

## FAQ

# Deputy & Xero 2.0 Integration



## How do I connect my Deputy and Xero accounts?

Please refer to our help docs [here](#) to start the integration process

## Can I connect my accounts if I am already using Deputy and Xero separately?

Yes, we have built this integration to be flexible enough for you to turn it on at any point in your Deputy and Xero journey. To ensure you don't duplicate efforts of data entry, you can choose which system you manage your employee information from, either Deputy or Xero, and be comfortable knowing that the information will appear in both systems automatically.

## What data is synced between Xero & Deputy?

If you choose to enable "Auto Sync Employee" in Deputy, the following information will be shared between Deputy & Xero:

### *Basic Details*

- First name + Last name
- Email
- Mobile Number
- Address (Default for empty)
- Date of birth
- Gender

### *Employment Details*

- Hire date
- Payroll Calendar (First entry on Xero's payroll calendar list)
- NI Category (Options: A,J,X ; Default value we use: A)
- Employee Number (Deputy employee ID)

If you choose to turn on "Xero Pay Templates" Deputy will automatically pull salary, wages base pay and pay template entries from Xero and set it as the employee's new pay rate in Deputy.

### **Is the sync 2-way?**

There are two stages in the process for auto syncing employee and pay rate information - creating the sync and updating the sync.

If you turn on "Auto Sync Employee", when you create the sync and

- The employee is only in Xero & not in Deputy, we sync the information from Xero into Deputy
- The employee is only in Deputy & not in Xero, we sync the information from Deputy into Xero
- The employee exists in both Deputy & Xero, we sync employee details using Deputy as the source of truth

If you turn on "Xero Pay Templates", the source of truth is Xero, meaning we pull the information from Xero into Deputy. If you don't choose to turn on "Xero Pay Templates" the source of truth will be Deputy and Deputy data will push to Xero.

During employee detail updates, Deputy is always the source of truth. For pay rates: You can choose either Xero or Deputy to be the source of truth.

### **If my auto sync is turned off, what information will be shared between Xero & Deputy?**

Nothing, all sharing of data between the platforms will require a manual process.

### **Can I track and see Annual Leave balances in both platforms?**

Yes - Annual leave is kept up to date across Deputy & Xero as long as employee syncing is enabled

### **Will Deputy recognise my complex Xero pay rates including overtime rates for Hourly and Salaried staff?**

Yes - If you choose Xero as the source of truth for your pay rates

### **What happens if an employee changes their email address in Deputy?**

Deputy is always the source of truth for ongoing updates of employee details, so as long as the email address changes in Deputy, it will be updated in Xero automatically. If it gets updated in Xero, you will need to manually update it in Deputy as well.

### I have discarded or deleted an employee from Xero, will this be reflected in Deputy and if auto sync is turned on, what will happen?

If the employee sync is already turned on between Xero & Deputy, you will need to manually discard or delete this employee in both platforms. If auto sync is not turned on, again, you will have to manually discard or delete from both platforms.

### If/when a timesheet export fails, how do I know what caused the issue?

You will get a detailed error message in Deputy during export (a dialogue box will appear)

### I choose to manage my pay rates in Xero, how do I ensure that Deputy pay rate information won't overwrite the Xero pay rate during timesheet export?

Simply choose Xero as the source of truth during integration set up to ensure that Deputy doesn't overwrite any pay rate information in Xero:

**Xero**

CONNECTED WITH DEPUTY TEST (UK-2019-02)

**Auto Sync Employee**  
Automatically sync details for those employees who work in this location with the connected third party payroll system.

**Xero Pay Templates**  
Employees in this location will only use Xero pay templates.

Disconnect

ON

OFF

Above: Simply toggle 'Xero Pay Templates' on if you want Xero to be the source of truth for all employee pay rates

### I choose to manage my pay rates in Deputy, how do I ensure that Xero pay rate information won't overwrite the Deputy pay rate during timesheet export?

Simply choose Deputy as the source of truth during integration set up:

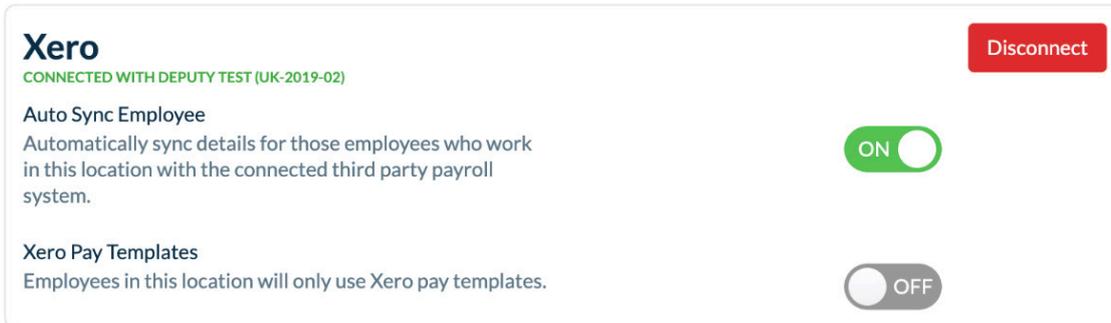
**Xero Pay Templates**  
Employees in this location will only use Xero pay templates.

OFF

Above: Simply toggle off if you want Deputy to be the source of truth for all employee pay rates

## How do I get the pay rates I have set up in Xero to sync with Deputy during an employee sync?

Simply ensure that Xero Pay Templates is enabled in Deputy.



**Xero** Disconnect  
CONNECTED WITH DEPUTY TEST (UK-2019-02)

**Auto Sync Employee**  
Automatically sync details for those employees who work in this location with the connected third party payroll system. ON

**Xero Pay Templates**  
Employees in this location will only use Xero pay templates. OFF

Above: Simply toggle on if you want Xero to be the source of truth for all employee pay rates

## Will I get a notification if an employee record fails to sync? Where will I see this notification?

The system manager will receive a notification in the global notification on the main navigation bar in Deputy stating the reason for the failure.

## What happens if no gender or "rather not say" is selected in Deputy, how will that be reflected in Xero?

The sync will fail every time you sync the employee. You will only see a choice to set up employees as male or female in Xero.

## I record my leave in days in Deputy, but Xero only records in hours. How can I be sure that it will appear correctly synced between the two platforms?

Deputy will convert leave balance from days to hours when sending the information to Xero and will convert the hours to days when the leave balance appears back in Deputy.

## What if I only want to sync certain employees with Xero?

With this version you can choose to either sync all employees from Deputy or all employees from Xero. If you have a requirement to only sync certain employee records, let us know so we can add it to our feature request.

## I want to manage complex area based pay, how do I do this from Deputy?

If you want to do complex area based pay for some employees, follow these [guidelines](#)

**I seem to be getting an incorrect leave balance for my employees when I switch between hours and days, why?**

When switching from hours to days, we temporarily show 0 days balance until next sync. Sync occurs every 15 mins.

**Why is my leave balance not displaying on the People tab in Deputy?**

Leave balance does not display on People tab if it's using Xero rate, even if there is a leave balance (if you look at the employee's profile view)

**The sync time seems long when syncing my employees**

Due to a limitation on our API, the first time you set up the Xero integration it can take extended periods of time for all employees to show up in Deputy, this is particularly apparent for businesses with more than 11 employees.