

Connecting Xero Practice Manager & Importing Jobs

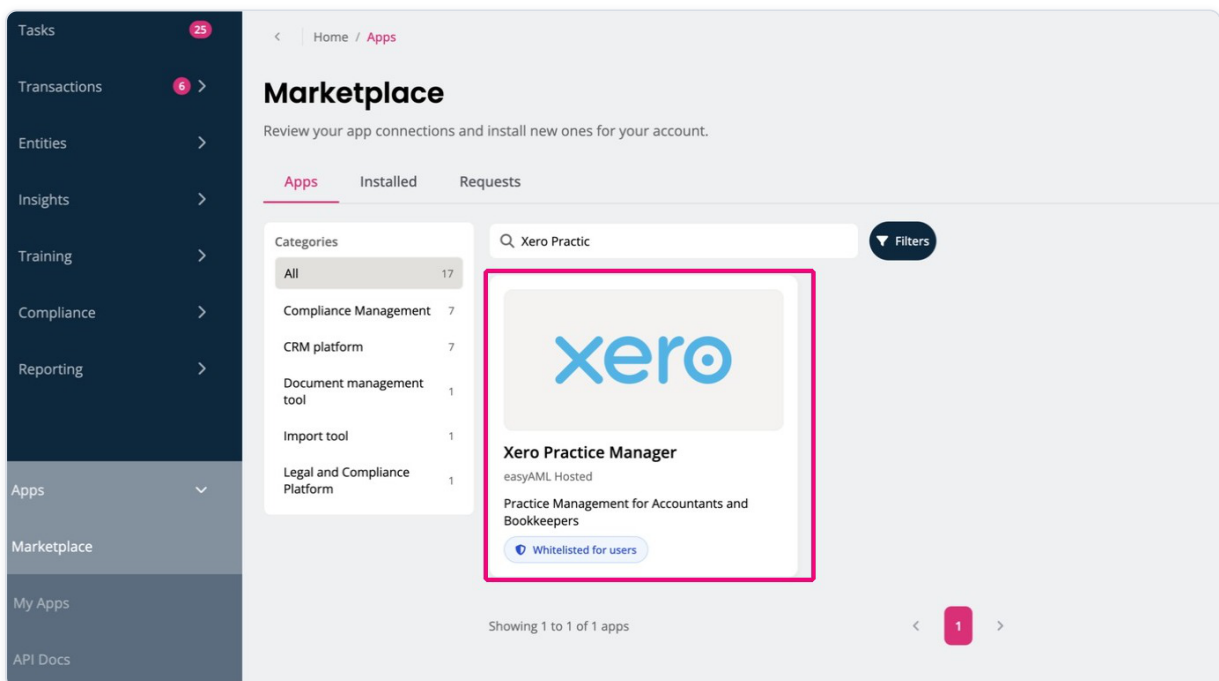
INT-02 · Version 1.1

Connect easyAML to Xero Practice Manager (XPM) once, then import XPM Jobs as easyAML transactions — with links maintained in both directions between the transaction and the Job.

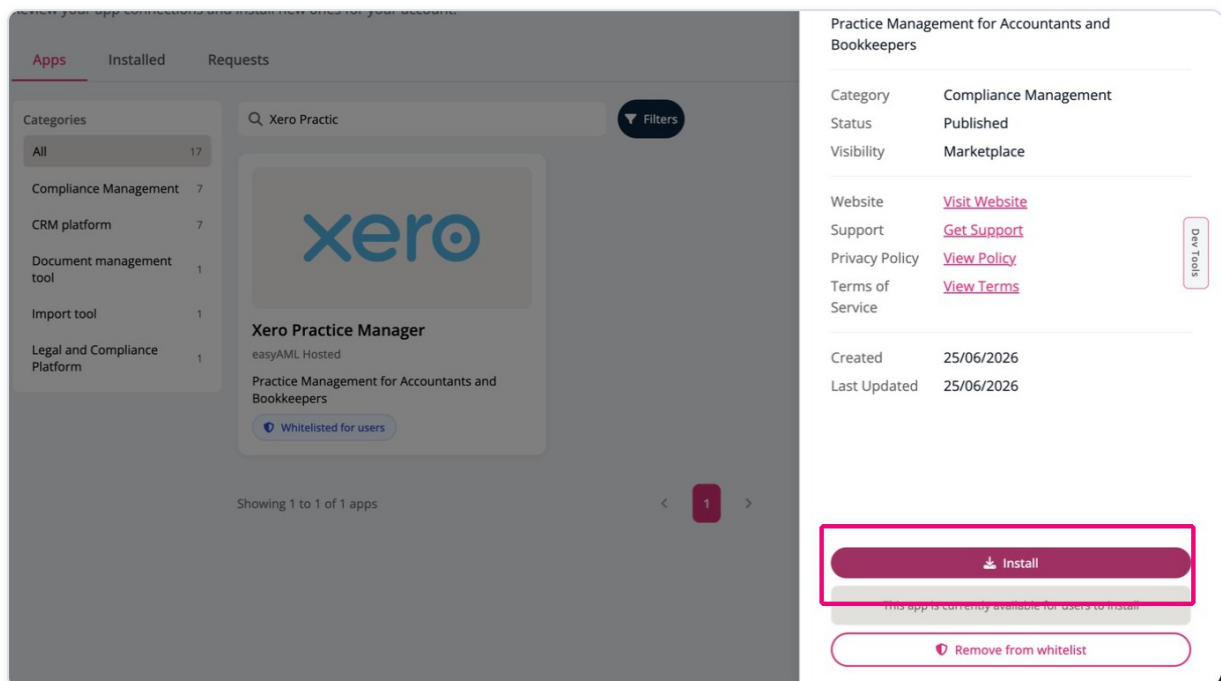
OPEN TO START <https://app.easyaml.com/apps>

Connect XPM

- 1 Select **Apps** in the sidebar, open the **Marketplace**, and search for **Xero Practice Manager**.

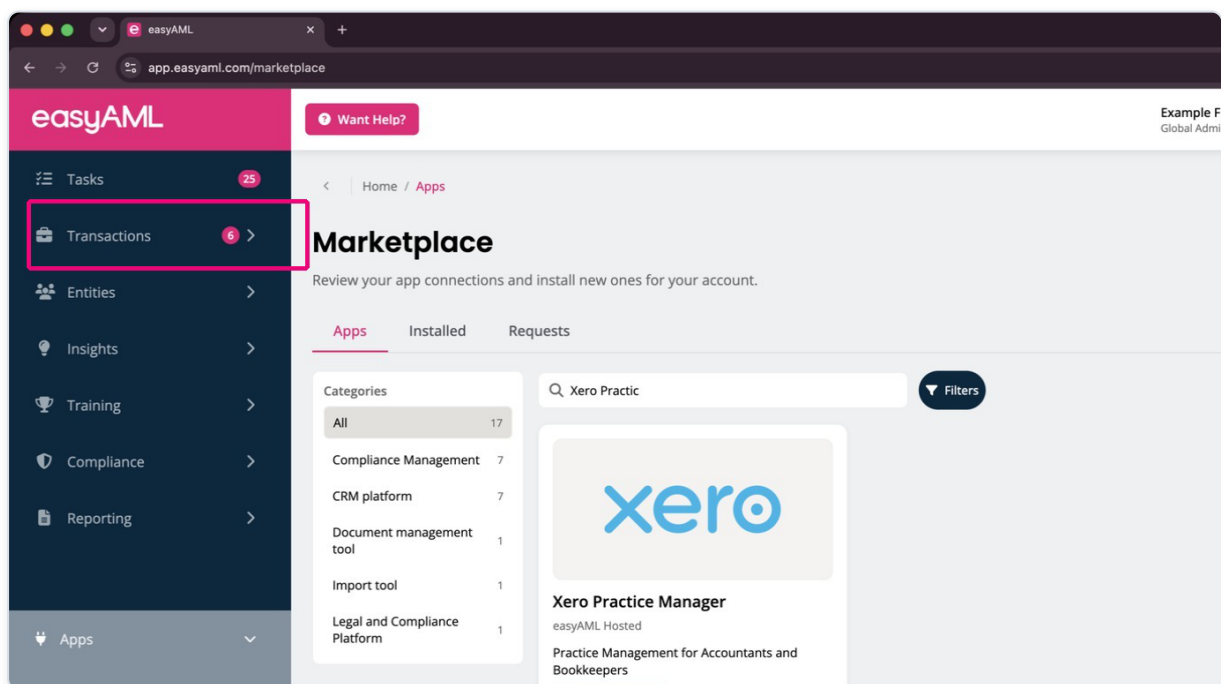


- 2 Click **Install**, then **Authorise**. A Xero login popup appears — sign in and click **Allow access**.

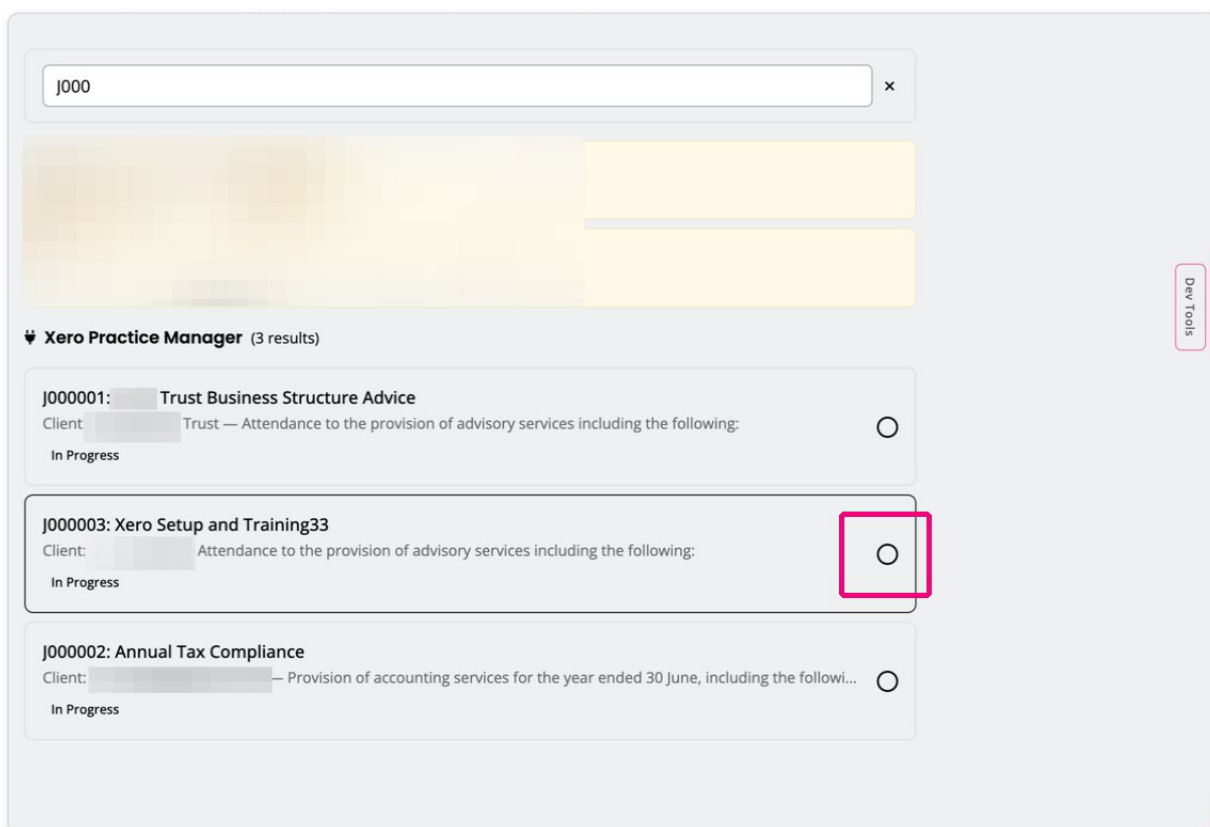
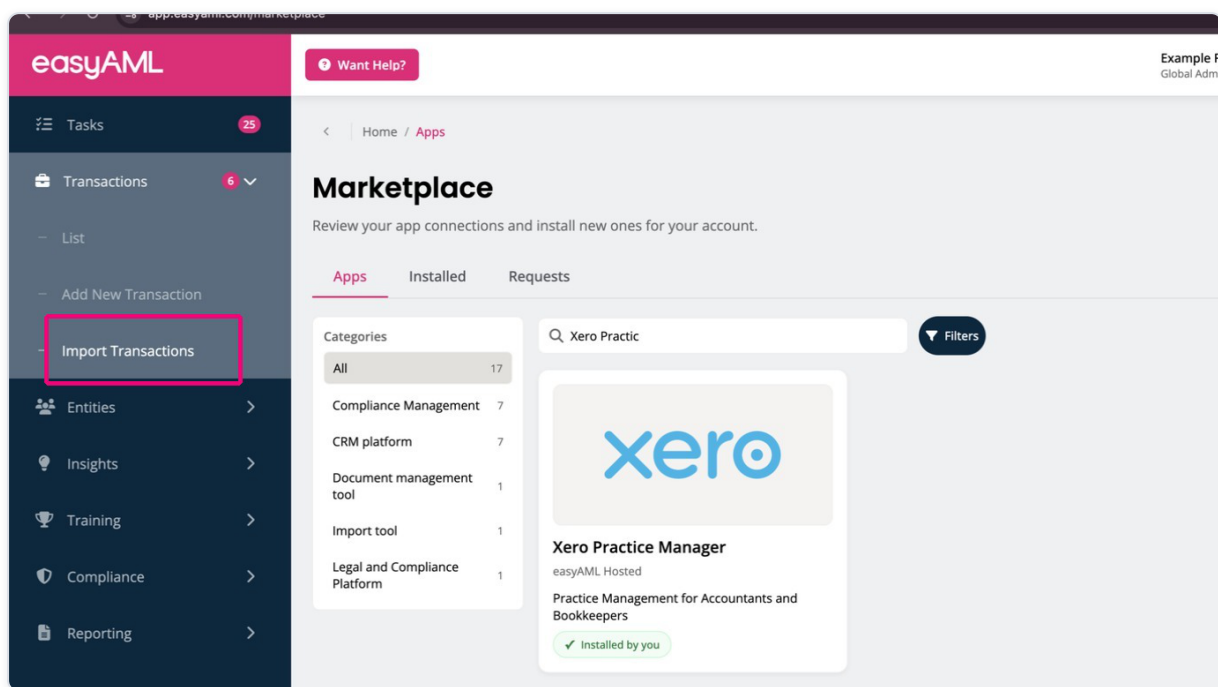


Import an XPM Job as a transaction

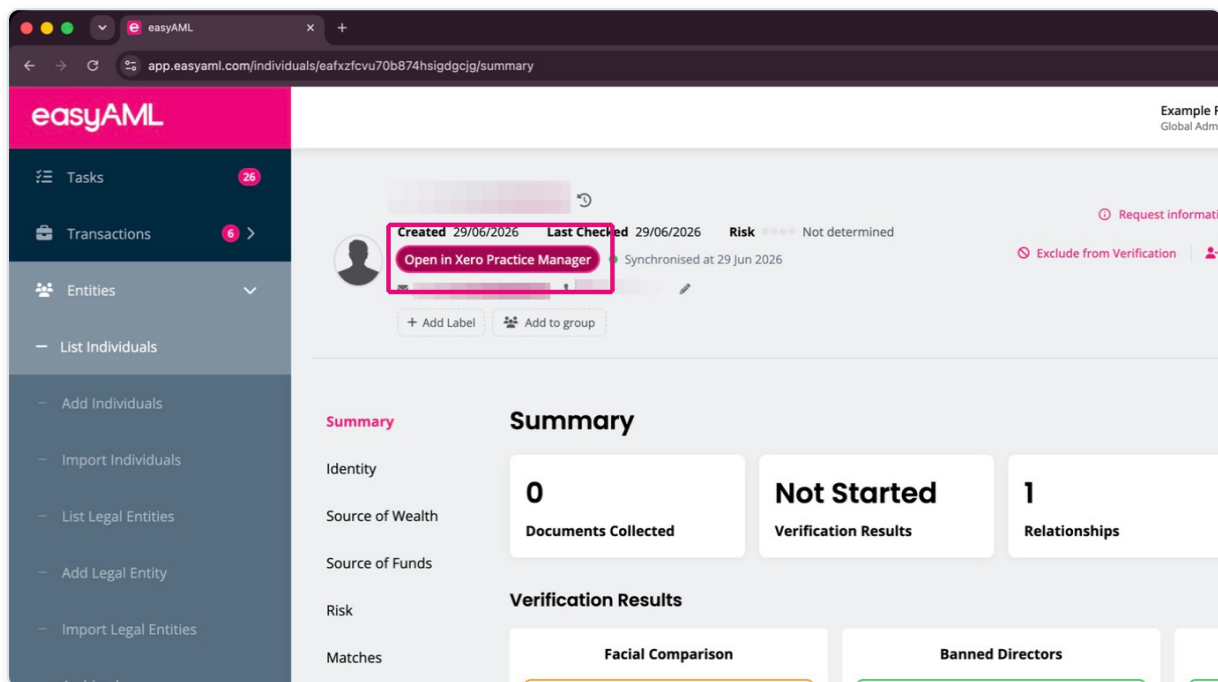
- 1 Go to **Transactions** and click **Import Transactions**.



- 2 Search for the XPM Job by **Job Number or Job Name**, select the result, and click **Import transaction**.



- 3 The client is imported with the transaction. Open them from the individuals list — a **link back to the XPM contact** is created automatically; the transaction likewise carries a link that opens XPM at the connected Job.



More ways to get help

- **In-platform:** the “Want Help?” button on each page opens the relevant walkthrough.
- **Knowledge Base:** <https://knowledge.easyaml.com/what-platforms-does-easyaml-integrate>
- **Video walkthrough:**
https://scribeshow.com/o/PKpOki2kThyzGwDRLEXASw/viewer/How_to_Connect_easyAML_to_Xero_Practice_Manager_and_import_Jobs_d4784947