

Knowledge Base



My Account

This page allows you to review the status of your organisation’s Xero connection, sync your Xero file with Gojee, switch between multiple Gojee accounts (if you have added multiple Xero Accounts under the same email address) and link a new Xero organisation.

To get started, navigate to the [My Account](#) page. You will be presented with the following screen:

Organisation > My Account

Feedback

My Account

Active Organisation: Demo Company (AU)

Link a new Xero Organisation

Role: Organisation Owner

Organisation Settings

Xero Connections

Sync Xero Now

Manage Subscription



Disconnect from Xero

Linked Organisations

| Organisation | Link Type | Status | Active Roles | Actions |
|--|--------------------|--------|---------------|---------|
| Demo Company (AU) | Organisation Owner | Active | Administrator | Switch |
| Demo Company (AU) | Organisation Owner | Active | Administrator | Switch |
| Demo Company (AU) | Organisation Owner | Active | Administrator | Switch |
| Very Real Legit Business Venture Inc. Ltd. | Organisation Owner | Active | Administrator | Switch |

The items in the image above are described below:

Xero Linkage

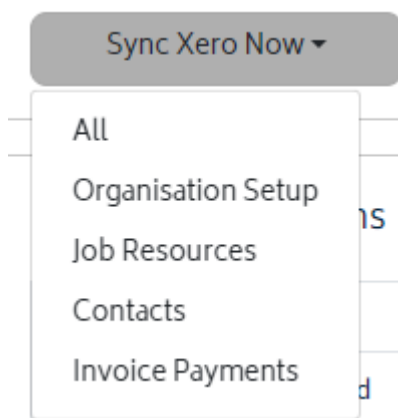
Active Organisation + Xero Link Status: Shows the active organization that you are logged in to. If the icon next to Active Organization is green  , this means that your account's connection between Gojee and Xero is active, if it is red  , this means that the connection between your Gojee and Xero account has been disconnected.

Sync Xero Now: This is an option that allows you to trigger a sync to pull in any changes from Xero to Gojee on demand.

Note: By default, the changes made in Gojee will be pushed into Xero automatically and these do not need to be synced manually. For example, adding new customers / suppliers, sending invoice & bill transactions, payments etc.

There is an overnight sync which also happens automatically to pull the latest information from Xero into Gojee. As such, you should only need to use this button on rare occasions when you want to pull in a new transaction immediately.

- When processing a sync on demand, you will be presented with several options. To process the sync as quickly as possible, its recommended you select only the items you would like to sync:



Organisation Setup

- Organisation
- Branding Themes
- Payroll Calendars
- Accounts
- Pay Items

Job Resources

- Assets
- Staff

Contacts

- Customers

- Suppliers

Invoice Payments

- Transactions on xero invoices

All

- *All above components*

Manage Subscription: Navigates you to Xero subscription page where you can manage your Gojee subscription i.e. upgrade plans, or service cancellation.

Disconnect from Xero: Allows you to disconnect a Gojee account from Xero. This is not recommended unless you know what you're doing.

Link Type: Displays your access role for the connected organisation. "Organisation Owner" means that you are owner of the Gojee account, where "Employee" for example means that you have been added by an admin to the account.

Switch Active Organisation

Switch: Allows you to switch between the multiple Gojee accounts you have been granted access to. When you switch you will log out of the active account and log into the new account. The name of the new organisation you switch to will then be listed at the top of this page. Simply click on the "Switch" button to change the account.

Link a new organization: This provides an option to link a new Xero organisation your Gojee account. Clicking "Link a New Organisation" will direct you to Xero:



Gojee wants access to:

Select another organisation

Organisation data



9 connected organisations

View and manage your:

- Timesheets
- Business transactions
- Contacts

View your:

- Employees
- Payroll settings
- Organisation settings
- Fixed assets

By allowing access, you agree to the transfer of your data between Xero and this application in accordance with Xero's [Terms of use](#) and the application provider's terms of use and [privacy policy](#).

You can disconnect at any time by going to [Connected apps](#) in your Xero settings.

Continue with 9 organisations

Cancel

- From the dropdown “select another organisation”, choose the organisation you’d like to connect, and click “Allow Access” or “Continue”. If you only have one Xero company to connect, there may not be a dropdown option, and your company will already be selected.

Organisation Settings: This is a link the settings page. Refer to [Organisation Settings](#) section for more information.

Next: [Organisation Settings](#).

