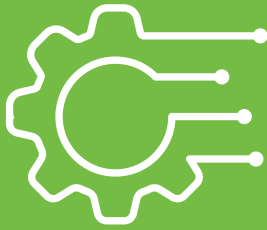


SET UP



OVERVIEW

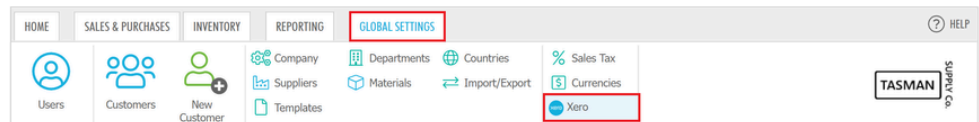
STEPS

Set up Xero

Tidy's integration with Xero accounting means that when you make **sales, purchases, and adjustments** to your stock in Tidy, your Xero financial records are automatically updated. In this module, learn how to set up the **connection to Xero** from your Tidy account.

Head to **Xero** under **Global Settings**.

Click on **Connect to Xero**.



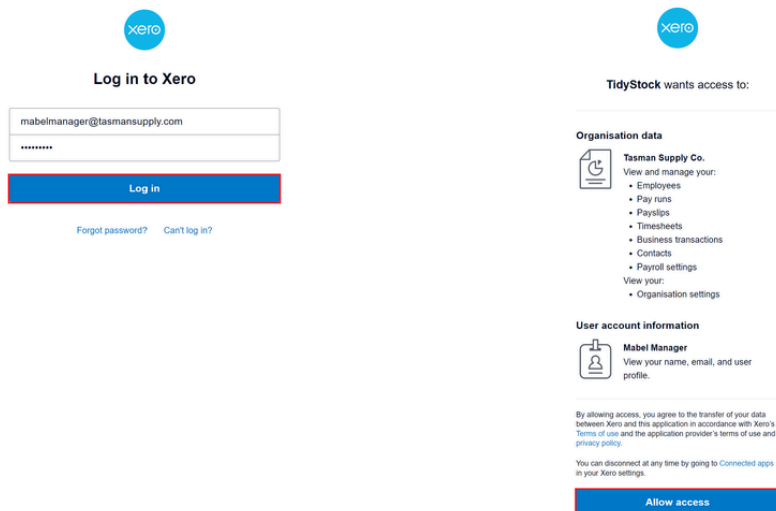
XERO SETUP

This Tidy account is not connected to Xero. Please connect to Xero, then you will be able to configure Xero setup in Tidy.



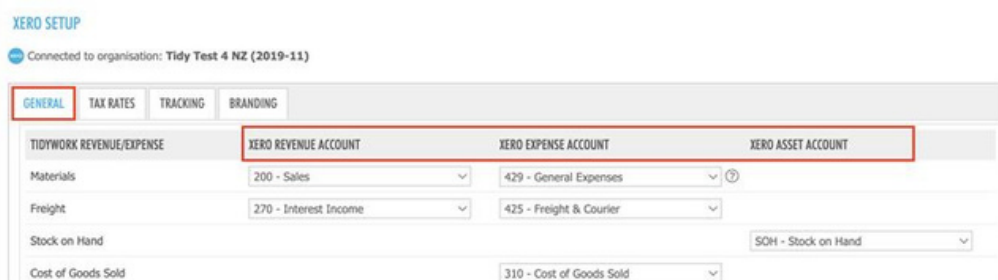
This will take you to the **Xero Login page**. Log in using your Xero details here. If you do not have a Xero account, sign up for a free trial to continue.

Click **Allow Access**, and you'll be signed in and returned to **Tidy**.



As seen here, there are **four tabs** that appear.

Under **General**, you can select the Xero **revenue, expense, and asset** accounts that you want to connect Tidy to.





SET UP XERO



Beneath this, you can enable **Auto-Approval** of supplier invoices, sale invoices, credit, and stock adjustments. This means they will appear in Xero as **automatically approved** rather than as **drafts**.

AUTO-APPROVAL

- ☒ Enable auto-approval of purchase order (payable) invoice exports
- ☒ Enable auto-approval of sale invoice / sale credit note exports
- ☒ Enable auto-approval of sale / sale credit journal exports
- ☒ Enable auto-approval of stock adjustment journal exports

Under the **Tax Rates** tab, select the **revenue** and **expense** tax rates that will be applied when you make sales and purchases.

GENERAL	TAX RATES	TRACKING	BRANDING
TIDYSTOCK TAX RATE		XERO REVENUE TAX RATE	
AGST - AUS Goods & Services Tax		15% GST on Income	
GST - NZ Goods & Services Tax		15% GST on Income	
VAT - UK Value Added Tax		- Select -	
		XERO EXPENSE TAX RATE	
		15% GST on Expenses	
		15% GST on Expenses	
		- Select -	

The **Tracking** tab will appear with categories like region and customer type if you have set up tracking in your Xero account.

GENERAL	TAX RATES	TRACKING	BRANDING
TRACKING CATEGORY 1		TRACKING CATEGORY 2	
Name	Region	Name	Customer Type
Options	Australia New Zealand United Kingdom	Options	
☐ Require selection on all Sales and Purchase Orders		☐ Require selection on all Sales and Purchase Orders	
Update Tracking Categories			

Lastly, the **Branding** tab is home to **Invoice Templates**, which Xero refers to as **Branding Themes**.

These will only appear here after they are set up in Xero.

GENERAL	TAX RATES	TRACKING	BRANDING
• Standard Invoice			
Update Branding Themes			
Refresh Xero Data Disconnect			