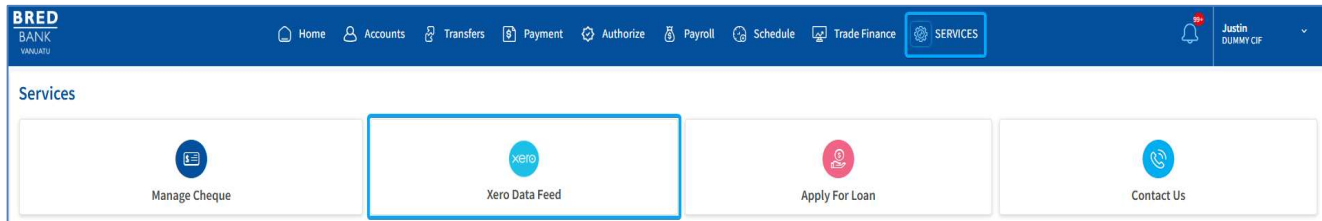


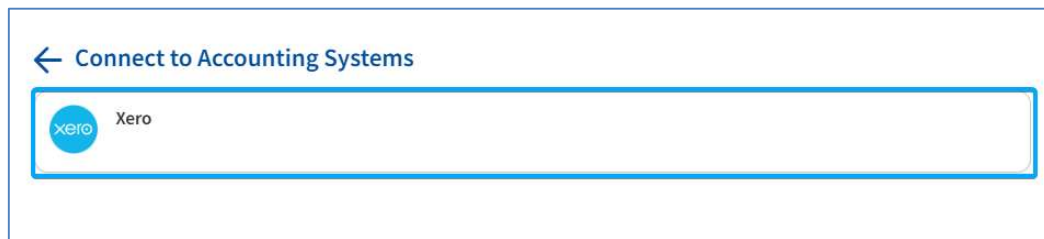
How to manage Xero connector

You can also create Xero connector to sync your account statement from BRED Business Connect:

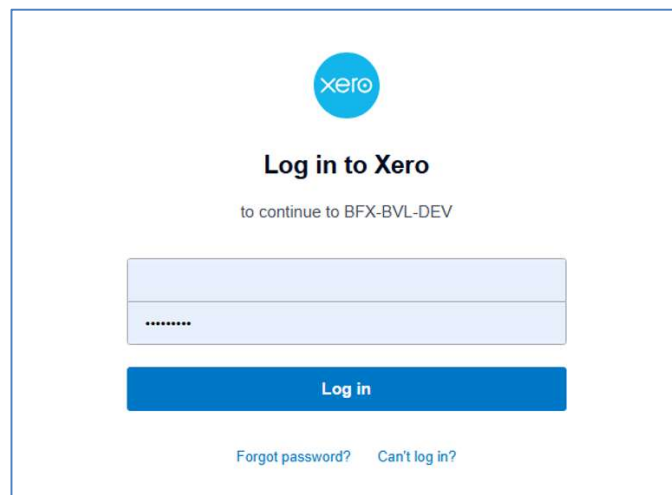
1. Go to [SERVICES](#)
2. Click on [Manage Connections](#)

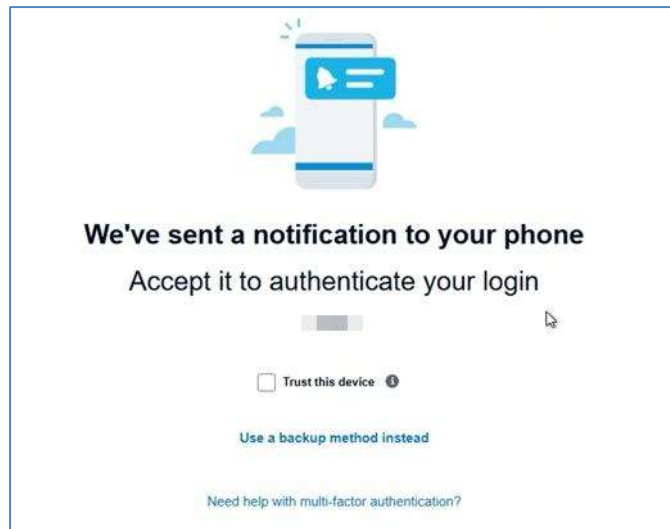


3. Click on [Xero](#)

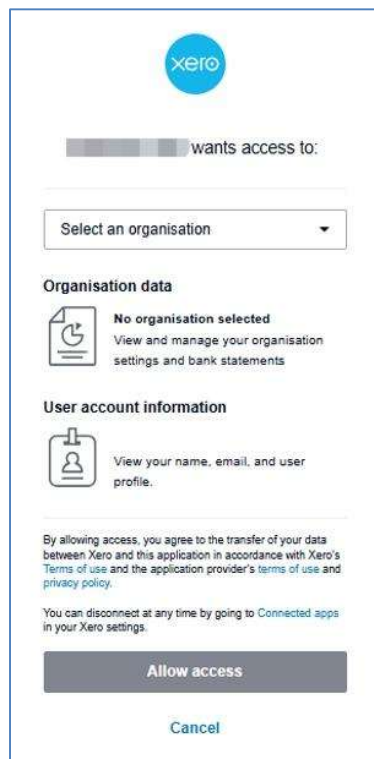


4. Login [with your Xero credentials](#)





5. Once verified, select the **Xero Company**



6. BRED BUSINESS CONNECT will automatically redirect you back to the **SERVICES** page.
7. Repeat **step 2 and 3**
8. Select **Financial Account** within BRED Business Connect that you want to link to your Xero account

Xero Integration
Company Name: BRED Bank Test (2024-11)

Select BRED account(s) to connect with Xero

1 ☐ U Account
020028021123019

Please Note: You can change your preferences anytime.

By processing this I accept the service [Terms and Conditions](#)

9. **Enter Xero account name.** Alternatively, select **Xero account** from the dropdown menu (if applicable). then click on **Create**

Xero Integration
Company Name: BRED Bank Test (2024-11)

Select BRED account(s) to connect with Xero

☒ U Account : 020028021123019

2

☐ UAT BBS - Xero test: 020028021123019

☐ xero Test: 020026371123020

By Enter xero account 3

4 **CREATE**

10. Click on **Submit**

 **Xero Integration**

Company Name: BRED Bank Test (2024-11)

×

Select BRED account(s) to connect with Xero

☒ U Account : 020028021123019

Xero account - UAT BBS - Xero test : 020028021123019

Please Note: You can change your preferences anytime.

By processing this I accept the service [Terms and Conditions](#)

1

SUBMIT

11. Enter **OTP**

Confirmation

×

RESEND OTP

To confirm your request, please enter the code received via EMAIL on your email address - within 9:50

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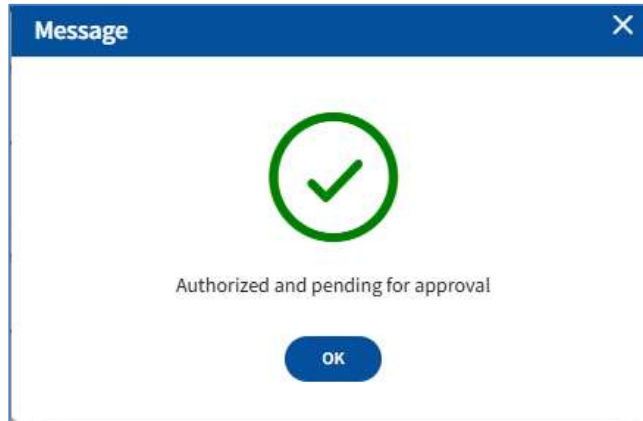
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•

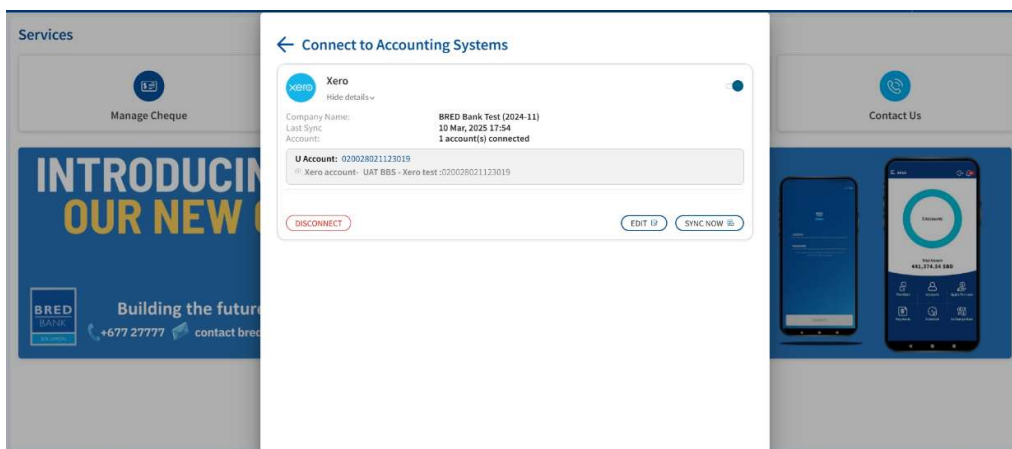
BACK

SUBMIT

12. Connector creation request will be created which will go **through an authorization process**, as per authorization rules defined



13. Repeat **step 1 and 2** (Go to SERVICES, Click on Manage Connections) to view your connector.



How to manually sync with Xero connector

Users can manually feed the Xero statements by clicking on **Sync Now** button on the following screen.

← Connect to Accounting Systems

**Xero**
Hide details ▾

Company Name:

BRED Bank Test (2024-11)

Last Sync

10 Mar, 2025 17:54

Account:

1 account(s) connected

U Account: 020028021123019

Xero account- UAT BBS - Xero test :020028021123019

DISCONNECT

EDIT 

1 SYNC NOW 

After successful synching of statements with XERO, the **Sync now** button would be display as below:

← Connect to Accounting Systems

**Xero**
Hide details ▾

Company Name:

BRED Bank Test (2024-11)

Last Sync

10 Mar, 2025 17:54

Account:

1 account(s) connected

U Account: 020028021123019

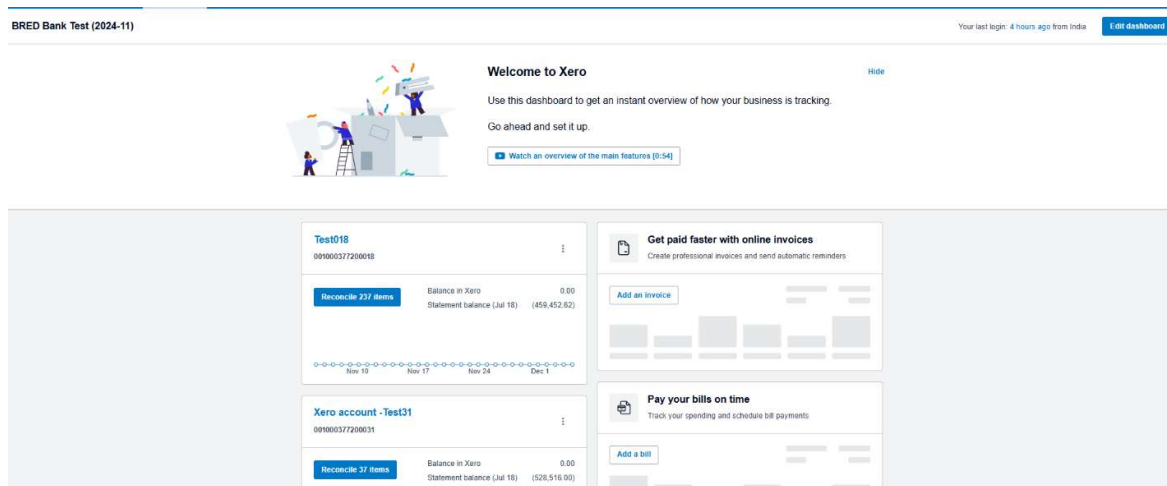
Xero account- UAT BBS - Xero test :020028021123019

DISCONNECT

EDIT 

SYNCED 

After successful synching of data, you can check the statements on XERO by log-in into Xero account with Xero credentials. Xero dashboard will show as in the following screen.



1. Click on **Reconcile** on the account which linked with BRED BUSINESS CONNECT.



2. Click on **Bank statements**

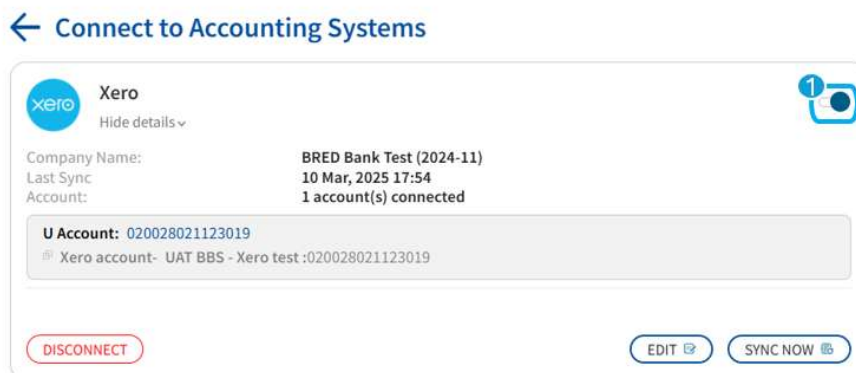
Reconcile (98) Cash coding Bank statements Account transactions												
Showing Statement lines ▼ No transactions selected Search												
☐	Date	Type	Payee	Particulars	Code	Reference	Analysis Code	Spent	Received	Balance	Source	Status
☐	3 Jan 2025	DEBIT		Transfer to 003274840140014 CR007 BULK CROSS CCY 14022025		2505101065414000		2,509.00			Bank Feed	Deleted
☐	3 Jan 2025	DEBIT		Transfer to 001923240130015 CR007 BULK CROSS CCY 14022025		2505101065406000		2,651.00			Bank Feed	Deleted
☐	3 Jan 2025	DEBIT		Bulk Payment Fee		2505101065047000		120.00			Bank Feed	Deleted
☐	3 Jan 2025	DEBIT		Transfer to 003630740110018 CR007 BULK CROSS CCY 14022025		2505101065047000		2,446.00			Bank Feed	Deleted
☐	3 Jan 2025	DEBIT		Transfer to 003274840140014 CR007 BULK CROSS CCY 14022025		2505101064941000		2,509.00			Bank Feed	Deleted
☐	3 Jan 2025	DEBIT		Transfer to 001923240130015 CR007 BULK CROSS CCY 14022025		2505101064934000		2,651.00			Bank Feed	Deleted
☐	3 Jan 2025	DEBIT		Bulk Payment Fee		2505101064926000		120.00			Bank Feed	Deleted

How to disable and enable Xero connector

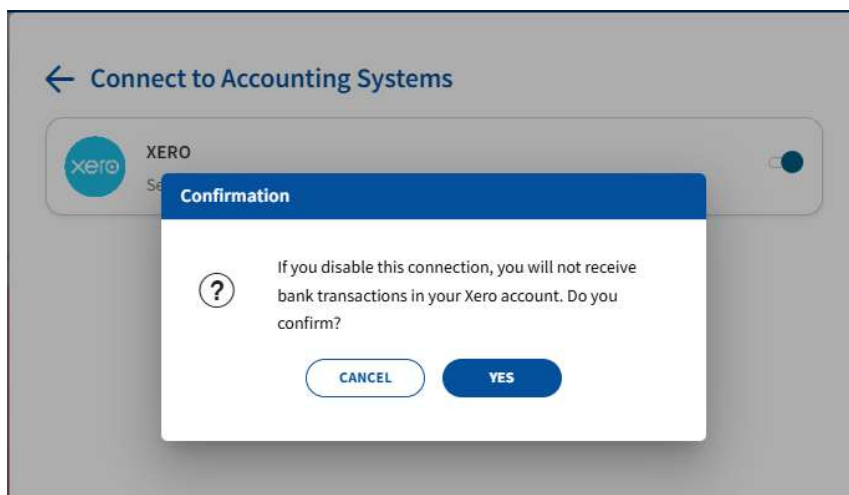
You are also able to pause or un-pause the synchronization process via BRED BUSINESS CONNECT by disable or enable the connector.

To Disable

1. Click on **Toggle** at top right.



2. Confirmation will pop-up.
3. Click **Yes**, to confirm. **No** to cancel a disable.



4. Enter **OTP**.

Confirmation

×

RESEND OTP

To confirm your request, please enter the code received via EMAIL on
your email address - within 9:50

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•

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BACK

SUBMIT

5. Connector creation request will be created which will go through an **authorization process**, as per authorization rules defined.

Message

×



Authorized and pending for approval

OK

To Enable

1. Click on **Toggle** at top right.
2. Confirmation will pop-up.

← Connect to Accounting Systems

 **Xero**
Hide details v

Company Name:

BRED Bank Test (2024-11)

Last Sync

10 Mar, 2025 17:54

Account:

1 account(s) connected

U Account: 020028021123019

 Xero account- UAT BBS - Xero test :020028021123019

1



3. Click **Yes**, to confirm. **No** to cancel a disable.

Confirmation

?

If you enable this connection, you will be able to receive bank transactions in your Xero account. Do you confirm?

CANCEL

YES

4. Enter **OTP**.

Confirmation

×

RESEND OTP

To confirm your request, please enter the code received via EMAIL on your email address - within 9:50

• • • • • |

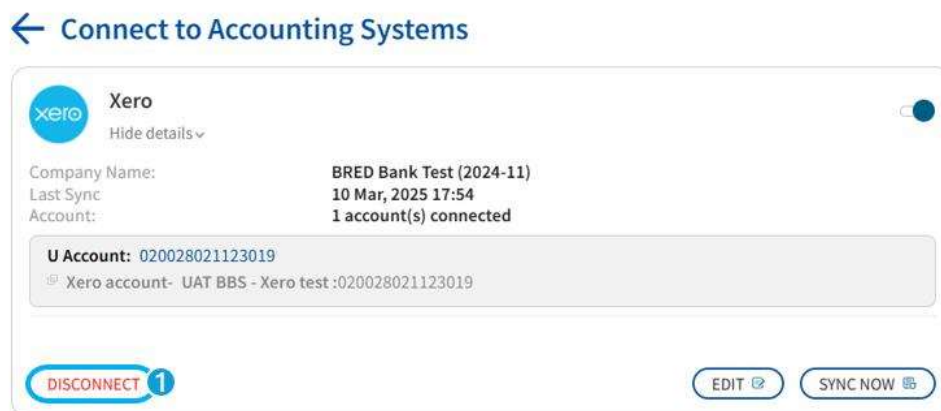
BACK

SUBMIT

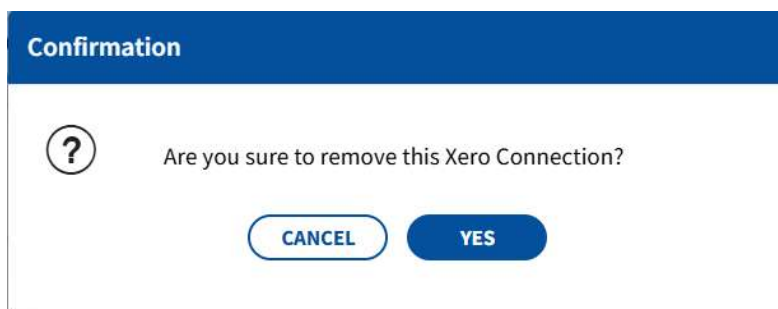
5. Connector creation request will would be created which will go through an **authorization process**, as per authorization rules defined

How to disconnect Xero connector

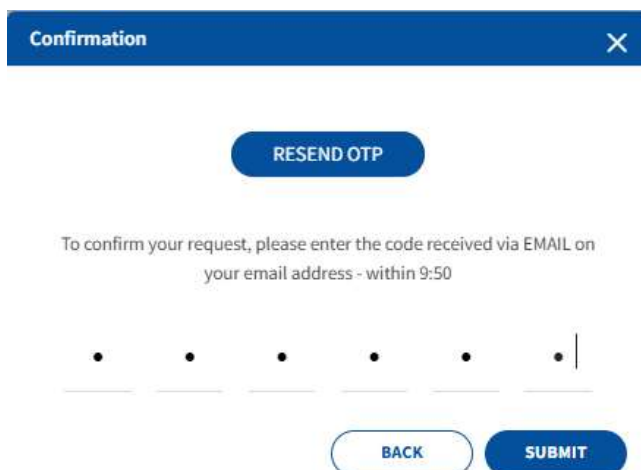
You are also able to remove a Xero connector via BRED BUSINESS CONNECT by disconnect the connector.



1. Click on **Disconnect** at bottom left.
2. Confirmation will pop-up.



3. Click **Yes**, to confirm. **No** to cancel a disable.
4. Enter **OTP**.



5. Connector creation request will be created which will go through an **authorization process**, as per authorization rules defined.

