

Contacts in Xero

Introduction

Xero stores all contact details for both customers and suppliers in the same record.

All contacts are available for sales and purchases as needed – when an invoice or bill has been recorded in Xero the relevant contact is included in the Customers or Suppliers heading in the Contacts list.

Add Contacts

From the **main menu** select **Contacts > All Contacts**

Several types of information can be added as detailed below

Contact Details

- **Contact** is the business name or the name as it will appear on the invoice
- **Contact Person** is optional – enter the email address if available
- In **Find Address** start typing the address – Xero will attempt to find the street name etc and enter them in the relevant fields
- Note that the **Postal Address** is shown on invoices – the Physical Address is optional
- Enter telephone numbers, etc. as needed.

Tax Details

- Enter the supplier's ABN and default tax codes as needed

Batch Payments

When suppliers will be paid by batch payments via an ABA file to your bank, enter the following details:-

- Bank Account **Number** - BSB and account numbers. As an example, we suggest that BSB 123-456 Account Number 3456789 be entered as 123-456 3456789
- Bank Account **Name** – the name of the supplier's bank account
- **Details** – the default text to be shown on the supplier's bank statement – e.g. your business name

Invoice Settings

Default Invoice Branding – if you have multiple invoice templates select the relevant one for this customer

Default **Due Dates** – when you enter these Xero will calculate the due date when entering invoices and bills

Save the Contact Details

Click **Save** to save the contact details – you may need to scroll down to see the Save button.

Merge Contacts

Contacts can be merged to consolidate duplicated contacts as follows:-

- 1 Tick contact to be merged (i.e. archived)
- 2 Click **Merge**
- 3 Locate the contact that is to remain and confirm the action
 - a. Any transactions from the merged contact are moved to the remaining contact
 - b. the merged contact is moved to the **Archive** list– these contacts can be restored but all transaction links remain unchanged

Contact Groups

Contacts with similar characteristics can be grouped together by creating a Group.

Once created, Group names are shown in the Contacts menu (below Suppliers, separated by a horizontal line) and also in the Contacts List. Contacts can be members of multiple Groups

To add contacts to a Group:-

1. Display the **Contacts List**
2. Tick the check boxes for the contacts to be included in a Group
3. Click **Add to Group** (middle left)
4. Xero prompts you to select an existing Group or add a new one

To Delete a Group

- 1 Click **Delete Group** (middle right) – only shown when there are Groups
- 2 Xero prompts you to select the Group to be deleted (the Contacts remain unchanged)