Xero API Setup Guide

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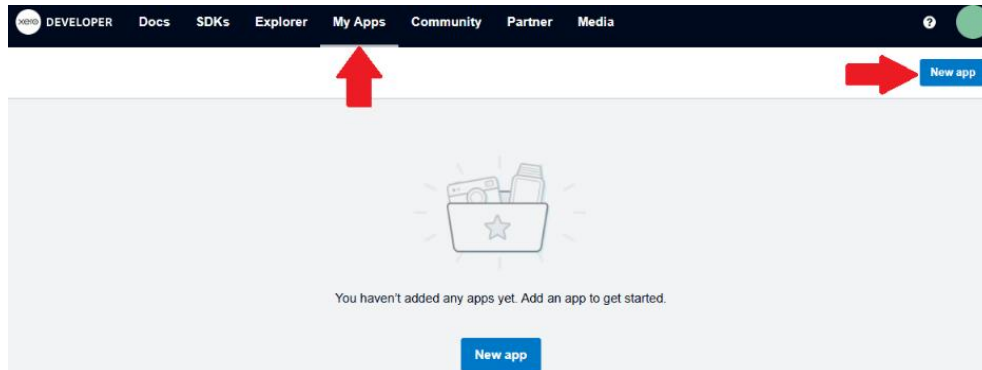

Introduction

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.
  - o App Name – **M365 OAuth WebService** (Avoid using "Xero" in the name).
  - o Company or Application URL – **Enter your company's website**, This MUST start with HTTPS.
  - o 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**.

- 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
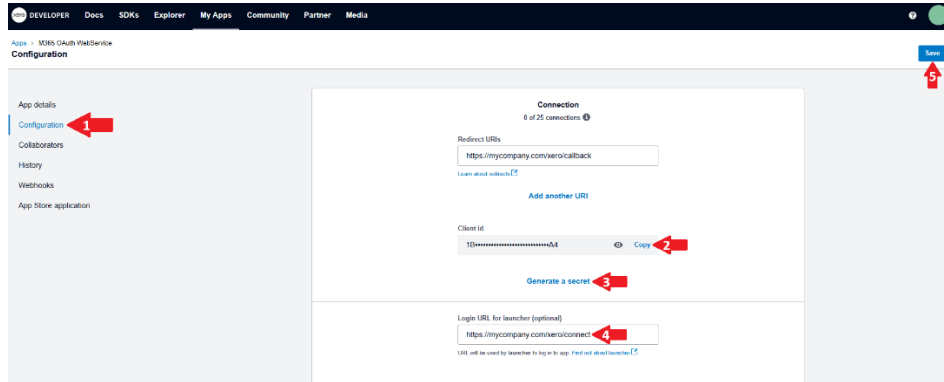
- Now select **Webhooks** from the left menu
    - Tick the **Invoices** checkbox
    - In the **Delivery URL** enter the website you will deploy the site to followed by /api/webhook/xero

        i.e. **https://yourwebsite.com/api/webhook/xero**
    - Click **Save** in the top right corner
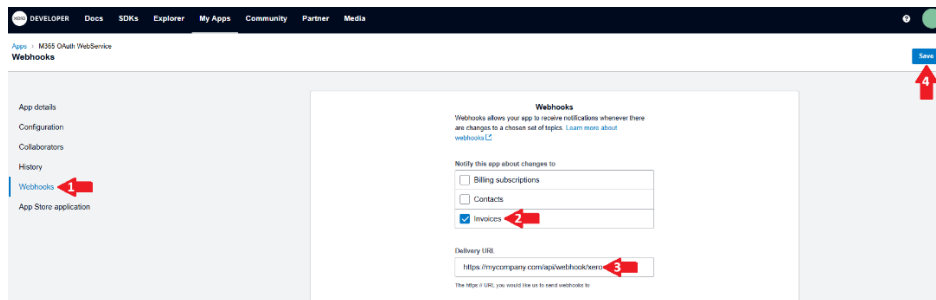
- Now **Copy** the **Webhooks Key** and save the value in AppSettings.json

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

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

- 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.
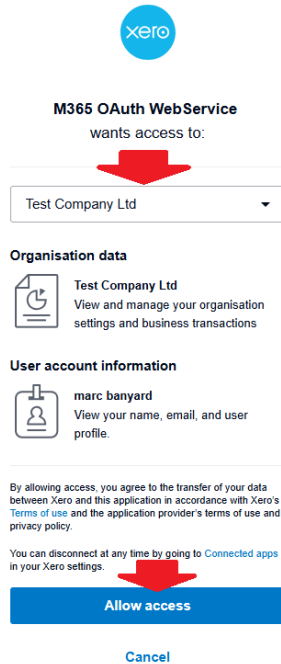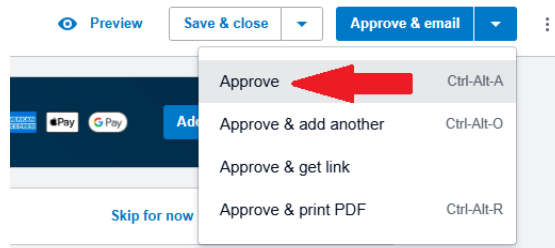

- You will then be returned to your web app with a message that says the following

- 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.