



ESCALATE XERO APP SUPPORT DOCUMENTATION

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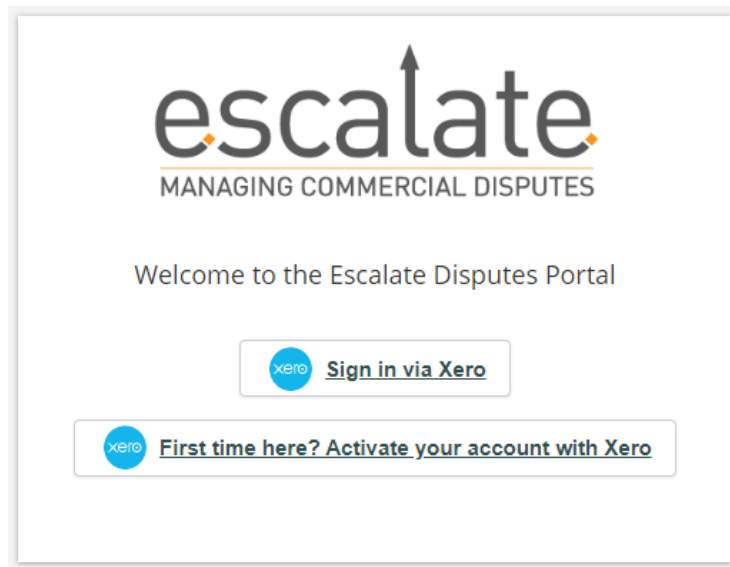
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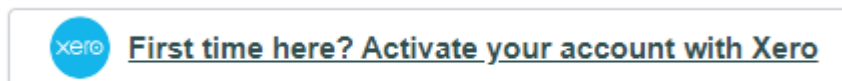
SETTING UP ESCALATE WITH XERO

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).

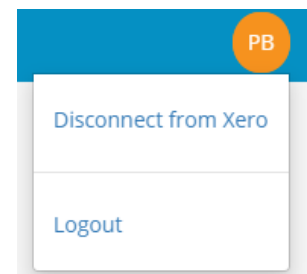
- The first time you access the App, you'll need to activate your account:



- 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 your Xero Account, you will be presented with a list of overdue debts totalling over £1,000 per vendor.

The screenshot shows a web interface with three tabs: 'Debts', 'Raised', and 'Escalated'. The 'Debts' tab is active. Below the tabs, there is a message: 'All debtors over £1,000 matching your filters are displayed'. Below this is a table with columns: 'Debtor', 'No. of Invoices', 'Total Amount Due', and 'Max Days Overdue'. A checkbox is visible in the first row. In the top right corner, there is an orange button labeled 'Raise Selected'.

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

The image shows two filter controls. On the left is a 'Total Amount Due' filter with a yellow funnel icon. On the right is a 'Days Overdue' slider with a range from 30 to 90 days, with intermediate markers at 45, 60, and 75.

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.

The screenshot shows an email composition form. It has fields for 'To' (a dropdown menu), 'Cc', and 'Subject'. The 'Subject' field contains the text 'Escalate Portal - Dispute Raised For Consideration'. Below these fields is a 'Body' section with a rich text editor containing the following text: 'A potential dispute has been raised for your consideration in the Escalate Disputes portal. The dispute is against XYZ Supplier in City in the XYZ Xero Organisation. Please click [here](#) to register for the portal and view the dispute.' At the bottom right of the form are 'Cancel' and 'Send' buttons.

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 Escalate 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