escalate
MANAGING COMMERCIAL DISPUTES

ESCALATE XERO APP
SUPPORT DOCUMENTATION

CONTENTS

WELCOME

SETTING UP ESCALATE WITH XERO

The Escalate App is available to access without charge at: https://escalatedisputes.azurewebsites.net/
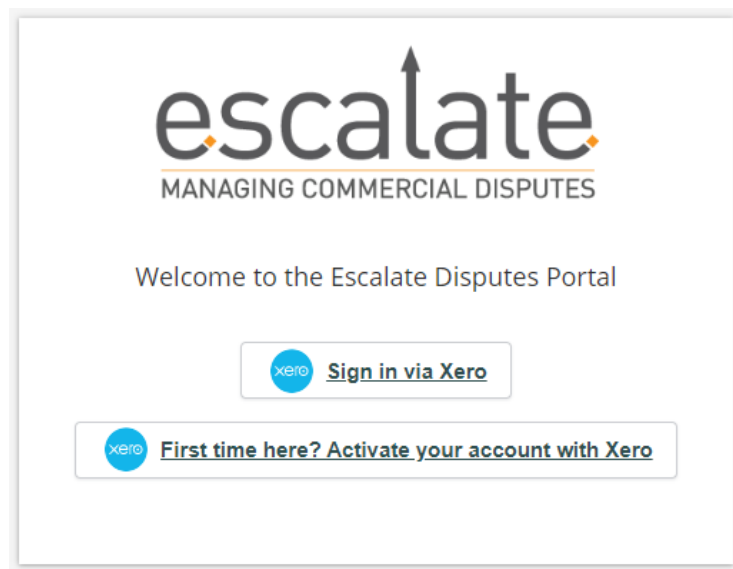
The Escalate App uses your existing Xero credentials to sign into your Xero account(s).
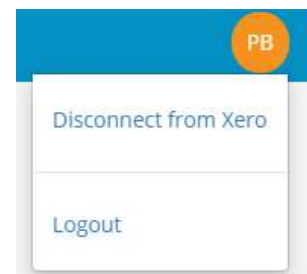
- The first time you access the App, you'll need to activate your account:
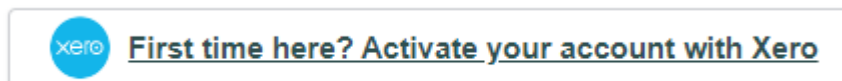
- Once activated, you can sign in with the 'Sign in via Xero' option:


After signing in, you can disconnect from a Xero account or Logout completely with the options at the top right. This will completely disconnect your session from the Xero Account.

DATA FLOW DIAGRAM

The Escalate App's main role is to provide the user with a read-only view of their overdue invoices. These can then be filtered to enable the user to decide if they want to use the Escalate service to recover overdue money.
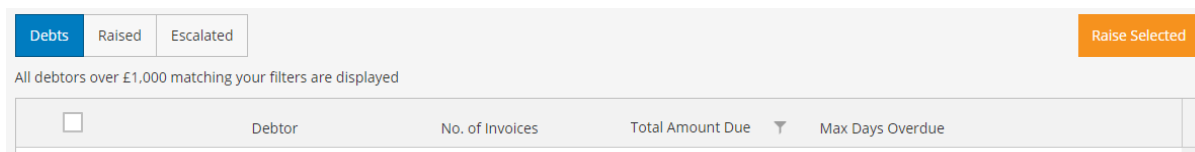
Data is written back to Xero should an invoice be 'Raised' (flagged for potential use of Escalate) or 'Escalated'. This is done in the form of a note on the invoice to inform other Xero users.
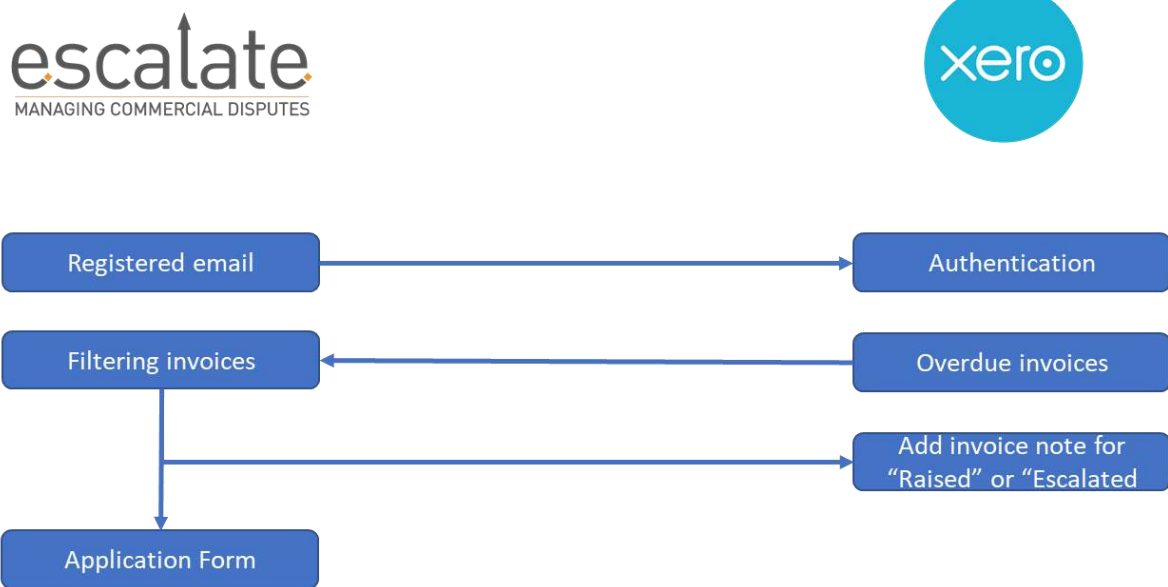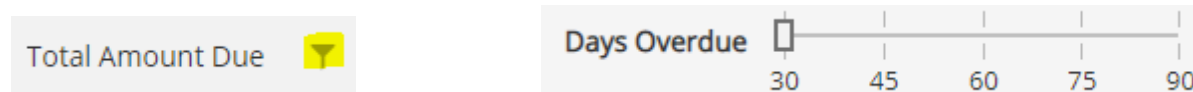

The only data stored by Escalate is the registered email address and any application form (used solely for the purposes of processing the specific request).

GETTING STARTED

Once signed into you Xero Account, you will be presented with a list of overdue debts totalling over £1,000 per vender.

These can be filtered by either the amount or the 'Days Overdue' slider:

You then have the option to either 'Raise' or 'Escalate' an overdue debt.
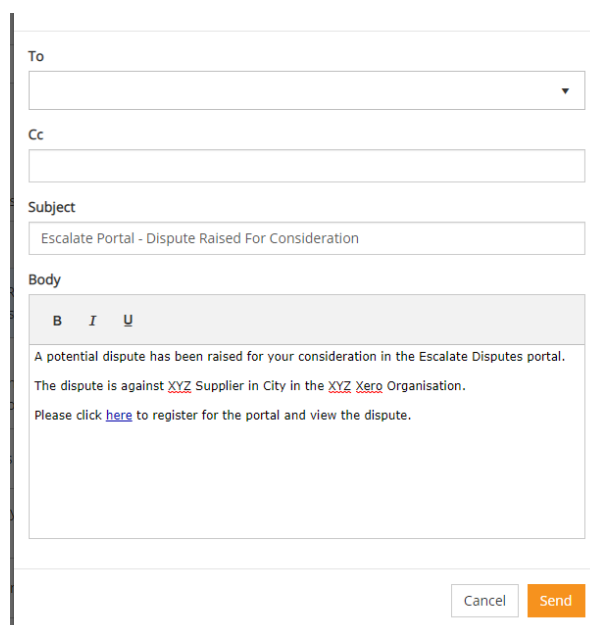
Raise

To 'Raise' an item, select the relevant checkbox and press the orange 'Raise Selected' button.

The 'Raise' option brings a debt to the attention of another person, to raise the possibility of using the Escalate service to recover the amount. This is done by sending a message:

- Only valid standard Xero accounts with access to the account will be listed in the 'To' dropdown;
- Default text will be displayed in the body of the message; this can be overwritten as required.

To view a list of all items that have been 'Raised', select the 'Raised' option in the top tabs.

Escalate

'Escalating' an item displays a form to start the Escalate process. This online form is sent to the Escalate team to enable us to follow this up with you.

FREQUENTLY ASKED QUESTIONS

Q. Not all debts show up. Why is this?

A. We only display Invoices above £1,000

Q. I can't see my Xero account. What's gone wrong?

A. The Excalate App requires Standard User access as a minimum; a read-only account is not sufficient as the App adds a note to invoices that have been 'Raised' or 'Escalated'

Q. How can I switch between my Xero accounts?

A. The dropdown at the top left displays all Xero accounts the user has permission to view

Q. How do I disconnect?

A. Select your initials at the top right and select the 'Disconnect' option

Q. What does the 'Force Refresh' option do?

A. The 'Force Refresh" button at the top right will update all on-screen information from the Xero account

Q. What data is stored by Escalate?

A. The only data stored by Escalate is the registered email address and contents of the application form to process the request