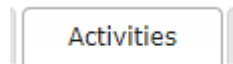


HOW TO ADD A DEFAULT LINE ITEM FOR AN ACTIVITY

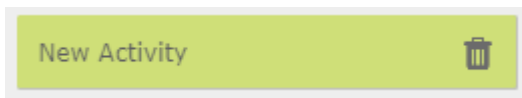
Adding a default line item for an activity is one of the first steps for integrating your TracMap Online account with Xero.



1. Open up TracMap Online and navigate to the "ADMIN" tab.




2. From the sub tabs select "Activities".



3. Select the activity you need to add a line item to.

XERO SETTINGS FOR NEW ACTIVITY

Add default line items for New Activity job invoices and choose what information is prefilled in those lines.

New default line item 

4. In the column to the right scroll down and you should see an option to "New default line item". Click on "New default line item" to add one.

XERO SETTINGS FOR NEW ACTIVITY

Add default line items for New Activity job invoices and choose what information is prefilled in those lines.

Item (Xero item code)

Select an Option 

Quantity (TracMap job field)

Select an Option 



5. An option will now pop up allowing you to select an Item code from Xero and what you would like the quantity based on in TracMap Online. Depending on what sort of activity it is depends on what you would like to charge off e.g nominal area, requested area, time working or even a custom field which could be set up.

HOW TO ADD A DEFAULT LINE ITEM FOR AN ACTIVITY


Invoicing in TracMap Online example

Create Invoice for TracMap Helpdesk from 1 Job ✕

To	Invoice Number	Reference	
<input type="text" value="Type to search Xero customer"/>	<input type="text" value="Xero default"/>	<input type="text" value="Optional"/>	<small>Click to see other options</small>

Item	Description	Quantity	Price excl. GST	Amount
<input type="text" value="SPR"/>	<input type="text" value="1804704 Spreading Spreading"/>	<input type="text" value="0"/> <small>Nominal Area (ha)</small>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Add line item				
EST. TOTAL (EXCL. GST)				0.00

Attach customer report

Once the job has been completed you will see an  option appear with your light blue buttons on the job details. Once you click on this the above image will appear, if you have set up your activity default line item correctly it should automatically appear (as above). In here you can still click in the “Quantity” box and change what you would like that line item to be charged off (as below).

<input type="text" value="0"/>	<input type="text" value="0.0"/>
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Requested Area	1157.36 ha
Nominal Area	0 ha
Real Area	0 ha
Distance Working	0 km
Distance Not Working	0 km
Row Length Requested	0 km
Row Length Treated	0 km