



INTERFY



USER GUIDE: CREATING A DIRECT COST FROM A XERO BILL

- » Instructions for how to create a Procore direct cost from a Xero bill

Our integration partners



PROCORE





Document Control

Document Stage

APPROVED

Document Version

1.1

Document Last Updated

10 September 2019 by Karen Farrugia



1. From Xero, open **Business>Bills to pay**.

Business Accounting

Invoices

Quotes

Sales overview

Bills to pay

Purchase orders

2. Click on **New Bill**.

Bills

New Bill New Credit Note Import Export

3. Select a vendor, due date, and enter a reference number.

New Bill

From Date Due Date Reference

TCC Company 29 Aug 2019 5 Sep 2019 TCC|

4. Enter the description, quantity, unit price, cost code account, project and cost type.

From Date Due Date Reference Total

TCC Company 29 Aug 2019 5 Sep 2019 TCC 0.00

Amounts are Tax Inclusive

Item	Description	Qty	Unit Price	Account	Tax Rate	Project	Cost Ty...	Amount AUD	
::	Wood Materials	1.00	500.00	11-06-050 - Wood Materials	GST on Expenses	PTX11001	Materials	500.00	×
::									×
::									×
::									×
::									×

Add a new line Assign expenses to a customer

Subtotal 500.00
Includes GST 10.00% 45.45
TOTAL 500.00



5. Click on **Approve** once complete.

From	Date	Due Date	Reference	Total
TCC Company	29 Aug 2019	5 Sep 2019	TCC	0.00

Amounts are Tax Inclusive

Item	Description	Qty	Unit Price	Account	Tax Rate	Project	Cost Ty...	Amount AUD
::	Wood Materials	1.00	500.00	11-06-050 - Wood Materials	GST on Expenses	PTX1001	Materials	500.00
::								
::								
::								

Subtotal 500.00
Includes GST 10.00% 45.45
TOTAL 500.00

Buttons: Save, Approve, Cancel

6. From Procure, select the project from the drop-down menu.

Interfy Demo Account
Select a Project

Company Tools
Portfolio

PO Search Portfolio... My Open Items

7. From Available Project Tools select **Direct Costs** to view the invoice.

Interfy Demo Account
1001 - Procure to Xero In...

Available Project Tools
Commitments

Core Tools: Home, Reports, Documents, Directory

Project Management: Emails, Tenders, RFIs (+), Submittals (+)

Quality & Safety: Inspections, Incidents, Observations (+), Defect List (+)

Construction Financials: Head Contract, Budget, **Direct Costs**

DIRECT COSTS Summary Summary By Cost Code

SUMMARY

	Date	Vendor	Type	Invoice #	Status	Amount	Received Date	Paid Date
View	29/08/19	Bunnings	Invoice	DC-BUNNINGS-2908A	Approved	\$136.36	29/08/19	29/08/19
View	29/08/19	TCC Company	Invoice	TCC	Approved	\$454.55	29/08/19	