Troubleshooting Xero Issues

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Overview

This page contains a list of troubleshooting articles related to the Xero Integration module.

If you cannot resolve your issue using these articles, please create a support request with our Customer Service Team detailing what hasn't worked as expected. Please ensure you list any errors received especially if it relates to data being *pushed* to Xero *from* Emersion.

Users of the Xero Integration: Please read our Critical Information article to understand fully how to work with Emersion and Xero with our integration. This article is essential to mitigate the risks of causing damage to your data, causing a costly repair by Emersion staff.

In the event that data is left in an undesirable state or damaged *and the cause is deemed not to be a system fault*, you will be charged for Emersion to repair your data. This includes any repair work arising from:

- a lack of adherence to the critical rules and warnings in these articles.
- not following explicit instructions that are contained on this Knowledge Base.
- performing any activity in Xero that Emersion staff have explicitly stated you must not do whilst seeking technical support from Emersion (e.g. during phone support, ticket responses and any other correspondence).

How To Troubleshoot

Have you checked the Xero Diagnostics page? Go to this page first.

- You are then going to want to review the Xero Integration Errors screen in Cumulus to understand why invoices, credit notes, payments or payment allocations have not successfully pushed to Xero.
  Some errors will relate to **payments** and **payment allocations** (The Xero Integration Errors page will list these as an *Umbrella_LedgerJournal* object)
  Other errors will relate to **invoices** and **credit notes** (The Xero Integration Errors page will list these as an Umbrella_AccountInvoice object)
- Depending on the error, you can browse the below articles to see if we have a recommended fix available
- As some errors may be unknown to Emersion, you may wish to seek further assistance directly from Xero themselves. We recommend Xero Central as a starting point.

Summary of Supported Integration Objects

For more detail on the transaction flows below, see Transaction by Transaction Integration Examples.

Supported Transactions and Objects created in Emersion -> Xero		
	Emersion Element	*Xero equivalent after API Call*
	Account	Contact (new xero contacts can be created, or a link can be made to an existing contact)
	Approved Invoice	Invoice
	Invoices with a Credit Balance	Credit Note
	Payments	Overpayments Note: If the Payment is allocated to an invoice in Xero not sourced from Emersion, a refund ledger journal transaction will be created in Emersion.
	Unsupported Transactions	
	Account Level Refunds	
	Account Level Write Offs	

	Ledger Journal Transactions relating to transfer to and from Agent Accounts	
	Payment Reversals in Emersion.	
	Voiding of Payments in Emersion.	
	Refunds of Individual Payments in Emersion.	
	Invoice Unapproval	
	Payment reversals	
Supported Transactions and Objects created Xero -> Emersion		
	Xero Element	*Emersion Element*
	Payment applied to invoice sourced from Emersion	Payment
	OverPayment applied to invoice sourced from Emersion	Initially nothing will flow to Emersion, until the credit created from the overpayment in Xero is allocated to an Emersion sourced invoice. It will then show up as Payment in Emersion.
	Credit Notes (with credit applied to invoice sourced from Emersion)	Payment
	Prepayments	When a prepayment is allocated to an Emersion sourced invoice in Xero, it will flow to and become a payment in Emersion.

Troubleshooting Articles

- Allocation Journal is already pushed or locked by another process
- Customer data not being sent to Xero and back again
- Delete Or Void Xero Invoice
- Multiple Model References Found
- Payment or Credit Note Applied to Invoice Not Pulled Into Emersion
- Payments in Xero and Emersion do not match/reconcile
- Where is the Payment Surcharge?
- Xero Connection has Dropped
- Xero Period Lock Date Exists - Cannot Sync Data