

Xero - Supporting frequently asked questions and errors

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Introduction

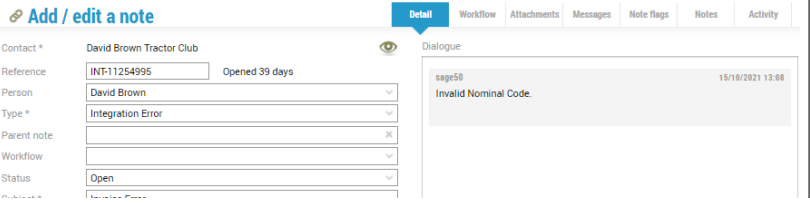
This page provides details on common questions and "issues" with the Sage 50 integration with Job Watch

General

The below section covers the running and support of the integration

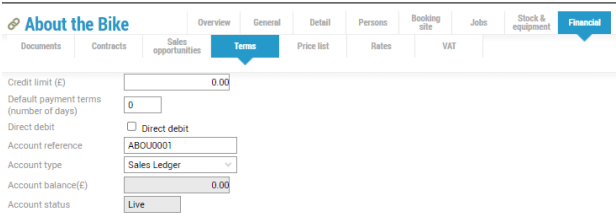
Frequently asked supporting questions - general

No	Question	Answer
1	What is synchronised between JobWatch and Xero?	- From JobWatch Contacts, Invoices/Credit notes, Purchase orders and Payments - From Xero - Contacts and Sales Receipts
2	Does the integration synchronise Stock?	The integration does not synchronise stock. Whilst you can add stock items to invoices and credit notes and manually link stock, there is no automatic integration between JobWatch and Xero stock.
3	Can I synchronise contacts from both JobWatch and Xero?	You must choose where contacts are entered - JobWatch or Xero, not both.
4	Can I synchronise payments from both JobWatch and Xero?	You must choose where you wish to process payments - JobWatch or Xero, not both
5	How does the integration work?	The integration is configured and run from within JobWatch; when you first configure the system you will need a licence key and a connection to a Xero company. A service runs and processes changes made in JobWatch and similarly a separate web hook is used to read changes made in Xero. Both processes read the configuration file and process the changes accordingly to the settings.
6	Is anything installed on my PC/Server?	No. The integration like JobWatch/Xero is run from within the cloud.
7	What do I need to do to start synchronising between JobWatch and Xero	Before switching the integration on, we advise that you must go through the integration documentation to ensure that you fully understand the implications for transferring data between your financial system and JobWatch. For ease of use, we have listed below a supporting frequently asked question and list of errors that can occur where the integration fails.

No	Question	Answer
8	How do I know if something has gone wrong?	Where errors occur a contact note is created/updated with details of the error. Example below: 
9	What is the process for error notes?	You must review errors on a daily basis and correct any errors that occur. You can set up alerts in JobWatch to popup as reminders and there is a note report that can be used to help with error processing.

Contacts

Frequently asked supporting questions - contacts

No	Question	What do I need to do?
1	How are JobWatch contacts linked to a Xero contact?	A JobWatch contact record is linked to Xero contact by its unique account reference. The account reference is stored against both JobWatch and Xero contact record. In JobWatch it is located against the CRM record in Financials => Terms (see example below). To expose these fields, the financial integration type must be set. 
2	How does the integration know which contacts to synchronise?	When you configure the integration, you will need to specify which of your JobWatch contact groups will be used for synchronising contacts to Xero. All contacts in these groups will exist in Xero and have a matching account reference.
3	My contact groups contain a mix contacts, is this okay?	When configuring the integration and specifying the group that will be used to synchronise contacts, you must ensure that all account contacts this group(s) have a corresponding record in Xero.
4	I have a lot of contacts, some exist, some do not, is there a quick way to link JobWatch to Xero?	You must review the data in both systems before switching on the integration. There is an import routine to update the account references, and you must ensure that any record that exists in Xero but not JobWatch is imported into JobWatch. Where records exist in JobWatch but not Xero, you must either enter these in Xero manually or remove them from the group. We will review your data before switching on the integration and where the data is invalid, we will not turn on the integration.
5	Can I have multiple groups with the same contact type?	You can specify one or more groups as long as the group contains the same type of contact record.

No	Question	What do I need to do?
6	When synchronising contacts from JobWatch, what information does it synchronise?	The integration will synchronise the contact name, address and primary person details when a contact is created in JobWatch. When updating a contact, the primary person details can be amended but the name/email must match the person in JobWatch.
7	I want to synchronise the credit limit and balance from Xero	The Xero API does not currently provide access to the credit limit field and at present there are no plans to integrate the account balance due limitations with the Xero API.
8	Do site contacts require the parents account reference?	No. You must ensure that the account reference blank.
9	I want to synchronise newly created contacts from JobWatch to Sage 50 – how does the JobWatch contact record get its account reference?	When synchronising from JobWatch to Sage 50, you have two options. You can manually add the account reference, or we can set the integration to automatic.
10	How is the account reference generated for a contact created in JobWatch	When configuring the user integration, the user will specify the number of characters taken from the contact name and what number sequence to append. Remember that you can only specify a total of 8 characters or less. Example; you choose 3 characters and append 001. The routine reads our contact record and when generating the reference, it takes 3 characters from contact name and appends 001. It reads Sage to confirm whether the account reference is unique. If not, it appends 002 and so on until the account reference is unique. It updates JobWatch and creates the record in Sage 50.

Contact Errors

No	Error	What does this mean?	How do I fix it?
1	The integration attempted to update: Xero but failed returning the error: The contact name Xero is already assigned to another contact. The contact name must be unique across all active contacts.	Unlike JobWatch, Xero does not cater for contacts with the same account name.	You must ensure that all contact names in JobWatch are unique.
2	The integration attempted to update: Lensbury Avenue but failed returning the error: One of the taxable defaults is incorrect. Please check your Xero settings.	One of the taxable defaults set in your Xero configuration is incorrect	Modify the configuration settings and choose valid tax codes for sales and purchase.
3	The address could not be geocoded	When created contacts in Xero, the contact had no address	You must specify an address when creating a contact record in Xero
4	When attempting to get contact details from Xero - nothing was returned for contact: xxxx for customer xxx	The Xero contact record has a blank account reference	When synchronising contacts from Xero to JobWatch, you must ensure that the record has a valid contact account reference.

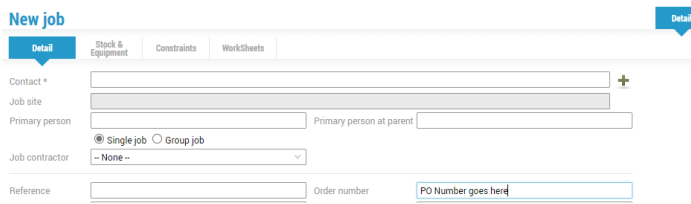
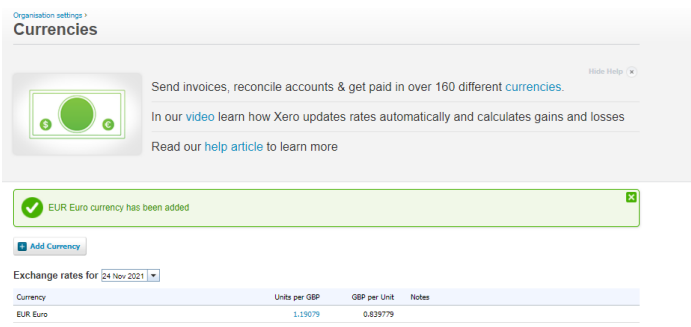
No	Error	What does this mean?	How do I fix it?
5	The integration attempted to generate a reference for 'x,' but the contact's name length was less than the required format. You will need to amend the contact's name, so the length is equal to or greater than the required number of characters.	The integration attempted to generate a reference for 'x,' but the contact's name length was less than the required format. You will need to amend the contact's name, so the length is equal to or greater than the required number of characters. When generating a contact reference, the system will create a reference based on the defined number of characters from the user configuration and appended numerical sequence. Modify the contact's name and ensure that the contact's name length is greater than the defined number of characters in the user configuration.	The integration attempted to generate a reference for 'x,' but the contact's name length was less than the required format. You will need to amend the contact's name, so the length is equal to or greater than the required number of characters. When generating a contact reference, the system will create a reference based on the defined number of characters from the user configuration and appended numerical sequence. Modify the contact's name and ensure that the contact's name length is greater than the defined number of characters in the user configuration.
6	The integration attempted to update: 'x' but failed returning the error: The Account Number already exists. Please enter a difference Account Number.	You cannot create two contact records in Xero with the same account reference.	Amend the account reference manually and choose a unique account reference

Invoices, Credit notes and Purchase orders

Frequently asked supporting questions - transactions

No	Question	What do I need to do?
1	What type of JobWatch transactions are synchronised?	Invoices, credit notes and purchase orders are generated in JobWatch and are synchronised to Xero.
2	What is the process for posting purchase invoices?	JobWatch does not cater for purchase invoices, only purchase orders. You can choose to create and synchronise a purchase order in JobWatch but anything after that is a manual process.
3	What information is required when posting an invoice, credit note or purchase order?	When entering an invoice, credit note or purchase order, you must ensure that each line has at least a valid and tax code and if you enter a nominal, the type of tax code matches. For example; you cannot add a line with revenue account code but an expenses tax code.
4	If I post a purchase order from JobWatch to Xero, how do I receive the stock?	When you synchronise a purchase order from JobWatch to Xero, anything after that process is manual. This means that you will need to receive stock in both JobWatch and Xero and process the invoice in Xero.
5	Can I create a transaction in Xero and synchronise it to JobWatch?	Transactions are created in JobWatch only. Any transactions created or amended in Xero will not update JobWatch.
6	If I amend a synchronised transaction in Xero, will it update JobWatch?	No. Any amendments made to a transaction in Xero will not be reflected in JobWatch.
7	Can I amend a JobWatch transaction after it has been synchronised with Xero?	Once a transaction has been marked as send to financial package it cannot be modified.
8	At what point does a transaction synchronise to Xero?	A transaction in JobWatch is synchronised when the invoice, credit note or purchase order is marked as send to financial package. At this point the transaction is created in Xero.

No	Question	What do I need to do?
9	What is the process for posting an invoice, credit note and purchase order?	• Invoice / Credit note The invoice / credit note is created in JobWatch and lines are added to the transaction. The user can choose to add one or more tracking categories depending on whether they were imported. Once the user has completed the transaction, they then mark the it as send to financial package. The transaction is created in Xero and the document number overwrites the JobWatch reference number. • Purchase Order The purchase order follows the same process apart from adding a supplier and a cost to each line. The core difference is that the document is created once the transaction has been saved instead of when it is synchronised. The purpose of this is to enable the user to treat the PO like a purchase requisition and confirm costs and quantities before it is synchronised. The JobWatch reference is used to update the Xero document number.
10	If I enter an invoice or credit note against a site in JobWatch how does it get posted to the correct account?	Invoices and Credit notes are posted to the account reference assigned to the contact or if empty to the parent contact associated with the site contact. Purchase orders are posted to the supplier contact associated with the purchase order.
11	Can I add negative lines to a sales invoice?	You can add negative lines on an invoice. These will be posted against the Xero invoice
12	I would like to add stock items to an invoice, do these appear as stock items on the Xero invoice?	This depends on the configuration setting - enforce stock. Where this option is checked, items added to the invoice will be checked against Xero by the stock code. Where a stock item has no stock code or the stock code does not match, the integration will fail the invoice and an error note will be generated.

No	Question	What do I need to do?
13	I create my invoices from Jobs and want the PO number from the Job to show on my invoice, is this possible?	When creating a Job you can assign a PO number to the order number field.  When posting an invoice in Xero, the order number field is displayed against the reference field.
14	Can I post foreign currency transactions?	In JobWatch you can set the currency of the transaction to any currency as long as the currency has been set up in Xero. 
15	I want to synchronise invoices so they are automatically ready for payment. Is this possible?	When configuring the options, you can choose what status to set when the invoice, credit note or purchase order is synchronised. You can opt to post invoices and credits at authorised and purchase orders as drafts.
16	Does the Job reference synchronise?	No. We only synchronise the job order number as shown above in question 13.

Transaction Errors

No	Error	What does this mean?	How do I fix it?
1	Invoice: xxxx failed to process with the following error: The TaxType code 'INPUT2' cannot be used with account code '200'.	You cannot process a transaction with a nominal code that is does not match the tax code. For example; you cannot add an expense account code and use a income tax code.	Amend the transaction and add the correct account code/tax code.
2	CreditNote: xxxx failed to process with the following error: Invoice: xxxx - there was a problem adding one of the stockitems. Please review and confirm all stock items exist in both systems and are set up correctly.	Stock is enforced and this item does not exist in Xero or the stock code does not match	Check both systems and ensure that the stock code matches the product code (including casing).
3	Invoice – 'x' failed to process with the following error: 'x' – Only 'x' items available to sell	You cannot process an invoice with a stock item that is tracked in Xero and there is insufficient stock available.	Manually correct the stock item in Xero to correct the problem.
4	Purchase Order – 'x' failed to process with the following error PO (Purchase Order): 'x' – The stock item does not exist in JobWatch	The stock item added to a purchase order, invoice or credit note that does not exist in Xero.	Add the stock item to Xero and make sure that the item code in Xero matches the stock item code in JobWatch
5	Invoice: xxxx failed to process with the following error: Invoice: xxxx - the stock item does not exist in Xero.	The invoice on the transaction line does not exist in Xero.	You must check both systems and confirm that the stock item exists and has a matching stock code. The code is case sensitive.
6	Invoice – x failed to process with the following error. You cannot post an invoice with a blank invoice description line to Xero.	You cannot synchronise an invoice to Xero that has a blank description	Amend the invoice in JobWatch and add a description

Payments / Receipts

Frequently asked supporting questions - payments/receipts

No	Question	What do I need to do?
1	Can I process payments in JobWatch and Xero	The configuration provides the option to choose whether you want to process payments from JobWatch or sales receipts from Xero. You cannot do both.
2	Which bank account does it use?	When paying an invoice, the routine will use the bank account associated with the transaction and where empty it will use the default bank account held in the configuration file.
3	Can I pay a foreign currency invoices from JobWatch?	The bank account defined against the invoice determines whether the bank/currency that will be used for the payment in Xero. You can pay the invoice in the currency of the invoice or the base currency of the company; you cannot pay an invoice in any other currency
4	Can I part pay an invoice in JobWatch/Sage 50?	You can pay up to and including the amount of the invoice from JobWatch or Sage 50. When paying an invoice from Sage 50, the part payment amount is posted to the invoice. When posting the next payment, the original payment in JobWatch is replaced with the total amount paid. I.e. It will only ever show one payment, not the individual part payments.
5	Can I overpay an invoice?	No.
6	How do I process refunds in JobWatch?	Where discounts / refunds are required, you would need to process these manually in Xero.
7	I pay invoices from JobWatch and allocated a credit note against the invoice directly in Sage 50. The invoice only shows as part paid, why?	When posting from JobWatch, it only records the receipts recorded. When you enter a credit note against the invoice in Sage 50, it does not update JobWatch. Whilst you can process payments in JobWatch, we do advise that payments are done in Sage 50 for this very reason.

No	Question	What do I need to do?
8	I've incorrectly paid an invoice in JobWatch, how do I correct this?	You would need to mark the invoice as unpaid and correct the corresponding transaction paid in Sage 50
9	I want to start processing payments from JobWatch from a date, is this possible?	When configuring the integration, you will be able to choose the start date of the integration. Payments will be processed from this point forwards.
10	What happens if I try to pay an invoice that has not been approved	The JobWatch invoice will show as paid but the Xero invoice will fail to update. An error note will be generated for the error.

Receipt Errors

No	Error	What does this mean?	How do I fix it?
1	There was a problem creating a payment for Invoice 'x.' The following error was thrown: Payments can only be made against Authorised documents – Payment amount exceeds the amount outstanding on this document	A payment is being made against a document that does not have the correct status.	You will need to authorise the Xero payment, unpay the invoice in JobWatch and mark it as paid to re-synchronise the payment.
2	There was a problem creating a payment for invoice 'x.' The following error was thrown: The invoice, payment and organisation cannot currently handle a 3-currency transaction	There was a problem creating a payment for invoice 'x.' The following error was thrown: The invoice, payment and organisation cannot currently handle a 3-currency transaction The invoice, payment and organisation were different currencies. The invoice and payment must be at least one of the organisation currencies.	Modify the bank account on the invoice to be the currency of the organisation or invoice. Mark as unpaid and repay the invoice.
3	There was a problem creating a payment for Invoice: 'x.' The following error was thrown: Payment amount exceeds the amount outstanding on this document.	You cannot overpay an invoice using the integration tool. You can only pay up to and including the amount outstanding on the invoice	Delete the payment on the invoice and add the correct amount.