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Register Quick Setup Guide

Configuring Xero Integration

July 2022



register

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Xero Integration Overview

This quick start guide will walk you through how to setup your Register account and configure the Xero accounting integration.



Once configured Register will submit sales totals by each tax rate and by each tender type automatically to your Xero account (i.e. 5% tax on cash sales, 20% tax on cash sales, 5% tax on card sales and 20% tax on card sales), this process will automatically run just after midnight for the previous days trading and any previous unsubmitted transactions (for the odd occasion where you might have had offline transactions). For example, Tuesdays sales between 9am – 6pm will be submitted on Wednesday between 00:00 – 01:00.

Each days Register sales will be pushed to Xero as Paid Invoices with Register refunds pushed as separate Paid Credit Notes (also under the Invoices section of Xero).

Before connecting your Register and Xero accounts, you will first want to ensure you have all your stores, tender types and tax rates configured in Register as this data is 'mapped' to your accounts within Xero. You may also wish to speak with your accountant / bookkeeper prior to setting up the integration.

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Xero Integration Setup

It is quick and easy to connect Register to Xero following the steps outlined below:

1. Login to the Web Portal and click 'Config' then 'Integrations'

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Portal Admin: Tony Smith	Cash Denominations Discounts	c	
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	Taxes		Other Transactions : 0
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2. Click 'Connect to Xero'

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3. A new page will open, please login to your Xero account when prompted



4. Click 'Continue gaining access' within Xero and click the 'This login was me' button in the email from Xero



5. Click 'Allow access' in Xero, the screen will then refresh and return you to the Web Portal where you need to 'map' Register elements to Xero

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	n	an loss from here here		
	Xero Setup			
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	Standard Rate (20%)	Please select an option (Required)		
Organisation data	Reduced Rate (5%)	Please select an option (Required)		
Tony Test 1 View and manage your organisation	Map Tenders to Xero Accounts			
settings, business transactions, and	Cash	Please select an option (Required)		Refresh
	Card	Please select an option (Required)		
y allowing access, you agree to the transfer of your data etween Xero and this application in accordance with Xero's	Map Stores to Xero Accounts and Categories			
erms of use and the application provider's terms of use and rivacy policy.	Store	Please select an option (Required)	Please select an option (Required)	Refresh
You can disconnect at any time by going to Connected apps n your Xero settings.	Store 1	Please select an option (Required)	Please select an option (Required)	
Allow access			Cancel Save Save	8 Run Now Disconnect food
Cancel				

6. Select the Xero Tenant from the dropdown menu, this is the name of the connected Xero Account.

Xero Setup			Help
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7. Select the name of the Xero Contact that the sales data will be assigned to when transferred to the Xero System (all invoices will be paid to this contact). New (Xero) Contacts can be created from the dropdown, for full management and information please use the Xero Portal.

		Help
Xero Tenant	Tony Test 1 - Refrest	i
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8. Choose a Start Date for the integration, this is the start date for the transfer of sales data between the 2 systems and can be backdated to transfer previous data.

Xero Contact	Till I	Till Integration - 2022-07-20 Image: Compared and Compa						• Refresh (j)	
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Cash	31	1	2	3	4	5	6	• Refresh	
Card	Plea	se sel	ect ar	optio	n (Re	auirea	0	·	

9. Use the drop-down menu's to 'map' Register Taxes (including previously deleted ones) to their appropriate Taxes in the Xero System. New (Xero) Taxes can be created from the dropdown, for full management and information please use the Xero Portal.

Map Taxes to Xero Taxes		
Zero Rate (0%)	Please select an option (Required)	Refresh
Standard Rate (20%)	Please select an option (Required) 20% (VAT on Income)	
Reduced Rate (5%)	5% (VAT on Income)	
Map Tenders to Xero Accounts	Exempt Income No VAT	
Cash	Zero Rated EC Goods Income	Refresh
Card	Zero Rated EC Services Zero Rated Income	
Map Stores to Xero Accounts and Categories	Create New	
Store	Please select an option (Required) • Please select an option (Required) •	Refresh (i)

10. Use the drop-down menu's to 'map' Register tender types (including previously deleted ones) to their appropriate 'Accounts' in the Xero System. New (Xero) Accounts can be created from the dropdown, for full management and information please use the Xero Portal.

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	Reduced Rate (5%)	5% (VAL on Income)
	Map Tenders to Xero Accounts	
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	ro T	Cancel

 Use the drop-down menu's to 'map' Register Stores (including previously deleted ones) to their appropriate 'Accounts' and 'Categories' in the Xero System. New (Xero) Accounts and Categories can be created from the dropdown, for full management and information please use the Xero Portal.

Store	Please select an option (Req	juired) - Please select a	an option (Required) -	Refresh
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12. Check all your details and when happy click the Save & Run Now button which will transfer your data immediately, or click the Save button which will transfer the data at midnight. Once setup, your sales data can be found in the Invoices menu within Xero.

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