Associate an Emersion Account with a Xero Contact

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Overview

This article covers how users can associate an Emersion account with a pre-existing contact in Xero. This can be done at the point of creating the account in Emersion, or after the account has been created. This is useful when a service provider has been using Emersion for some time and then subscribes to the Xero Integration at a later date.

If you are looking for how to create a Xero contact from within Emersion, please see this article.

See this page to see what data is transferred from Emersion to Xero during this process.

Do not update account information in Xero once a link has been established. Any changes made in Xero to a Xero contact will not be pushed back to Emersion.

- If a Xero Contact is already associated to an Emersion Account, you will not be able to link it to any other account before disassociating it from that account.

- In Xero, a Contact can be classified as a "Supplier" (ie. has an Accounts Payable Invoice (bill) issued), a "Customer" (ie. has an Accounts Receivable invoice issued) OR both.

Only Xero Contacts that are classified a "Customer" can be linked to an Emersion Account.

Associate a Contact from Xero When Creating the Emersion Account

Users can automatically associate a Xero contact while creating an Emersion account on the first page of the create account wizard.

Customers > Create New Customer

On the *Integration Settings* page, users will see two fields related to linking or creating Xero contacts. Choose one of these options.

- If the user wants to create the contact in Xero automatically, tick the box for the **Create Xero Contact?** field.
- If the user wants to associate the Emersion account with an existing contact in Xero, press the **Refresh Xero Contacts List** button, then double-click in the field to see the list of contacts and choose the contact to link. Only Xero contacts with no associated Emersion account will appear in the list.

Continue the remaining sections of the create account wizard and complete it. Upon completion, the account moves from a *Preactive* status to an *Active* status and the account information is pushed to Xero to create a contact.

In the event a user forgets to link the account with a Xero contact, continue to finish the wizard and create the association later.

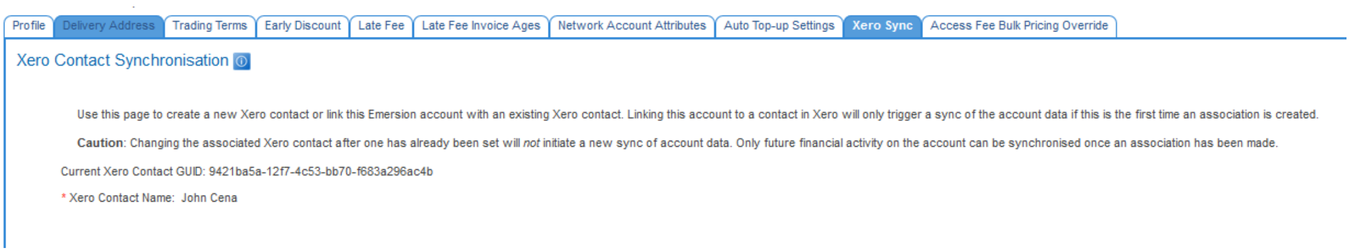
Associate the Contact from Xero After Creating the Emersion Account

If an account has been created in Emersion, users can link it with a Xero contact which will sync the data.

Customer > Details > Xero Sync

1. Click the Edit button to put the page into EDIT mode.
2. Press the **Refresh Xero Contacts List** button, then double-click in the field to see the list of contacts and choose the contact to link.
3. **Save** the changes.

Upon saving, the contact will be created in Xero. When the page is refreshed, the name of the Xero contact will appear next to the Xero contact name field as shown below.



Troubleshooting Contact Creation

When electing to "Create Contact in Xero", you may encounter a scenario whereby the contact does not create and you won't be provided feedback about this. This can occur during **Customers > Create New Customer** or from an existing account via **Customer > Detail > Xero Sync**.

After you submit the request to create a new contact via the Xero Sync tab, you will see a notification stating "Xero Contact Name has been updated", however no visible Xero Account Name and GUI will display.

This usually means the API call failed for some reason and will need to be investigated by Emersion Support.

Related Pages

- Xero
- Using Groups to Migrate Customers from Xero to Emersion During Onboarding
- Configure Xero Integration
- Ledger Code Mapping Import
- Create an account in Xero from Emersion
- Xero Diagnostics
- Payments in Xero and Emersion do not match/reconcile
- Xero Integration Errors
- View Chart of Accounts in Cumulus
- Breaking the Xero and Emersion Link
- First Time Connect To Xero
- Sync Xero Data On Demand
- Xero Account Mapping Report
- Emersion to Xero Account Sync
- Account Profile Interactions With Xero