

Xero API Setup Guide

Step-by-step guide for "Xero M365 OAuth Service"

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Introduction

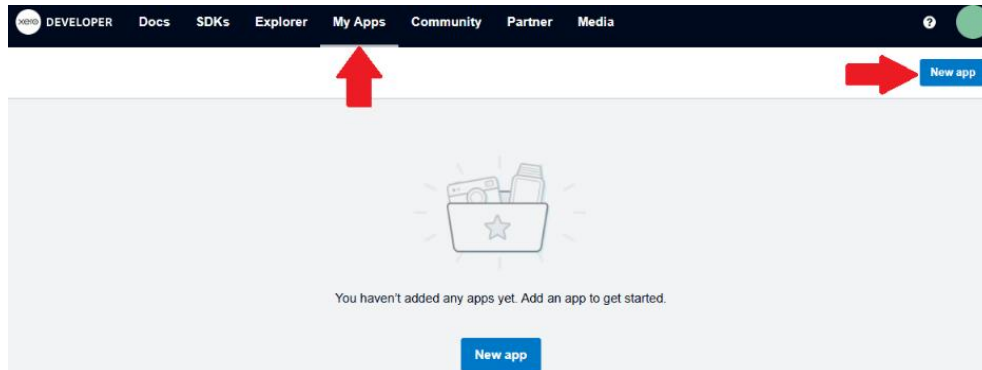
This guide provides clear, step-by-step instructions for configuring an API in Xero to use in the Xero M365 OAuth Service.

Step 1: Login to the Xero Developer Portal

- Go to <https://developer.xero.com/app/manage/> and sign in with your Xero account.

Your Xero user account needs access to invoices in Xero.

- Go to **My Apps** in the top menu.
- Click **New App**



- Select **Web App** from the options and enter the following.
 - App Name – **M365 OAuth WebService** (Avoid using “Xero” in the name).
 - Company or Application URL – **Enter your company’s website**, This MUST start with HTTPS.
 - Enter the website you will deploy the site to followed by /xero/callback i.e. <https://yourwebsite.com/xero/callback>
- Tick the checkbox to accept the Xero Developer Platform Terms & Conditions.
- Click **Create App**.

Add a new app ×

App name

M365 OAuth WebService 2

Integration type

☒ **Web app** 1
Standard auth code
Connect up to 25 organisations before certification

☐ **Mobile or desktop app**
Auth code with PKCE. For native apps that can't securely store a client secret
Connect up to 25 organisations before certification

☐ **Custom connection**
Premium one-to-one integration that utilises the client credentials grant type
Only available to Xero organisations in UK, Australia, New Zealand and USA

[Learn more about integration types](#)

Company or application URL

<https://mycompany.com> 3

Redirect URI

<https://mycompany.com/xero/callback> 4

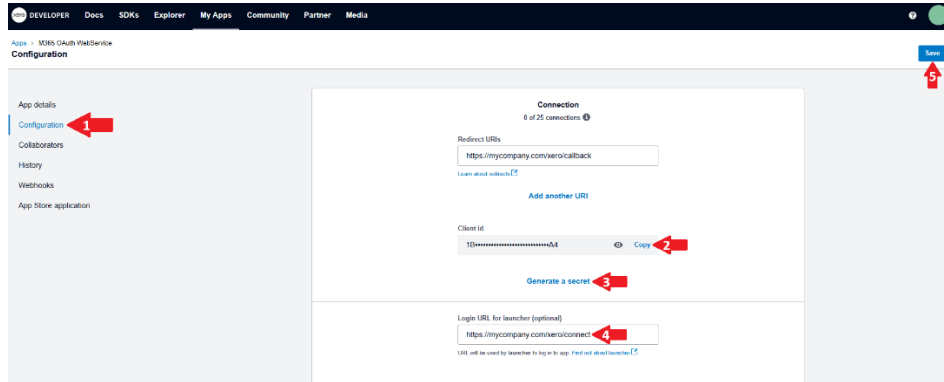
Add more redirects after creating app. [Learn about redirects](#)

☒ I have read and agree to the [Xero Developer Platform Terms & Conditions](#)

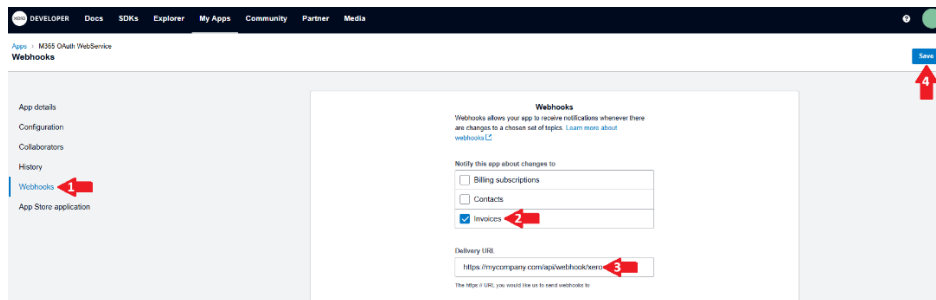
5 6

Create app Cancel

- After creation go to **Configuration** in the left menu
 - Click **Copy** by Client ID and save the value in AppSettings.json
 - Click **Generate Secret** and save the value in AppSettings.json
 - In the **Login URL** enter the website you will deploy the site to followed by /xero/connect
i.e. <https://yourwebsite.com/xero/connect>
 - Click **Save** in the top right corner



- Now select **Webhooks** from the left menu
 - Tick the **Invoices** checkbox
 - In the **Delivery URL** enter the website you will deploy the site to followed by /api/webhook/xero
i.e. <https://yourwebsite.com/api/webhook/xero>
 - Click **Save** in the top right corner



- Now **Copy** the **Webhooks Key** and save the value in AppSettings.json

Webhooks

Webhooks allows your app to receive notifications whenever there are changes to a chosen set of topics. [Learn more about webhooks](#)

Notify this app about changes to

☐ Billing subscriptions

☐ Contacts

☒ Invoices

Delivery URL

The https:// URL you would like us to send webhooks to

Webhooks key

Rwx5Dvqyjc9h8BMWzOdwGwZBAj6ZYVOK [Copy](#)

Status

Intent to receive required

[Send Intent to receive](#)

Click the **Send 'Intent to Receive'** button.

- Once complete you should see the **Status** turn green and say **OK**

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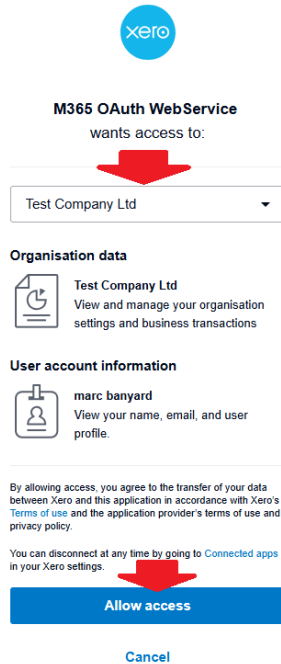
Status

OK

Last sent at 2025-07-15 05:55:28 UTC

- Open a new tab in your browser and navigate to the **Login URL** you configured earlier
i.e. <https://yourwebsite.com/xero/connect>

- You should then be prompted with a Xero Authentication screen, select the company you want to send emails as and click **Allow Access** button.

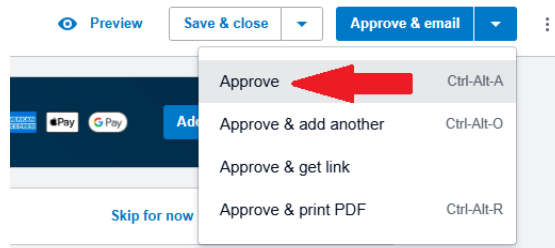


- You will then be returned to your web app with a message that says the following

Successfully connected to Xero!
Tokens saved to xero_tokens.json.

- Your app is now setup and ready to use.

When creating invoices in Xero you simply need to click the dropdown next to the **Approve and Email** button and select **Approve**, the keyboard shortcut is **Control+Alt+A**



- The system will then send the email and automatically mark the email as Sent in Xero.
- If you need to resend an invoice, simply untick the **Sent** checkbox for the invoice and the system will resend it and mark as sent again.

