DEEP SPACE®

# Setting up Xero with Deep Space

Help guide · Finance Integrations

## What this feature does

Deep Space pushes your commercial activity (progress claims, subcontractor claims and bills, purchase orders) into Xero as bills and invoices. This guide covers how you control the way those lines are coded when they land, so your Xero profit and loss reads the way your accountant wants it.

There are three settings, all on one page:

- **GL Account Mapping** decides which Xero account each cost line hits. You choose one of two modes: map by cost code, or map by cost type.
- **Project to Tracking Category Mapping (TC1)** tags every line with its project, so you get a per-project P&L in Xero.
- **Second Tracking Category (TC2)** adds an optional second tag to every line, so you can also split the P&L by cost type or by department (region or business unit).

Set these once when you connect Xero, and everything Deep Space sends from then on is coded automatically.

## When to use it

- When you first connect Xero to a workspace and want your P&L split correctly from day one.
- When you want a cost-type P&L in Xero (Labour vs Materials vs Subcontract) without building it with journals.
- When you run several regions or business units under one Xero organisation and want a per-region P&L.
- When your Xero chart of accounts or reporting needs change and you want to re-point the mapping.

## Before you start

- Xero must be connected to the workspace. **[needs verification: exact connect steps]**
- You need permission to edit Finance Integrations (typically an admin or finance role). **[needs verification]**
- Your cost types and cost codes should already be set up in Admin, Finance, Cost Types. GL cost-type mode reads that cost-code-to-cost-type matrix, so it needs to exist.
- Decide your setup before you start (see the decision guide in Step 2). Your GL mode and your TC2 choice are the real decision.
- Create the tracking categories you plan to use on the Xero side first. Deep Space maps to options that already exist in Xero.

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# Step-by-step guide

## Step 1. Open Finance Integrations

Go to the Xero configuration page (Finance Integrations) and make sure you are on the Xero tab, marked Active.

You will see three sections down the page: GL Account Mapping, Project to Tracking Category Mapping, and Second Tracking Category (TC2).

## Step 2. Decide your mapping

TC1 is always your Project, so the real decision is your GL mode plus your TC2 choice. They pair up like this:

- **Recommended default: GL Map by Cost Code, plus TC2 Cost Type.** Detail in the accounts, cost type as the rollup for slicing. Best when you keep a cost code table and your Xero has a good spread of direct-cost accounts.
- **GL Map by Cost Type, plus TC2 Department.** Best when you would rather not maintain a cost code table and you run multiple regions or business units in one Xero organisation.
- **GL Map by Cost Type, plus TC2 None.** Best when you would rather not maintain the table and run a single entity.

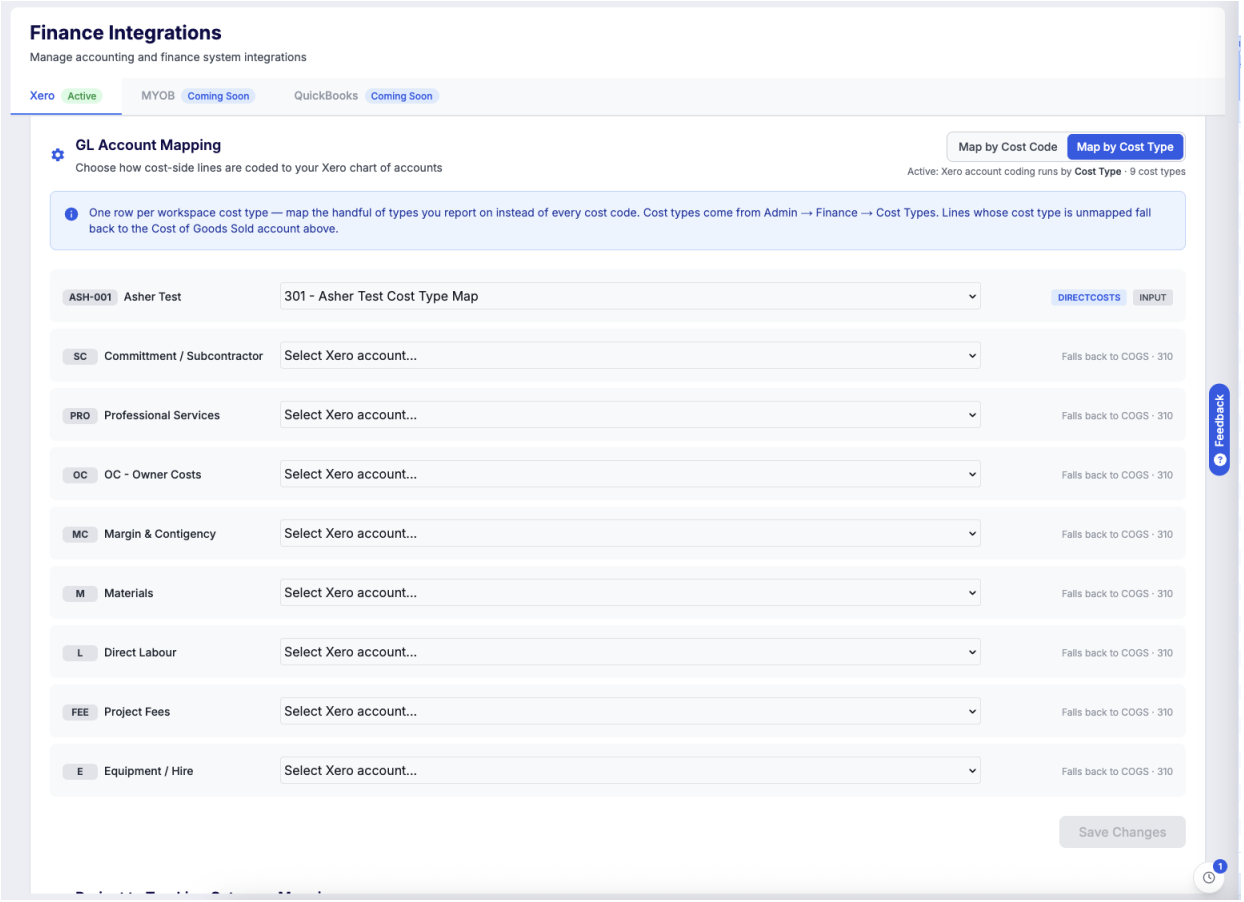
Pick from the shape of your Xero chart of accounts. If your accounts already split cost the way your cost types do (for example separate materials and subcontractor accounts), Cost Type mode gets you there without hand-mapping a long code list. If you run many direct-cost accounts and someone will keep the cost code table current, Cost Code mode earns its keep.

One combination to skip: GL Cost Type together with TC2 Cost Type. The account already is the cost type, so repeating it on TC2 adds nothing.

**The one constraint to plan around:** Xero allows two tracking categories per line, and TC1 is always Project. That means TC2 is a one-shot choice. You get a cost-type P&L or a regional one, not both.

## Step 3. Set the GL Account Mapping mode

In the GL Account Mapping section, use the switch in the top right to choose Map by Cost Code or Map by Cost Type.



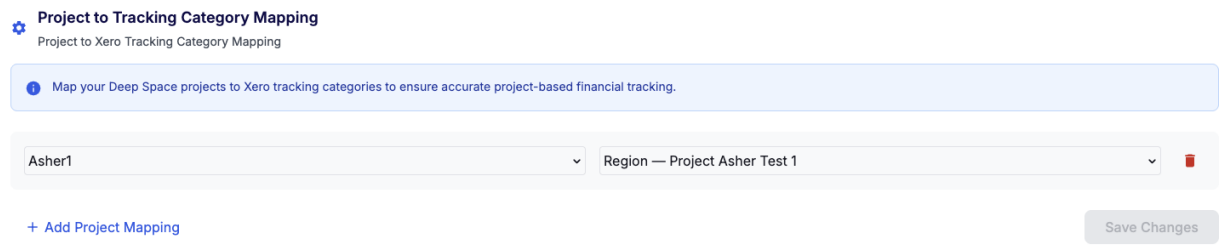

*GL Account Mapping in Map by Cost Type mode, showing the Map by Cost Code / Map by Cost Type switch.*

- **Map by Cost Code** keeps the familiar table of every cost code mapped to a Xero account.
- **Map by Cost Type** gives you one row per workspace cost type (Labour, Materials, Subcontract, Contingency and the rest), each mapped to a Xero account. Any line whose cost type is unmapped falls back to the Cost of Goods Sold default account shown at the top.

Switching modes never deletes the other mode's mappings, so you can move between them safely.

## Step 4. Confirm TC1 is mapped to Project

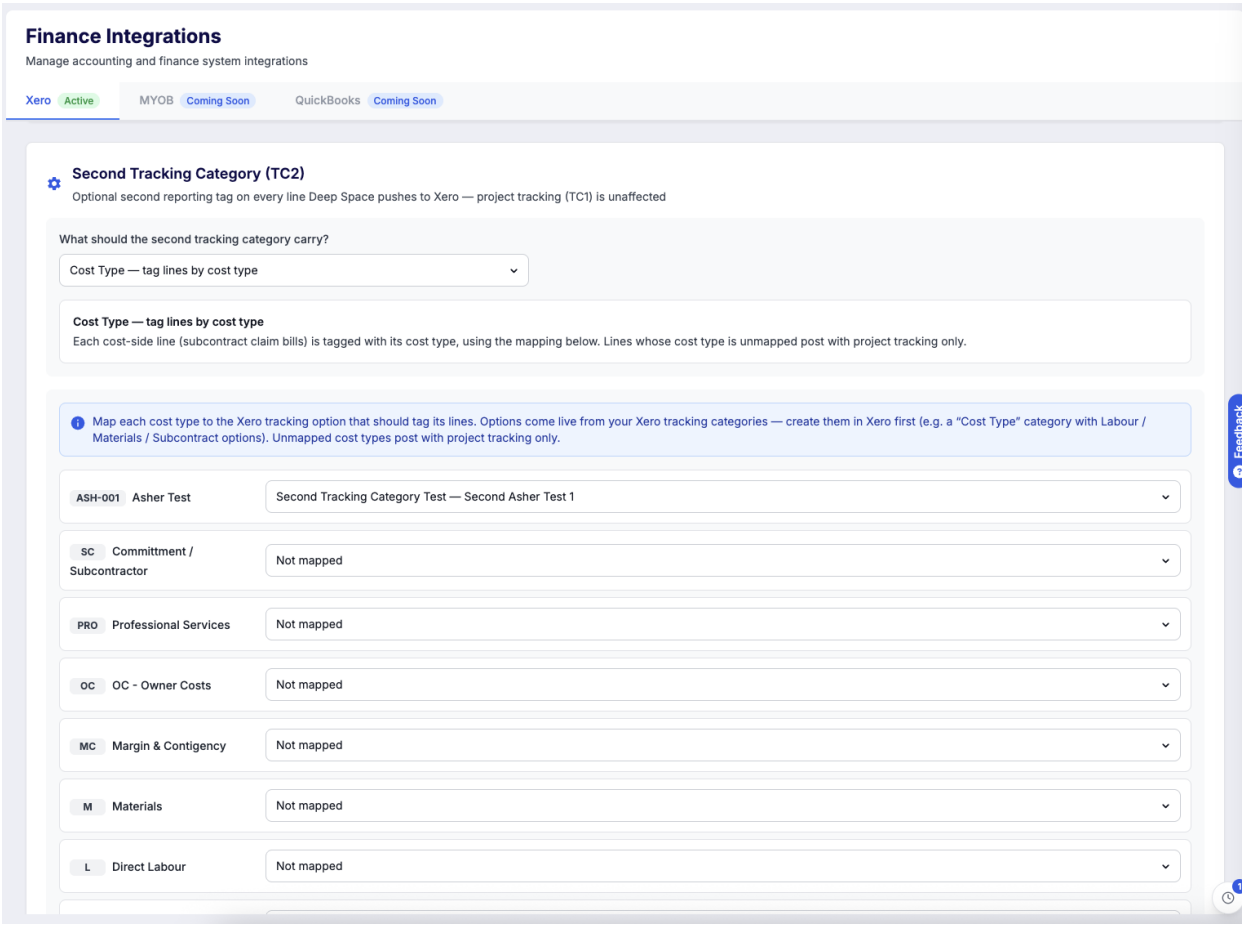
In the Project to Tracking Category Mapping section, map your Deep Space project to its Xero tracking category option. This is TC1, and it stays on Project so every line carries its job.




*Project to Tracking Category Mapping, mapping a Deep Space project to its Xero tracking option.*

## Step 5. Set the Second Tracking Category (TC2)

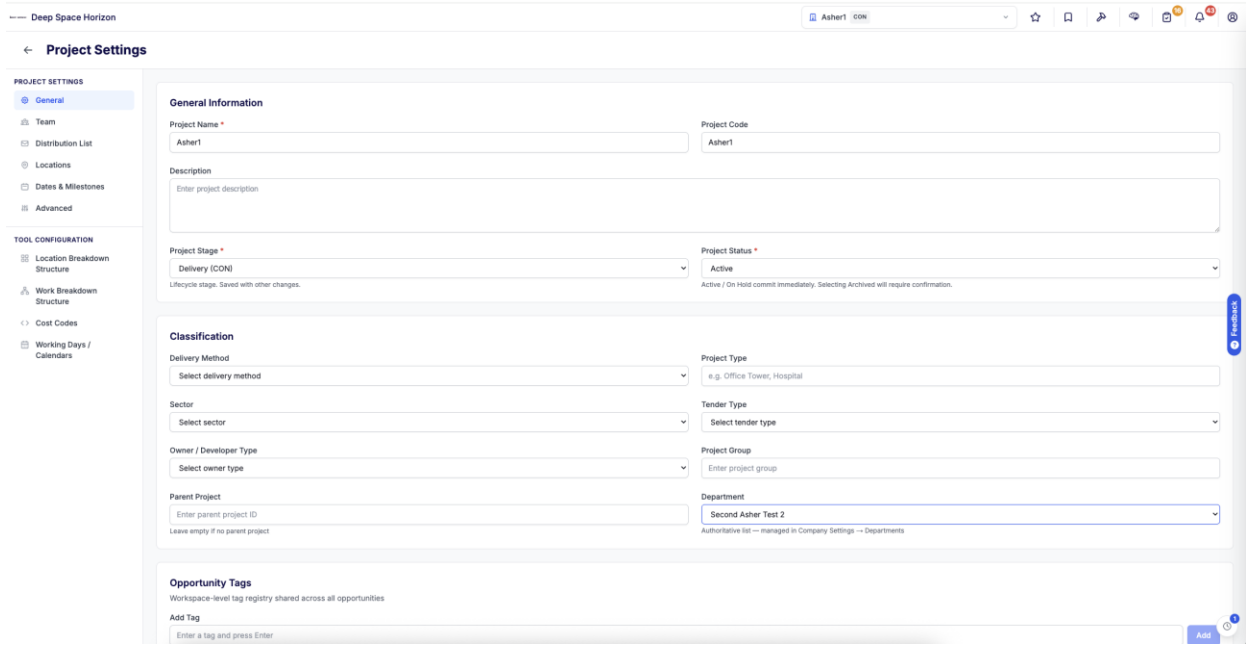
In the Second Tracking Category (TC2) section, choose what the second tag should carry: None, Cost Type, or Department.




*The Second Tracking Category section set to Cost Type, with a row per cost type.*

**If you chose Cost Type:** map each cost type to the Xero tracking option that should tag its lines. Lines whose cost type is unmapped post with project tracking (TC1) only.

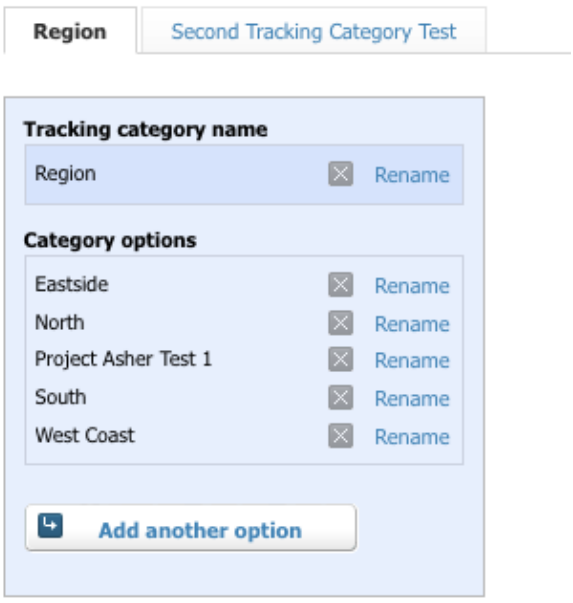
**If you chose Department:** each line carries its project's Department instead. Set the Department on the project (the authoritative list lives in Company Settings, Departments), and it name-matches to the Xero tracking option.



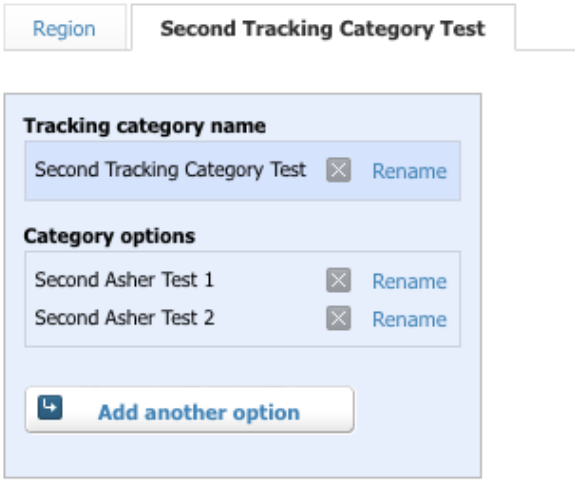

*The Department field on a project, which name-matches to the Xero tracking option.*

## Step 6. Create the matching tracking categories in Xero first

The TC2 options come live from your Xero tracking categories, so create them in Xero before you map them in Deep Space. For example, a Cost Type category with Labour, Materials and Subcontract options, or a category for your regions or departments.




*The first tracking category on the Xero side, carrying the project (TC1).*




*The second tracking category on the Xero side, carrying your chosen second axis (TC2).*

### Step 7. Save and test

Save your changes, then push one record through to confirm the coding. Create a new purchase order or claim, push it, and open the resulting bill or invoice in Xero. Each line should show the expected Account, the project on the first tracking category, and your chosen second axis on the second tracking category.

## Tips

- Start from the recommended default (GL Map by Cost Code plus TC2 Cost Type) unless the shape of your Xero accounts clearly points elsewhere.
- Cost Code mode only pays off if the cost code table actually gets filled. An empty table sends every line to the single Cost of Goods Sold account, which is worse than Cost Type mode would have been. Confirm who owns keeping that table current.
- You can switch GL modes later without losing either set of mappings, so it is safe to change your mind.
- Because TC2 is a single axis, decide early whether cost-type reporting or regional reporting matters more. You cannot have both.

## Troubleshooting

**Lines land in Xero with an empty tracking column.** Cause: the cost type or department is not mapped, or the matching tracking category was not created in Xero first. Fix: create the tracking category and its options in Xero, then map each cost type or set each project's Department in Deep Space.

**Everything lands in one account in Xero.** Cause: GL is in Cost Code mode but the cost code table is not filled, so lines fall to the Cost of Goods Sold default. Fix: complete the cost code mapping, or switch GL to Cost Type mode and map your cost types.

**A line shows the wrong region or department in Xero.** Cause: in Department mode, the project's Department name does not exactly match a Xero tracking option. Fix: make the project's Department name match the Xero option name.

**Historic records are untagged in Xero.** Cause: already-synced records are not re-tagged retroactively. Fix: [needs verification] check whether the record needs to be re-pushed, and confirm current behaviour with the team.

## Related features

- **Purchase order push and back-migration** how POs and Xero bills reconcile against each other.
- **Progress claims and subcontractor claims** the records that get coded and pushed using this mapping.
- **WIP Report** reads the same commercial data once your coding is set.