

# Xero Invoicing Setup

1. Connecting Xero > 2. Billing ID & Account Number > 3. Set up NDIS Item (NDIS Providers only) > 4. Complete & Approve Invoice

## 1 Connecting Xero

1.1 Login to **Capital Guardians**

1.2 Select **Batch**

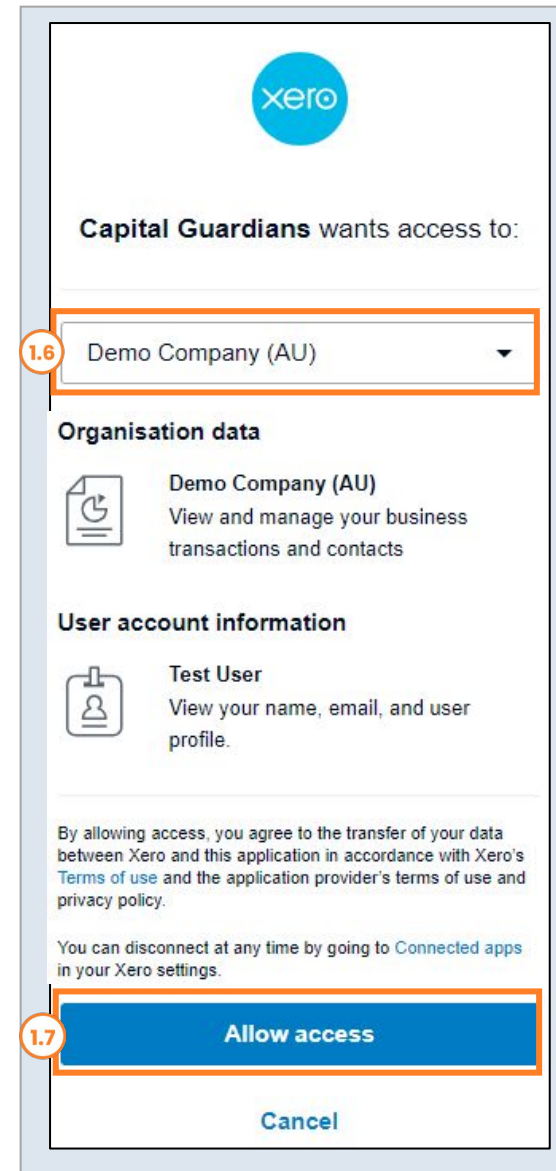
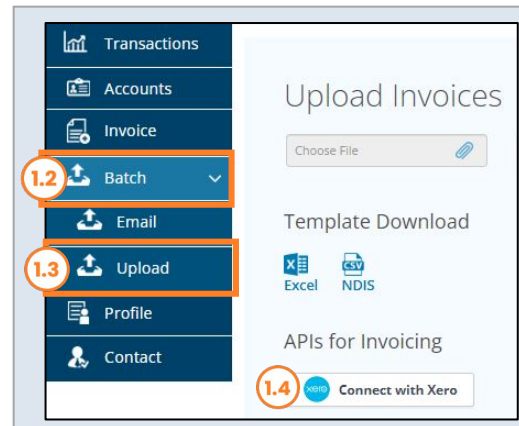
1.3 Select **Upload**

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**

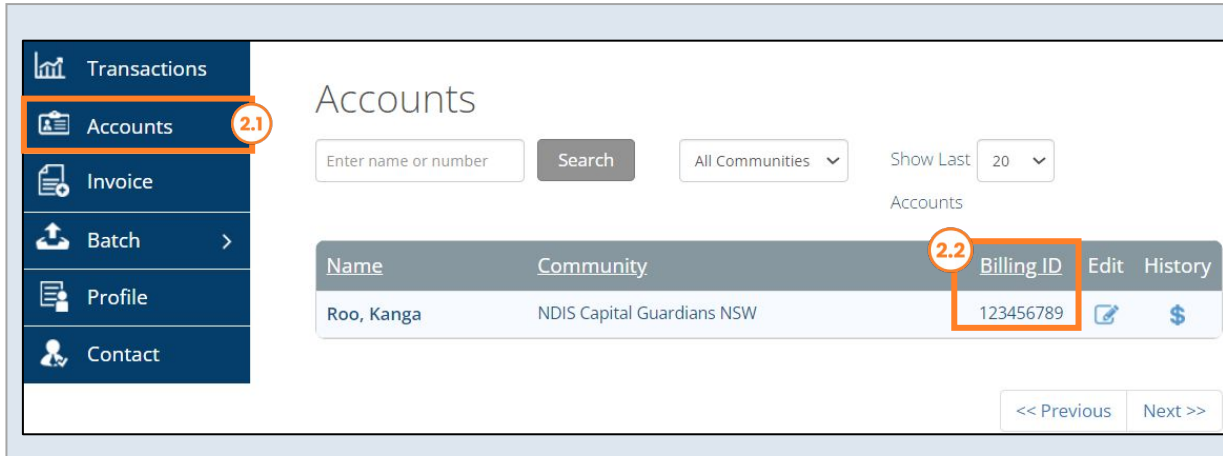
2.2 Review the **Billing ID**

**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**

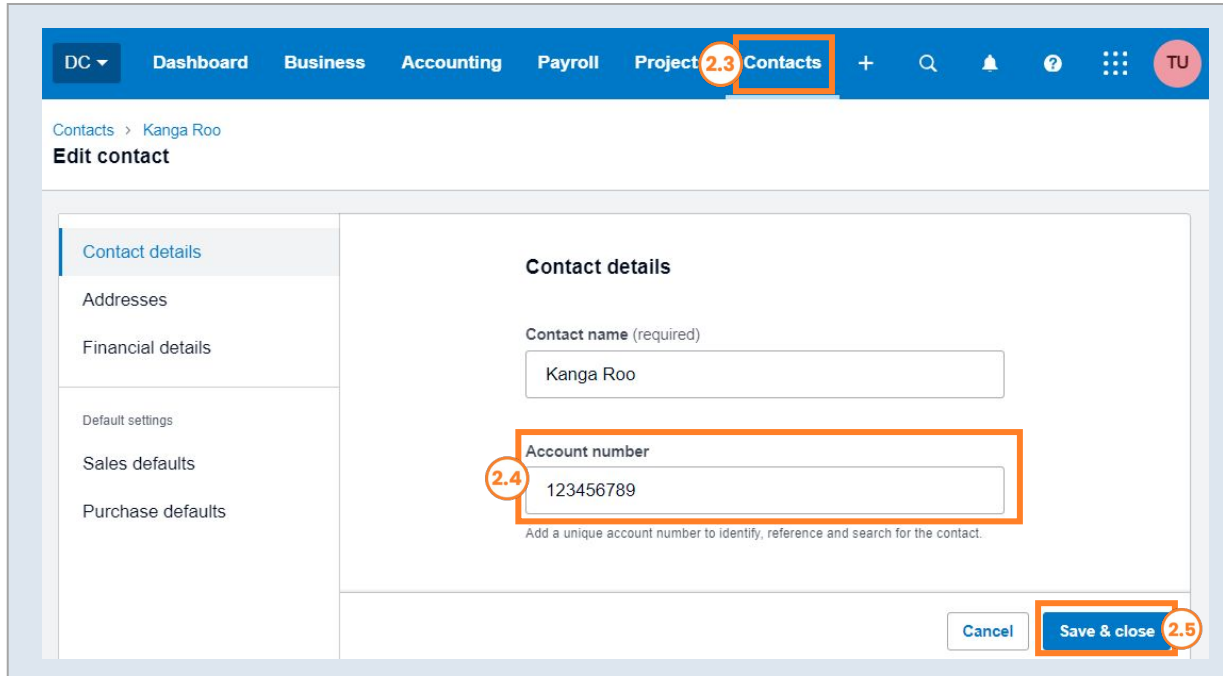
2.4 Update the **Account Number** field to match the **Billing ID** from the Capital Guardians platform

2.5 Select **Save & close**



The screenshot shows the 'Accounts' page in Capital Guardians. On the left sidebar, the 'Accounts' menu item is highlighted with a red box and labeled '2.1'. The main content area shows a table of accounts. The first row is highlighted, and the 'Billing ID' column for 'Roo, Kanga' is highlighted with a red box and labeled '2.2'. The value '123456789' is visible in the Billing ID field. Below the table are navigation buttons: '<< Previous' and 'Next >>'.

Name	Community	Billing ID	Edit	History
Roo, Kanga	NDIS Capital Guardians NSW	123456789		



The screenshot shows the 'Edit contact' page in Xero. The 'Contacts' menu item in the top navigation bar is highlighted with a red box and labeled '2.3'. The 'Account number' field is highlighted with a red box and labeled '2.4', containing the value '123456789'. Below the field is a note: 'Add a unique account number to identify, reference and search for the contact.' At the bottom right, the 'Save & close' button is highlighted with a red box and labeled '2.5'.

DC Dashboard Business Accounting Payroll Project **2.3** Contacts + 🔍 🔔 ⓘ ⋮ TU

Contacts > Kanga Roo

### Edit contact

- Contact details
- Addresses
- Financial details
- Default settings
- Sales defaults
- Purchase defaults

**Contact details**

Contact name (required)  
Kanga Roo

**2.4** Account number  
123456789  
Add a unique account number to identify, reference and search for the contact.

Cancel **2.5** Save & close

## 3 Setup/Select NDIS Item (NDIS Providers Only)

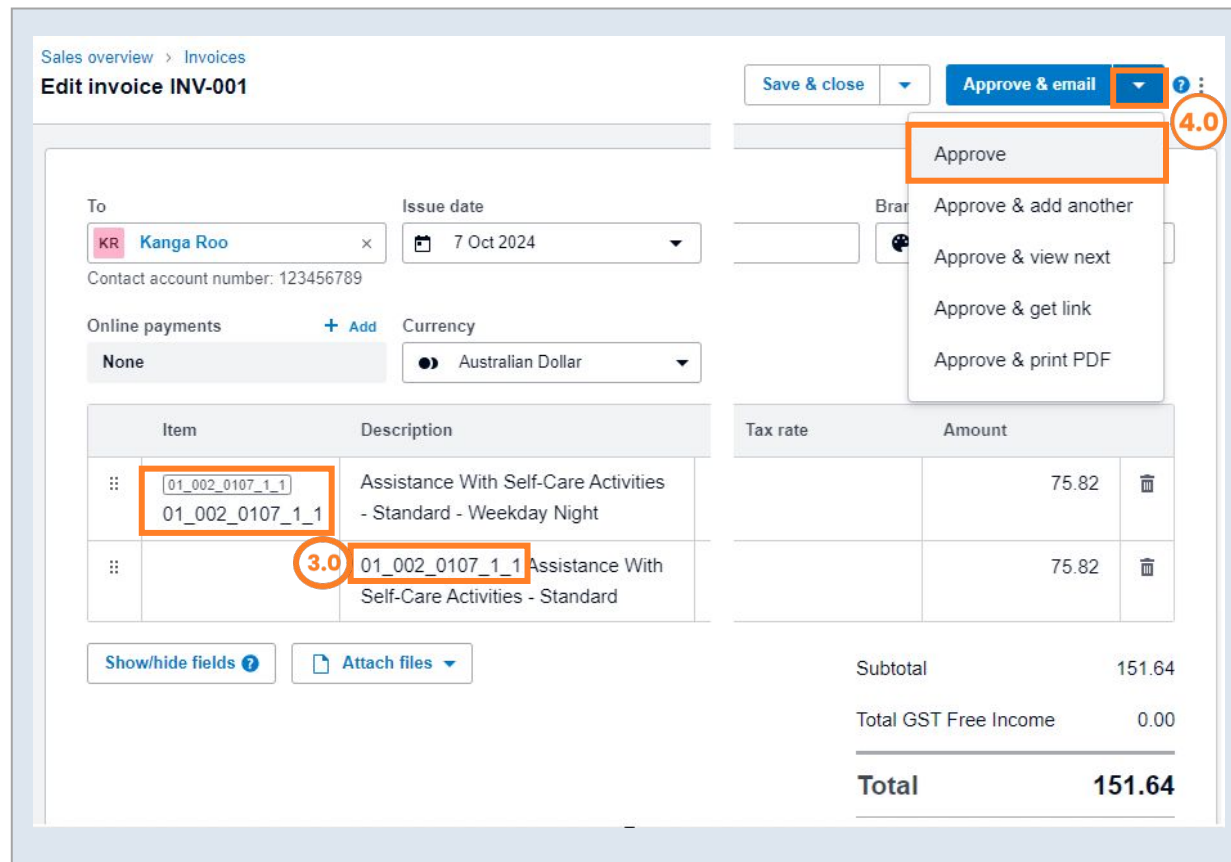
In **Xero**, ensure that the NDIS Support Item Number is included in the **Item** field, in the same format outlined in the [NDIS Support Catalogue](#).

**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

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	Assistance With Self-Care Activities - Standard - Weekday Night		75.82
01_002_0107_1_1	Assistance With Self-Care Activities - Standard		75.82

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