

1 Connecting Xero

1.1 Login to **Capital Guardians**

1.2 Select **Batch**

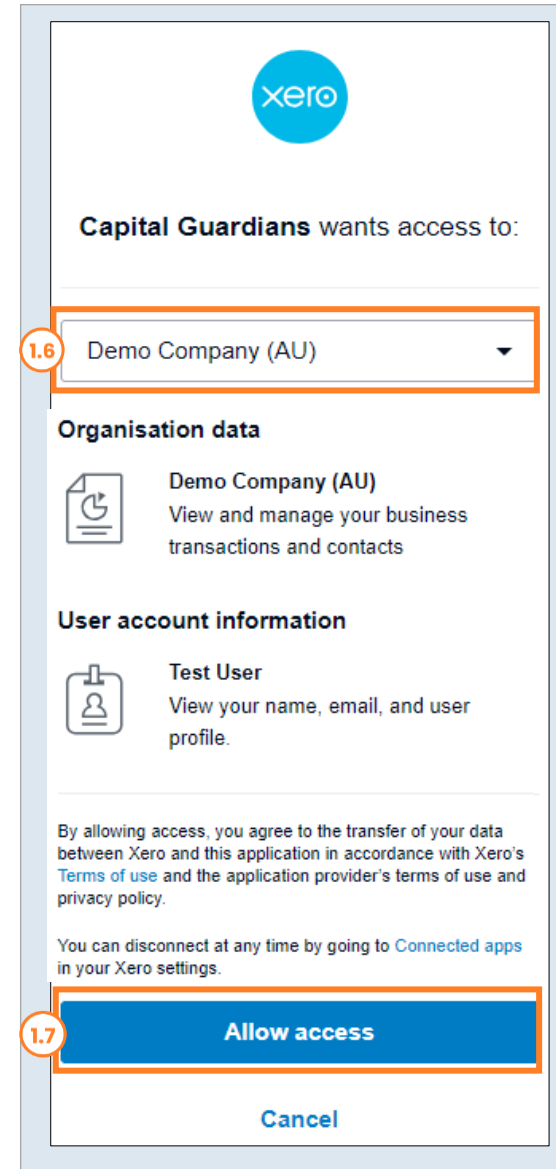
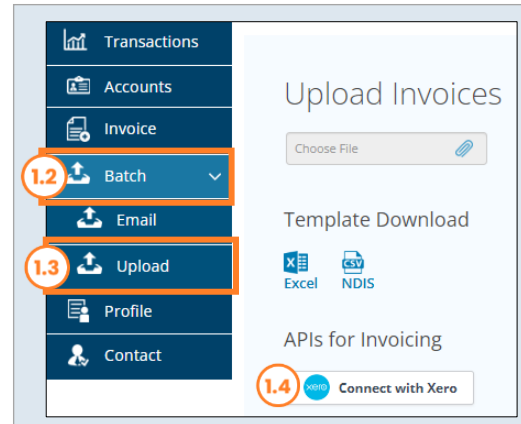
1.3 Select **Upload**

1.4 Select **Connect with Xero** to be directed to the Xero API site

1.5 Logon to **Xero**

1.6 Select your organisation

1.7 Select **Allow access**



Note:

- Capital Guardians only access information for approved invoices of our mutual clients (contacts where we share an account identifier).
- Capital Guardians operates with an ASIC Australian Financial Services Licence (AFSL) and has bank grade security and privacy.

For more information, refer to:

- <https://capitalguardians.com/privacy/>
- <https://capitalguardians.com/security/>

2 Set up Billing ID & Account Number

2.1 In **Capital Guardians**, select **Accounts**

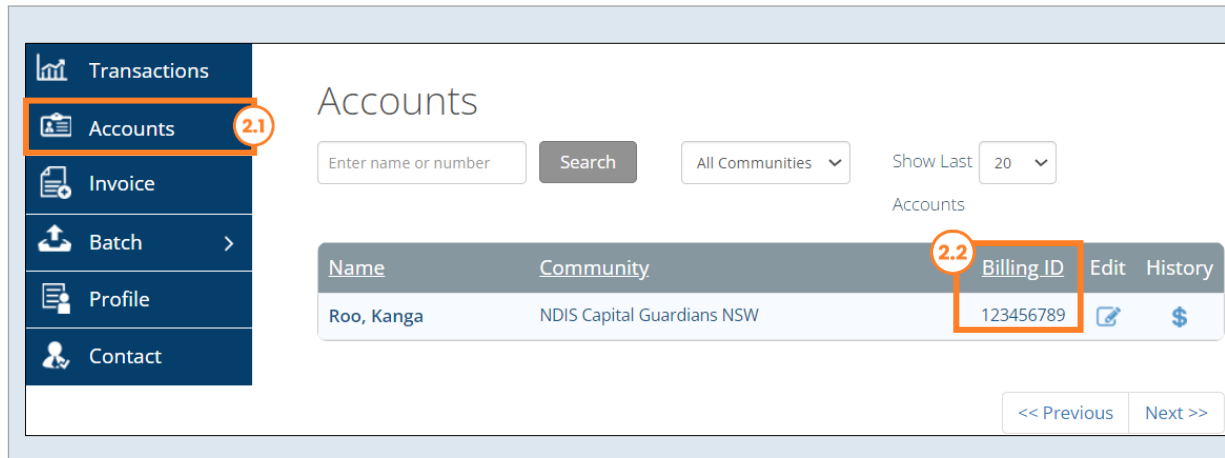
2.2 Review the **Billing ID**

Note: The Billing ID is by default the NDIS ID or Aged Care ID in Capital Guardians. You can edit to your own Billing ID if needed

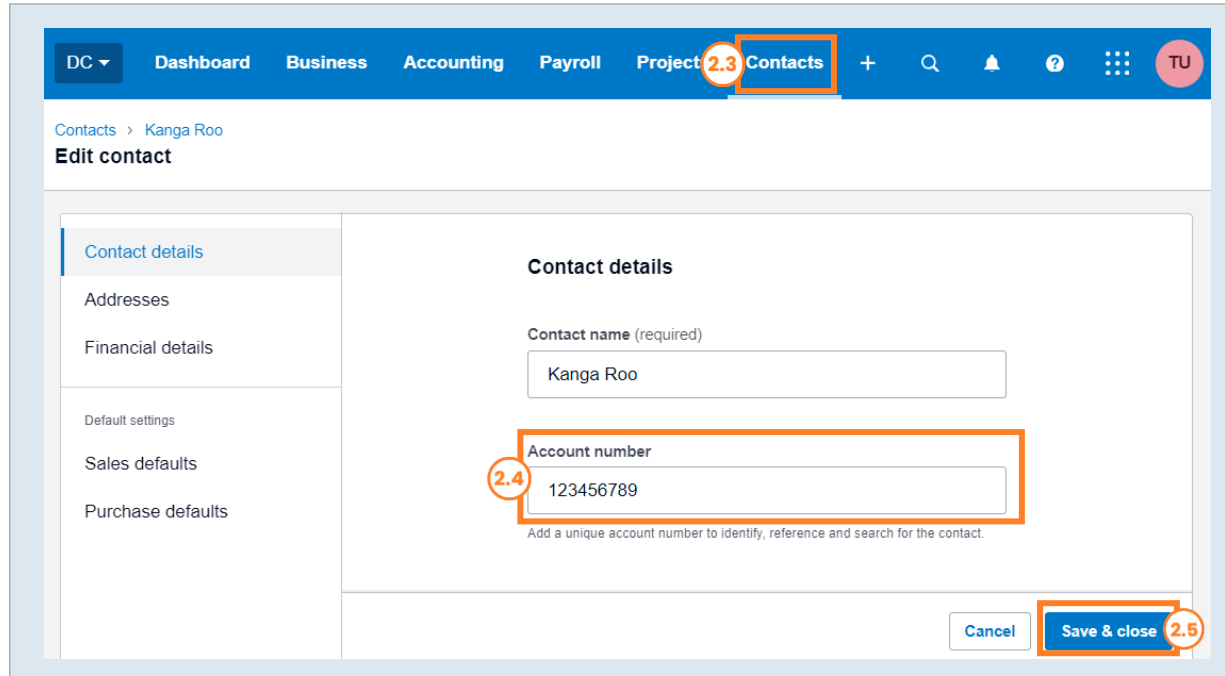
2.3 In **Xero**, create or edit a new **Contact**

2.4 Update the **Account Number** field to match the **Billing ID** from the Capital Guardians platform

2.5 Select **Save & close**



The screenshot shows the 'Accounts' page in Capital Guardians. On the left, a navigation menu has 'Accounts' highlighted with a red box and a callout '2.1'. The main content area shows a search bar and a table of accounts. The table has columns for Name, Community, Billing ID, Edit, and History. One row is visible: 'Roo, Kanga' in the 'Name' column, 'NDIS Capital Guardians NSW' in the 'Community' column, and '123456789' in the 'Billing ID' column. The 'Billing ID' cell is highlighted with a red box and a callout '2.2'. At the bottom right, there are '<< Previous' and 'Next >>' buttons.



The screenshot shows the 'Edit contact' page in Xero. The top navigation bar has 'Contacts' highlighted with a red box and a callout '2.3'. The page title is 'Edit contact' and the breadcrumb is 'Contacts > Kanga Roo'. On the left, a sidebar menu has 'Contact details' selected. The main form area has a 'Contact details' section with a 'Contact name (required)' field containing 'Kanga Roo'. Below it is an 'Account number' field containing '123456789', which is highlighted with a red box and a callout '2.4'. Below the form is a note: 'Add a unique account number to identify, reference and search for the contact.' At the bottom right, there are 'Cancel' and 'Save & close' buttons, with the latter highlighted by a red box and a callout '2.5'.

3 Setup/Select NDIS Item (NDIS Providers Only)

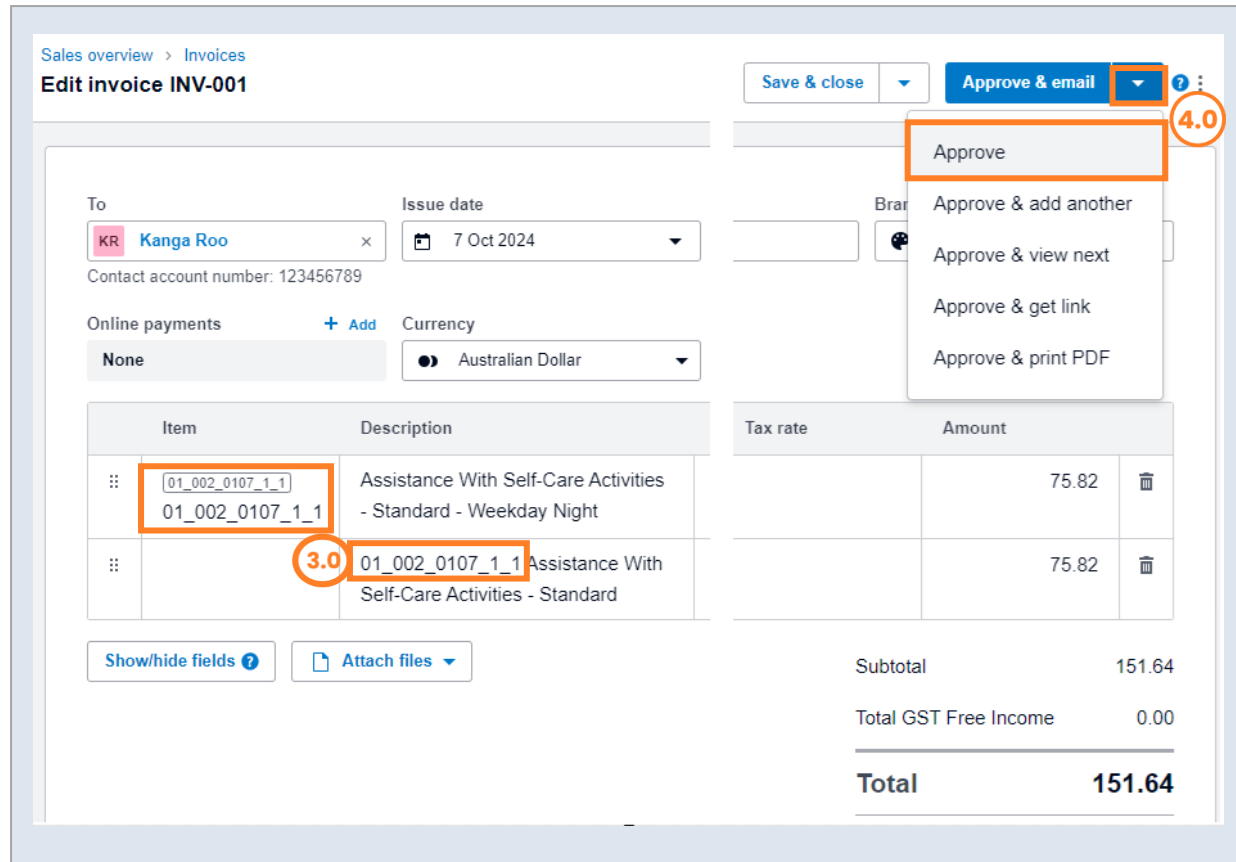
In **Xero**, ensure that the NDIS Support Item Number is included in the **Item** field, in the same format outlined in the [NDIS Support Catalogue](#).

Note: The NDIS Support Item Number can be included in the **Description** field if preferred.

4 Complete & Approve Invoice

After selecting **Approve** in Xero, the invoice will be automatically uploaded in Capital Guardians in 15+ minutes between 9am -5pm (AET).

You can Login to Capital Guardians to check the status of the invoice via the **Transaction** Menu.



Sales overview > Invoices
Edit invoice INV-001

Save & close | Approve & email (4.0)

To: KR Kanga Roo x | Issue date: 7 Oct 2024
Contact account number: 123456789

Online payments: None + Add | Currency: Australian Dollar

Item	Description	Tax rate	Amount
01_002_0107_1_1 01_002_0107_1_1	Assistance With Self-Care Activities - Standard - Weekday Night		75.82
01_002_0107_1_1	Assistance With Self-Care Activities - Standard		75.82

Showhide fields | Attach files

Subtotal: 151.64
Total GST Free Income: 0.00
Total: 151.64