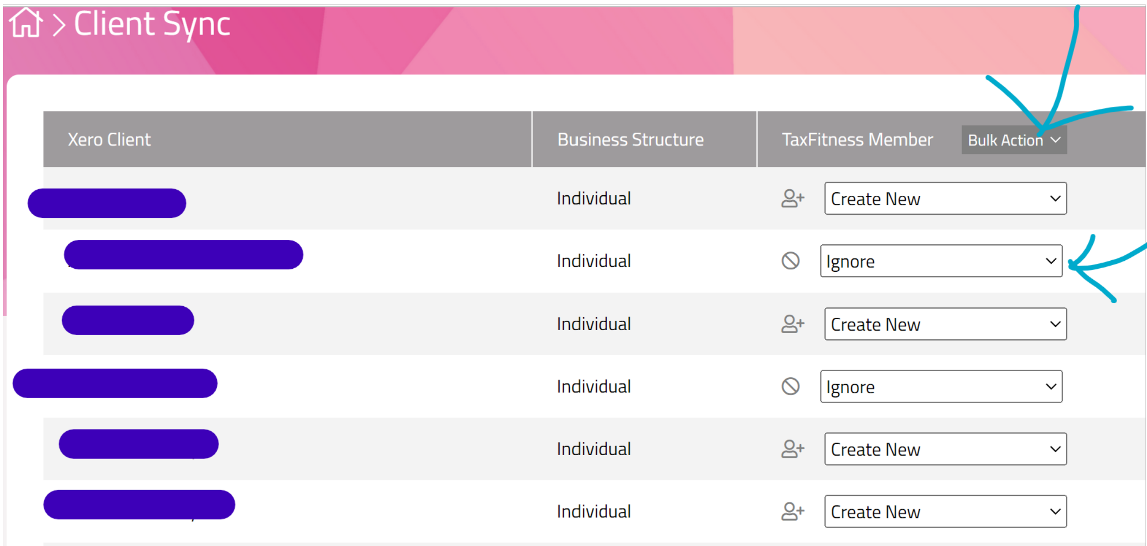
4. Sign up for a 30-day free trial with TaxFitness



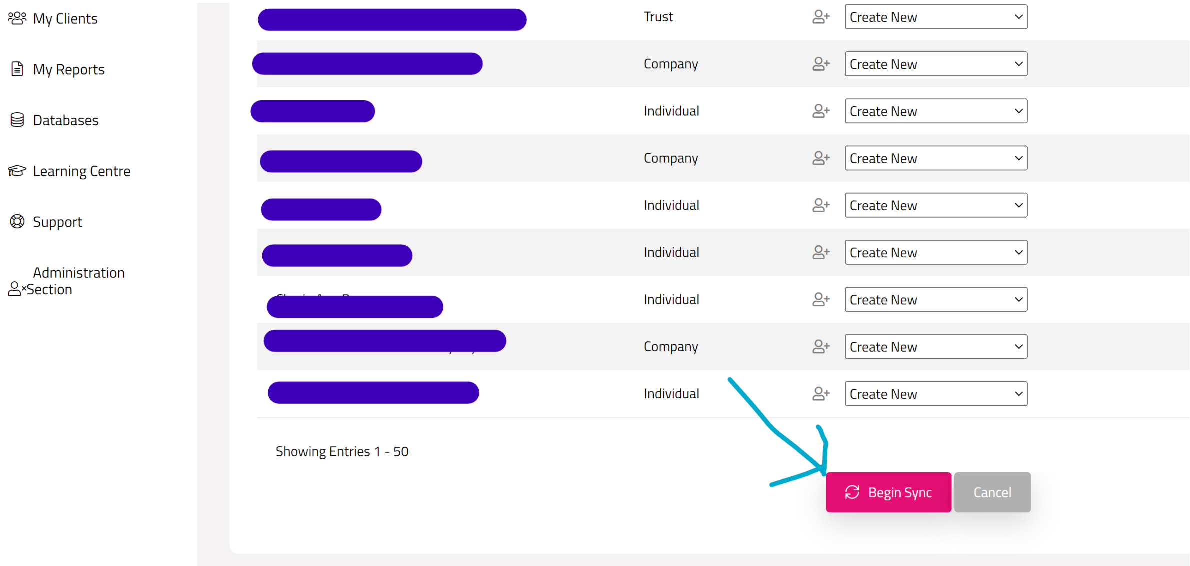
5. Select ‘Sync Xero Cleints’



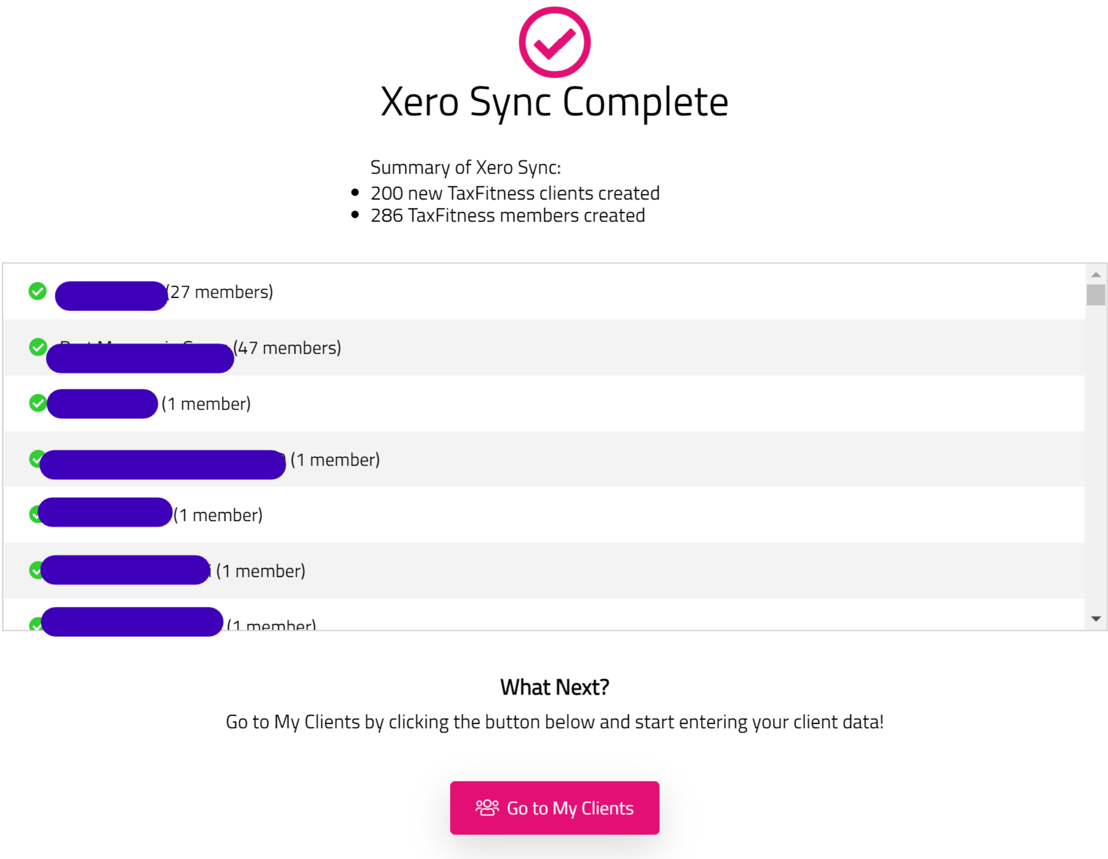
6. You can go through the list and choose which clients to ‘Ignore’ and which to import by leaving as ‘Create New’, otherwise just select ‘Create all’ from the top right **‘Bulk Action’ drop-down menu** and all clients will be imported.



7. Select ‘Begin Sync’



8. Congratulations! Your Xero clients are now synced with TaxFitness.



Integration Considerations

Signing up to TaxFitness from the Xero app store

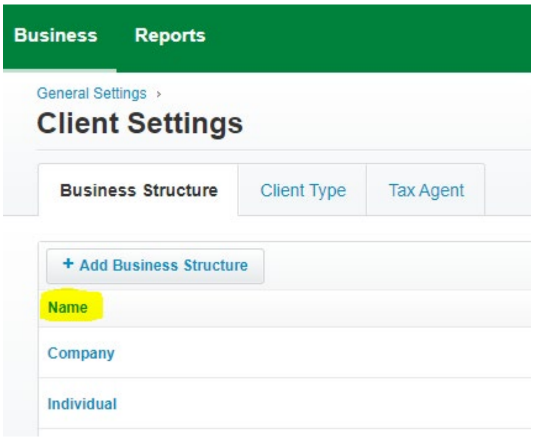
Your practice name from Xero is captured and prefilled as a practice name in the TaxFitness registration screen.

Xero tenants

Users can connect/disconnect TaxFitness with their XPM tenant.

Xero sync requirements, restrictions & conversions

- Only Practice Managers are allowed to sync clients. Accountants will not be able to sync clients,
- Only active or prospective clients will be imported. Archived clients will be ignored,
- Business Structures (**Name** - as highlighted in the screenshot) that will be imported,



  - Company
  - Individual
  - Partnership
  - Self Managed Superannuation Fund
  - Trust.

Xero	**TaxFitness (TF)**
Groups	Groups in **Xero** are equivalent to clients in TF
Clients	If a client is **part of a group** in **Xero** then the name of the group will be the client name in TF and the client name in **Xero** will the name of the member in TF. If a client is **not part** of any Groups in **Xero,** then the name of the Client as well as the name of a member in TF with be the **Xero** Client name.
Relationships	Only the Xero relationship types of "**Partner**" of the Partnership & "**Beneficiary**" of the Trust type are synced. Any other relationship for types will be ignored.

- Archived clients will **not** be deleted in TF during the sync,
- A client removed from a Group in XPM will remain as a member of the client in TF. Additionally, it will be added as its own client in TF.
- **Archived clients in XPM**
    - If a client is archived after the initial sync, the client remains in TF. Users will need to delete it in TF manually.
- **Deleting a synced member/client in TF**
    - A client or member needs to be archived in XPM, otherwise, it will be shown as a client in the next sync.
- **Removing relationship in XPM**
    - This must be repeated in TF.
- **Removing relationship in TF**
    - This must be repeated in Xero, otherwise, the next sync will establish the relationship again. This process runs in the background.

- **Bulk action**

  If there are more than 5 Xero clients to be synced, the bulk option will be visible in the "header".

  - Options are:
    - Ignore all,
    - Create all.
  - **Please note:** The selection will be saved i.e if you select Ignore All, any subsequent syncs will show "Ignore all" for each client.
- **Subsequent sync**
  - Name and Email changes in XPM will be automatically updated in TF.
  - Partners/ Beneficiaries of the Partnership/Trust group member will be imported and added under the same client automatically. However, Users will be redirected to the confirmation screen to choose whether to create a new individual client or ignore it.
  - Change of business structure for an existing client in XPM.
    - If the new business structure is valid, the existing client and their financial data will be deleted from TF,
    - The client will be recreated in TF with the new business structure without financial data.
- **Syncing with existing TF Clients**
  - The sync screen dropdown box will list existing TF clients that are not in sync with Xero.
    - If the name or email matches with the existing (non-synced) member then the matching member will be the first option in the dropdown list, and all other members(non-synced) with the same business structure will be listed below the "Create" and "Ignore" options.

- Partnerships/Trusts
    - If a client and member exist in TF, the partnership and partners will be synched with the existing members/partners. Existing financials will be kept. **Please note:** The beneficiaries' **distribution%** for trusts and Partner **share%** for partnerships need to be set up manually after the sync,

    - If a partner exists as an individual in TF and is not set up in a partnership in TF but is a partner of a Xero Partnership, the partnership will be set up in TF. Any new partners will be added from Xero and the existing client will be added as a member to the new partnership. New members (Xero) will be added as **individual** clients in TF.