i-mve Xero Integration – Support Documentation

This document provides guidance on how the i-mve platform integrates with Xero, including setup, configuration, supported features, limitations, and troubleshooting. It is intended for customers using i-mve with Xero and for Xero App Store review and support purposes.

1. Overview

i-mve is an all-in-one CRM and job management platform designed specifically for removals and storage businesses. The Xero integration allows customers to synchronise financial data between i-mve and Xero to reduce manual data entry, improve accuracy, and maintain real-time visibility of invoice and payment status.

The integration focuses on **invoice creation and synchronisation**, while keeping all accounting control and payment processing fully within Xero.

2. What the Xero Integration Does

The i-mve Xero integration supports the following:

- Secure connection between i-mve and a customer's Xero organisation
- Creation of invoices in Xero from i-mve jobs and storage sections
- Synchronisation of invoice status (e.g. draft, authorised, paid)
- Synchronisation of customer/contact data
- Selection and mapping of tax rates

3. What the Integration Does NOT Do

To ensure clarity and transparency, the following functionality is **not** handled by i-mve:

- i-mve does **not** process or collect payments
- i-mve does **not** post payments to Xero
- i-mve does **not** create spend or receive money transactions
- i-mve does **not** reconcile bank transactions

All payments are managed directly inside Xero using Xero's native workflows.

4. Connecting i-mve to Xero

4.1 Sign Up with Xero

The recommended way to connect is via the **Sign Up with Xero** flow from the Xero App Store listing.

Customers can also connect from within i-mve:

1. Log in to i-mve
2. Go to **Settings → Integrations → Xero**
3. Click **Connect to Xero**
4. Authorise access and select the correct Xero organisation

Once connected, the selected Xero organisation name is displayed in i-mve so users can confirm the correct organisation is linked.

5. Managing the Connection

Within the Xero integration settings, users can:

- View the connected Xero organisation name
- See the current connection status (Connected / Disconnected)
- Disconnect Xero at any time
- Reconnect if authorisation expires or access is revoked

If a connection becomes invalid (for example, disconnected from within Xero), i-mve detects this and prompts the user to reconnect.

6. Invoice Creation and Synchronisation

When an invoice is created in i-mve:

- The invoice is sent to Xero using the Xero Accounting API
- Line items, quantities, pricing, tax, and currency are included
- The invoice appears in Xero under the connected organisation

7. Tax Mapping

i-mve supports explicit tax configuration:

- Users select applicable tax rates within i-mve
- Selected tax rates are mapped to Xero tax types
- Tax values sent to Xero match the user's configuration

This prevents discrepancies between tax values in i-mve and Xero and supports regional tax compliance.

8. Error Handling and Notifications

If an error occurs during communication with Xero:

- User-friendly error messages returned by Xero are displayed in i-mve
- Errors are logged for troubleshooting and support
- Users are prompted to reconnect if the issue is related to authorisation or connectivity

This ensures users are always aware of issues and how to resolve them.

9. Security and Permissions

i-mve uses OAuth 2.0 to securely connect to Xero.

The integration requests **only the minimum required scopes**, including:

- Contact access
- Accounting settings
- Accounting transactions

Offline access is used to support background synchronisation while maintaining security best practices.

10. Disconnecting Xero

Users can disconnect Xero at any time from the integration settings.

When disconnected:

- No further data is sent to Xero
- Existing data in Xero remains unchanged
- Users can reconnect at any time by reauthorising access

11. Support

For help with the i-mve Xero integration:

- In-app support is available within i-mve
- Customers can contact the i-mve support team for assistance

When contacting support, users should provide:

- Their i-mve account email
- The connected Xero organisation name
- A brief description of the issue

12. Changes and Updates

i-mve may enhance or extend the Xero integration over time. Any changes will follow Xero's platform guidelines and certification requirements.