

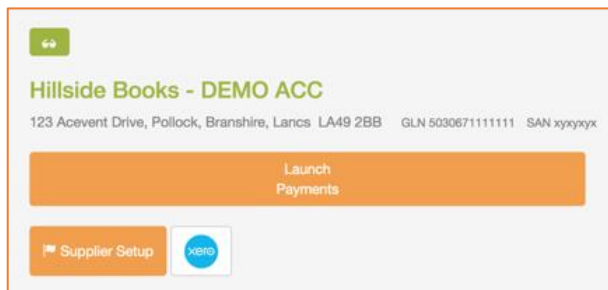


## Linking Xero to Batch Payments

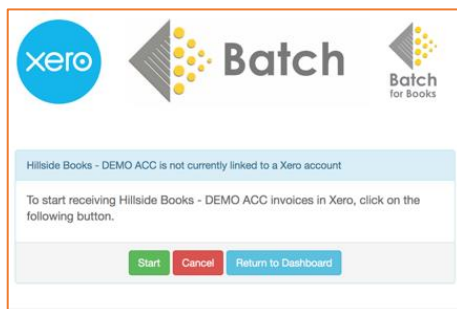
The average bookseller is manually entering something in excess of 200 invoices each month, a task that takes them away from the shop floor and their customers. Manually entering data can also lead to errors being introduced, which take time to sort out later. Linking Batch Payments to Xero will give you more time to focus on the important business of selling books!

**Note: Email [mail@batch.co.uk](mailto:mail@batch.co.uk) to tell us that you would like to try Xero, and we'll add the Xero button to your BatchOne dashboard.**

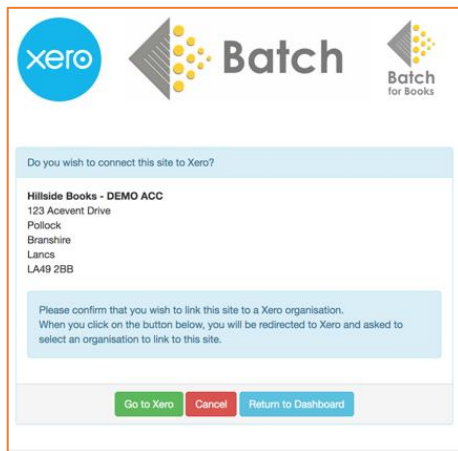
1 Log on to your BatchOne account. Click on the **Xero** button next to Supplier Setup. In this example, the bookseller is Hillside Books UK.



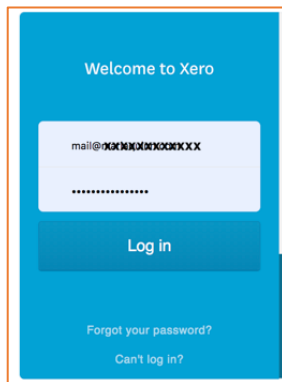
2 You will be taken to the following screen. Click on **Start** to begin connecting Batch to your Xero account.



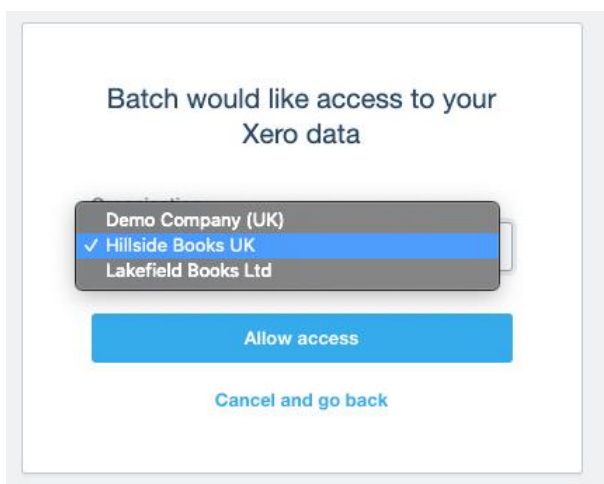
3 On the next screen, select **Go to Xero**.



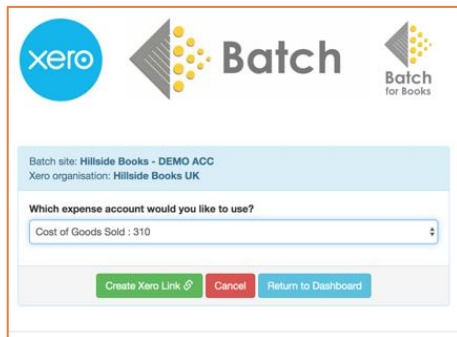
4 You will then be taken to Xero where you'll be asked to log in with your usual user name and password.



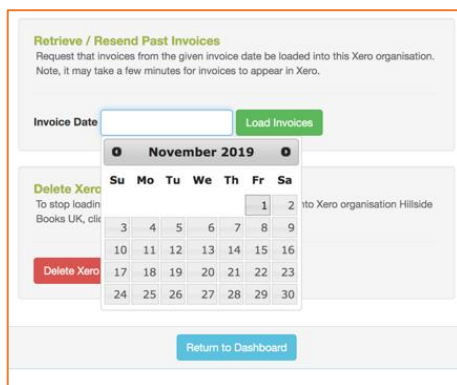
5 Select your Xero account name (here Hillside Books UK) from the drop-down menu and **Allow access**.



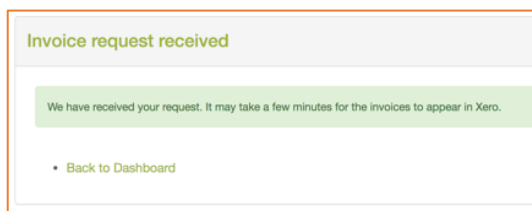
6 On BatchOne, select the expense account you want to link to, then click on **Create Xero Link**.



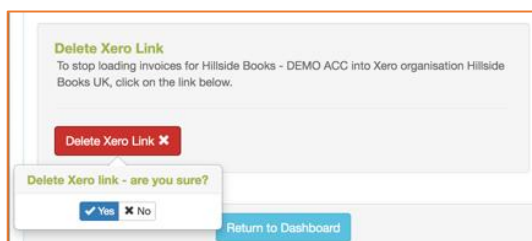
7 Select a date from a drop-down calendar. The first date shown will be the present, but you can choose a date in the past. Click on **Load Invoices**.



8 This following message will appear in BatchOne. The link is now active and all new invoices and credits received by Batch will be sent to your Xero account.



9 To stop loading your invoices, click on **Delete Xero Link**. This gives you the option to log on and complete the process at a later date.



10 This is the view of invoice 0666670786 in your **Batch Payments** account.

Current authorisation period closes 28th March for payment 31st March

Show Transactions For Hillside Books - DEMO ACC  
Nationwide Distributors - DEMO ACC Only

Filter transactions by branch: Hillside Books - DEMO ACC

Filter transactions by status: All

Showing transactions due up to 31-Mar-2021. Page 1

Actions	Trans Date	Type	View PDF	Invoice No	CN, Claim or Inv Ref#	Due Date	Status	Claim View	Date Authorised	Currency	Value	Outstanding	
<b>Nationwide Distributors - DEMO ACC</b>													
Authorised by 28-Mar-2021						0.00	0.00						
Ready For Payment						0.00	0.00						
<input type="checkbox"/>	01-Jan-2021	Inv		0666670786		15-Jan-2021	Cleared			GBP	38.23	38.23	
<b>Set All</b>													
<b>Grand Totals For All Suppliers for period ending 31-Mar-2021</b>													
											Open Transactions	537.31	537.31
											Modified Transactions	0.00	0.00

C = Cancel (No Action)

This is the view of the same invoice in your **Xero** account.

0666670786	Nationwide Distributors - DEMO ACC (5011111111111)	1 Jan 2021	15 Jan 2021	38.23
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This is the same invoice paid in your **Xero** account.

0666670786	Nationwide Distributors - DEMO ACC (5011111111111)	1 Jan 2021	15 Jan 2021	38.23	0.00	Paid
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And the actual invoice after it has been paid.

Purchases overview > Bills to pay >

**Bill 0333330786**

Paid Print PDF Bill Options

From	Date	Due Date	Reference	Total
Nationwide Distributors - DEMO ACC (5011111111111)	1 Jan 2021	15 Jan 2021	0333330786	38.23

No address  
Add address

Amounts are Tax Exclusive

Item Code	Description	Quantity	Unit Price	Account	Tax Rate	Amount GBP
	Goods at 0% VAT	1.00	38.23	Cost of Goods Sold	Zero Rated Expenses	38.23
Subtotal						38.23
Total Zero Rated						0.00
<b>TOTAL</b>						<b>38.23</b>
Less Payment 1 Jan 2021						38.23
<b>AMOUNT DUE</b>						<b>0.00</b>

If you have queries or need assistance, contact us at [mail@batch.co.uk](mailto:mail@batch.co.uk).