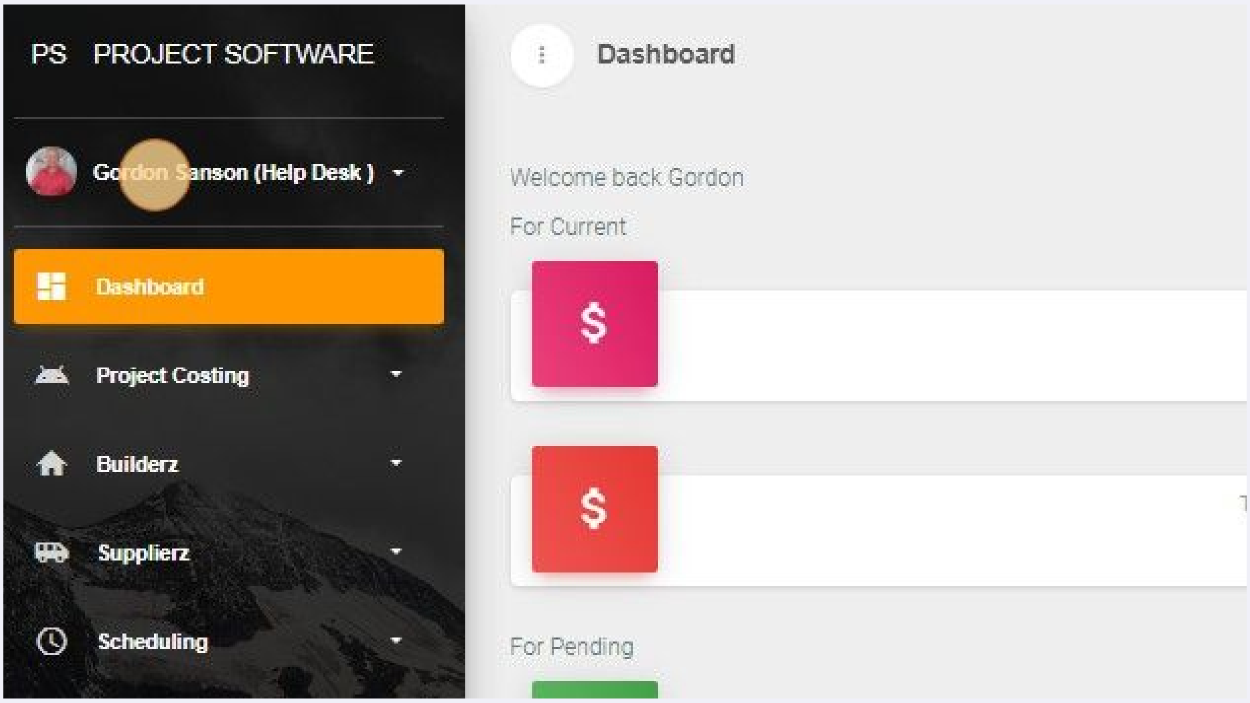
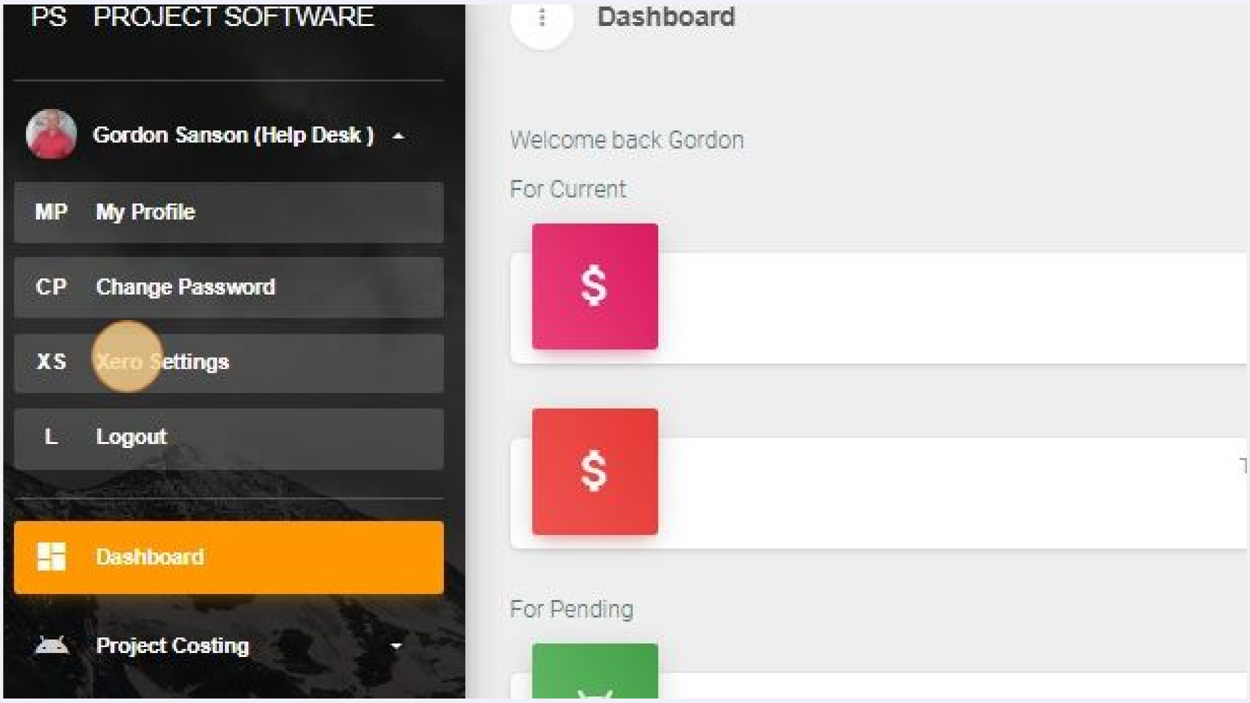
Setting up Xero Integration

Supplier Invoices (Bills) and sales invoices can integrate directly with Xero. If you have a Xero account follow these steps to activate the integration.

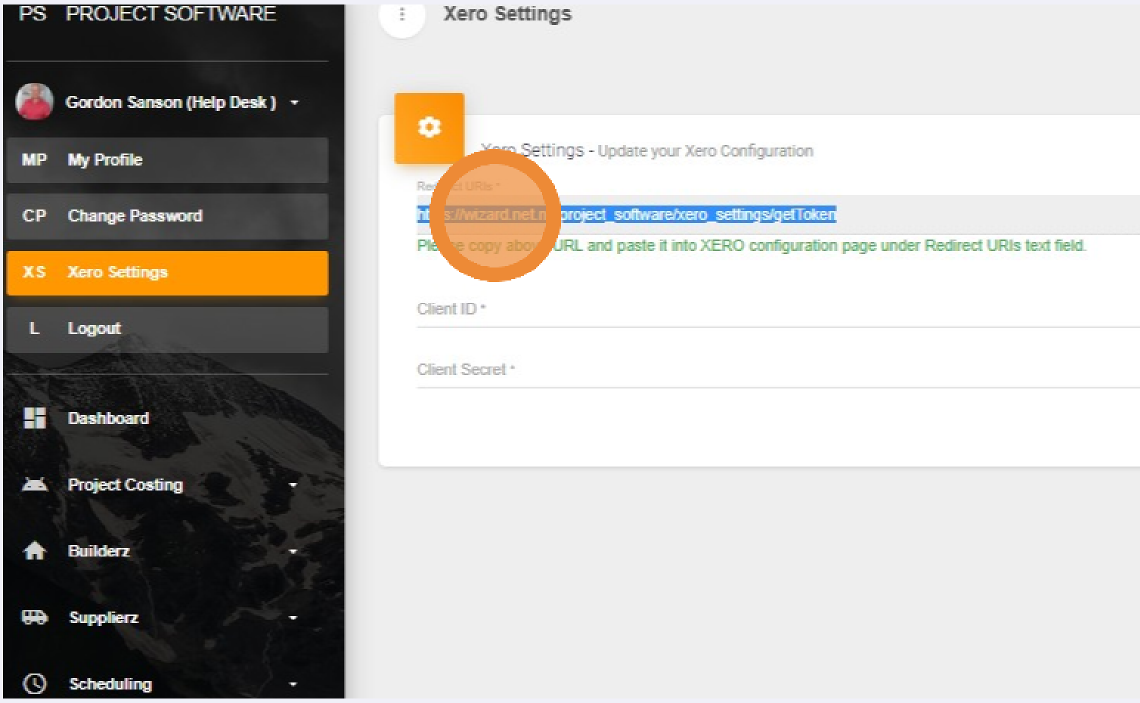
1 Click on your profile at the top of the menu



2 Click "Xero Settings"

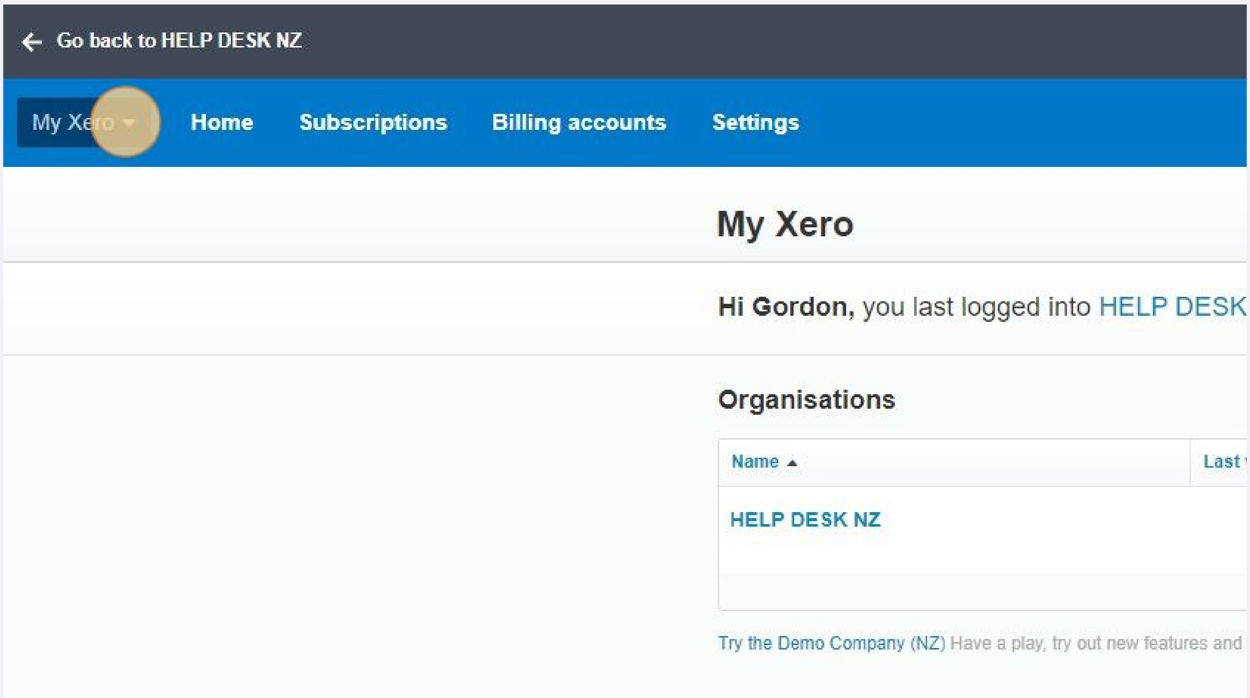


3 This is the Xero Settings page. You will need to copy and paste information between this page and your Xero account for the Integration to work. This is a once only setup process, so once done you won't have to do it again.

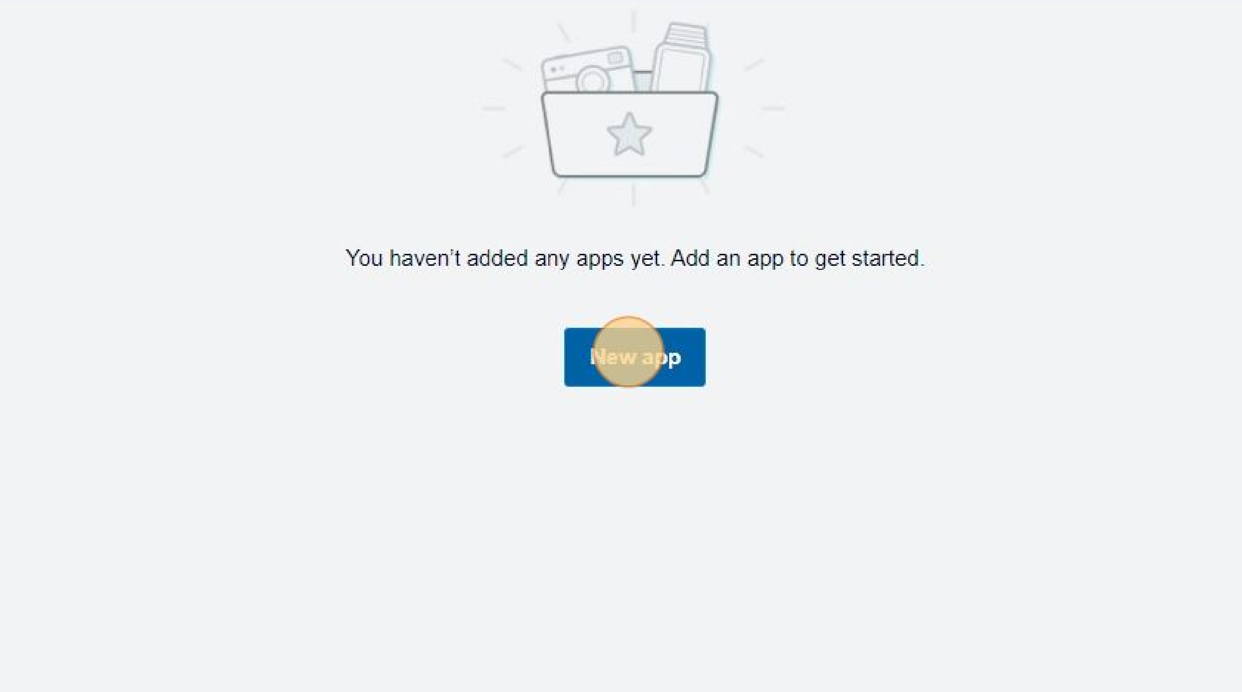


4

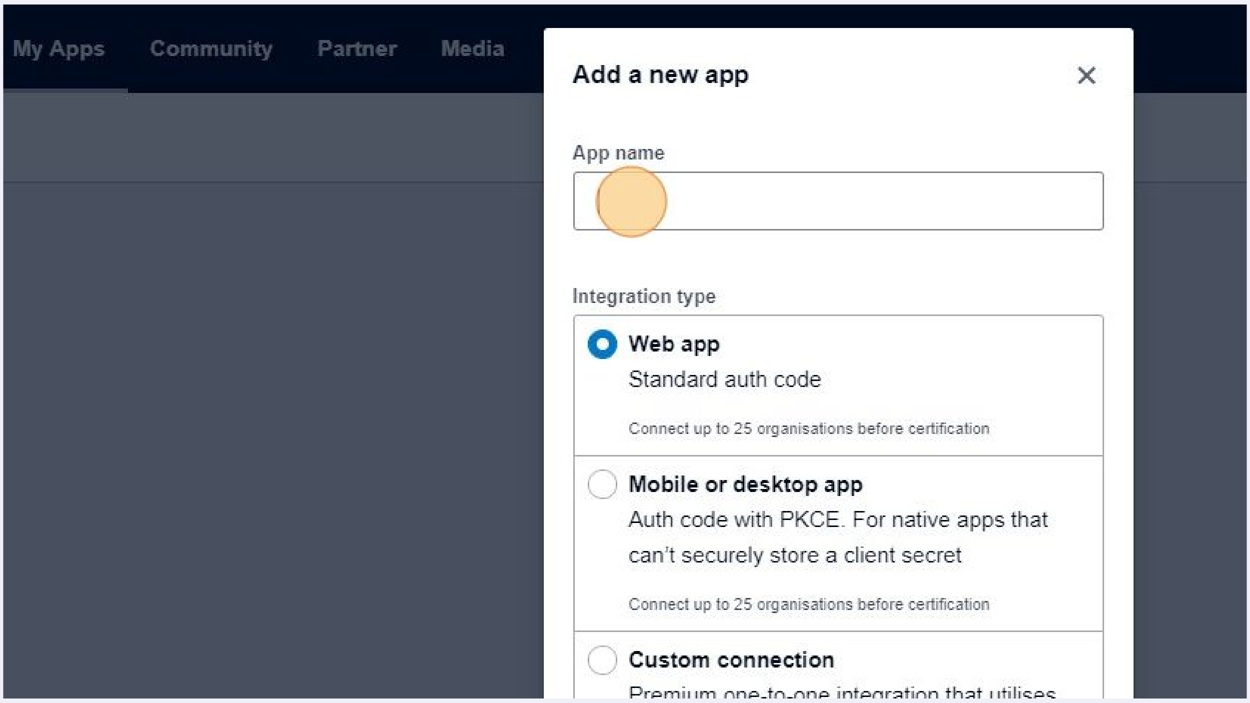
To set up Xero Integration you need to create an app within Xero that encrypts your financial data and manages the information transfer between Xero and you project management software account. Once it is set up you don't need to do anything else, it works quietly in the background. To start: Open a new window for your Xero account and navigate to "My Xero". If you have more that one Xero Account, choose the company from Xero drop down list that you wish to integrate.



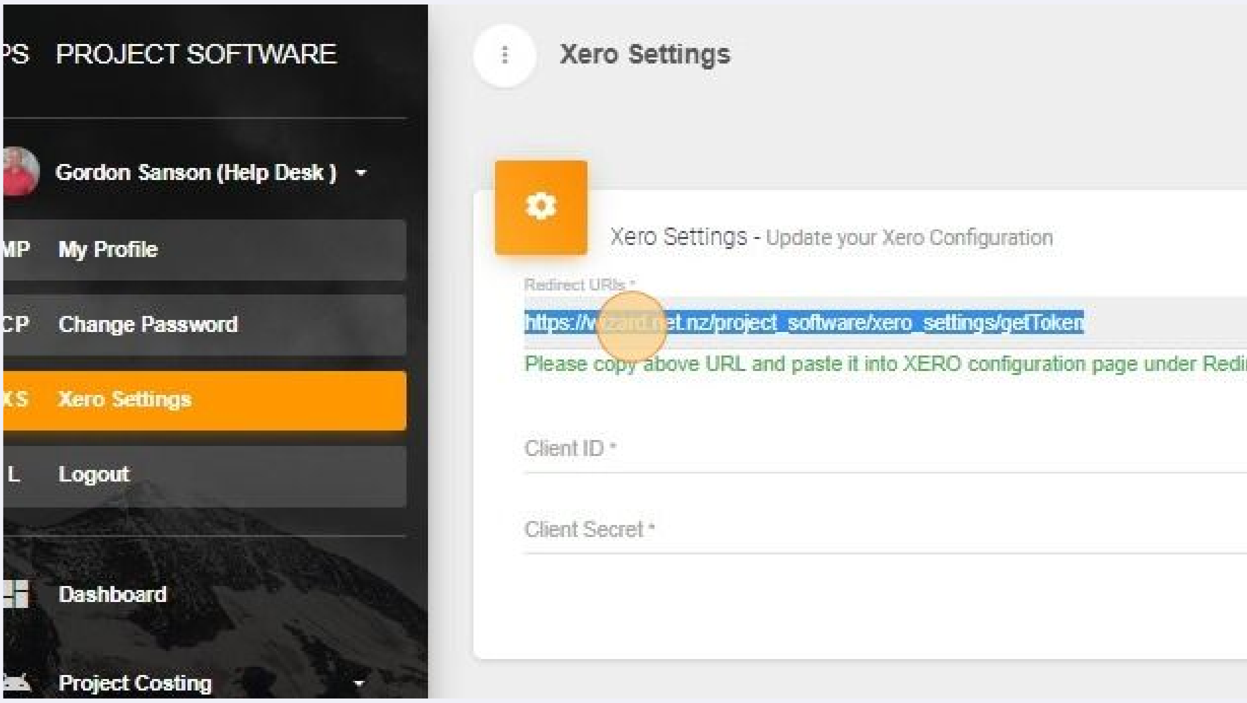
5 in "My-Xero" Click "New app"



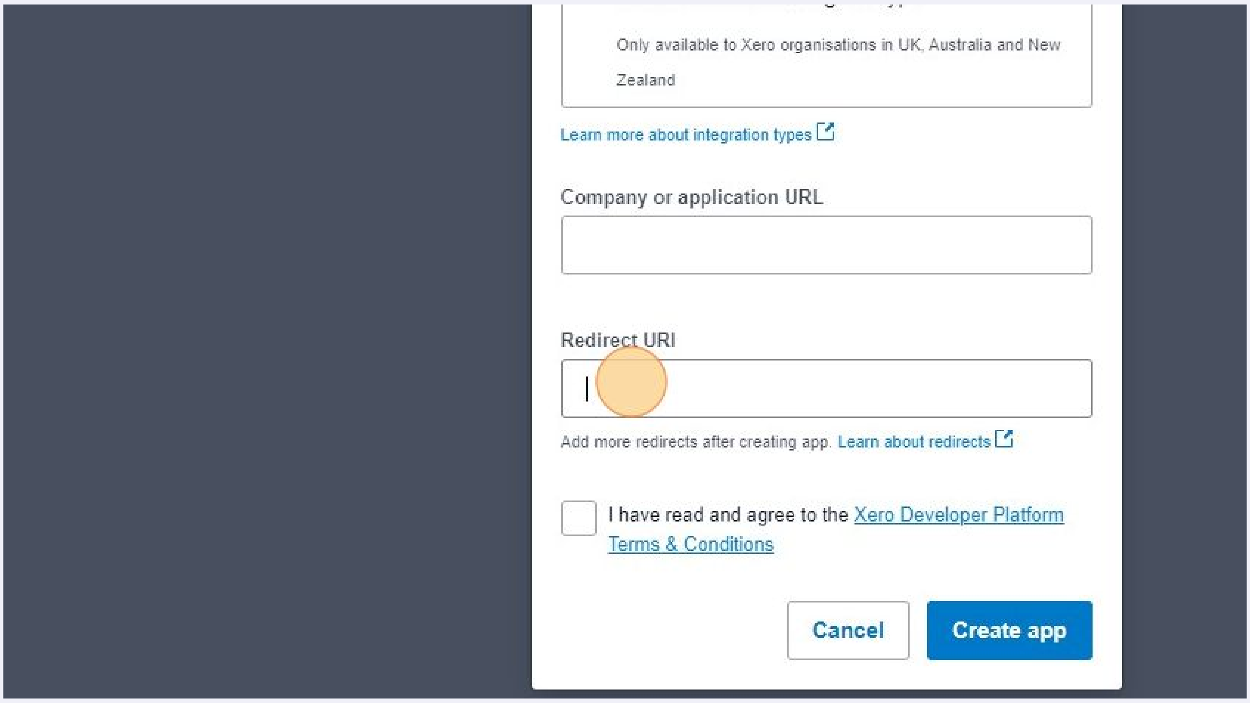
6 Click on "My Apps" and "Add a New App"



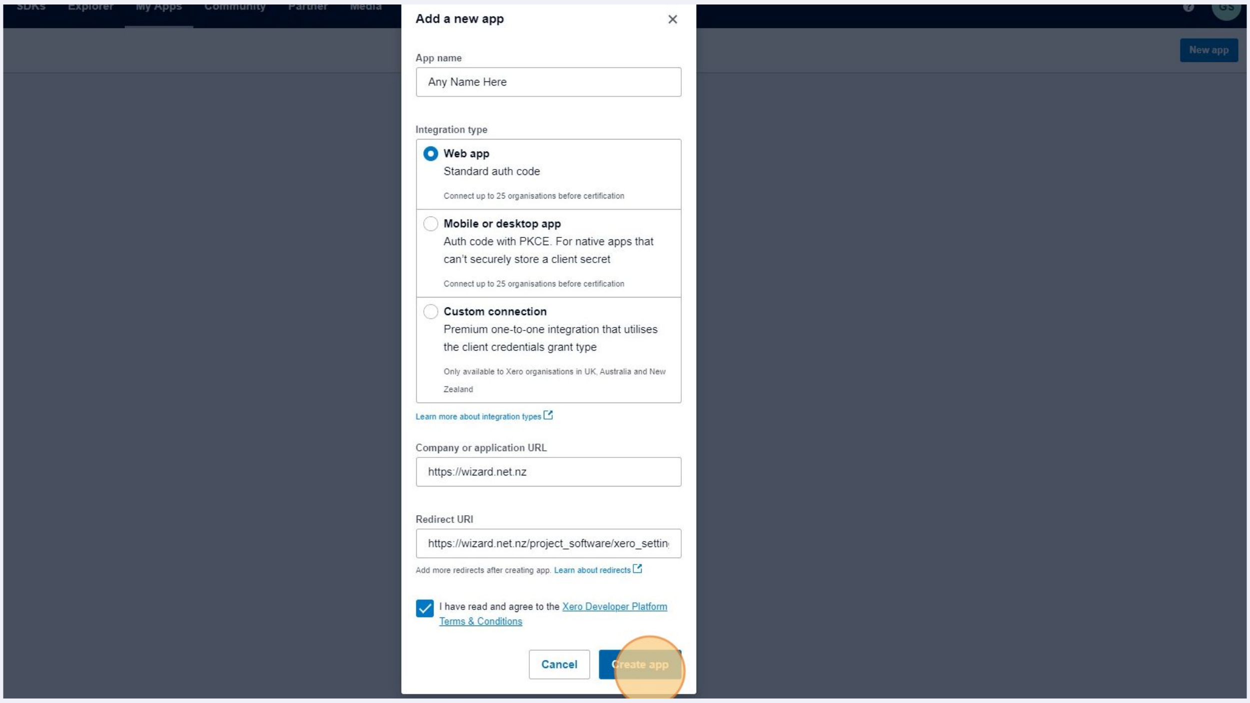
7 Head back to the "Xero Settings" in Project Software and copy "Redirect URL" field.



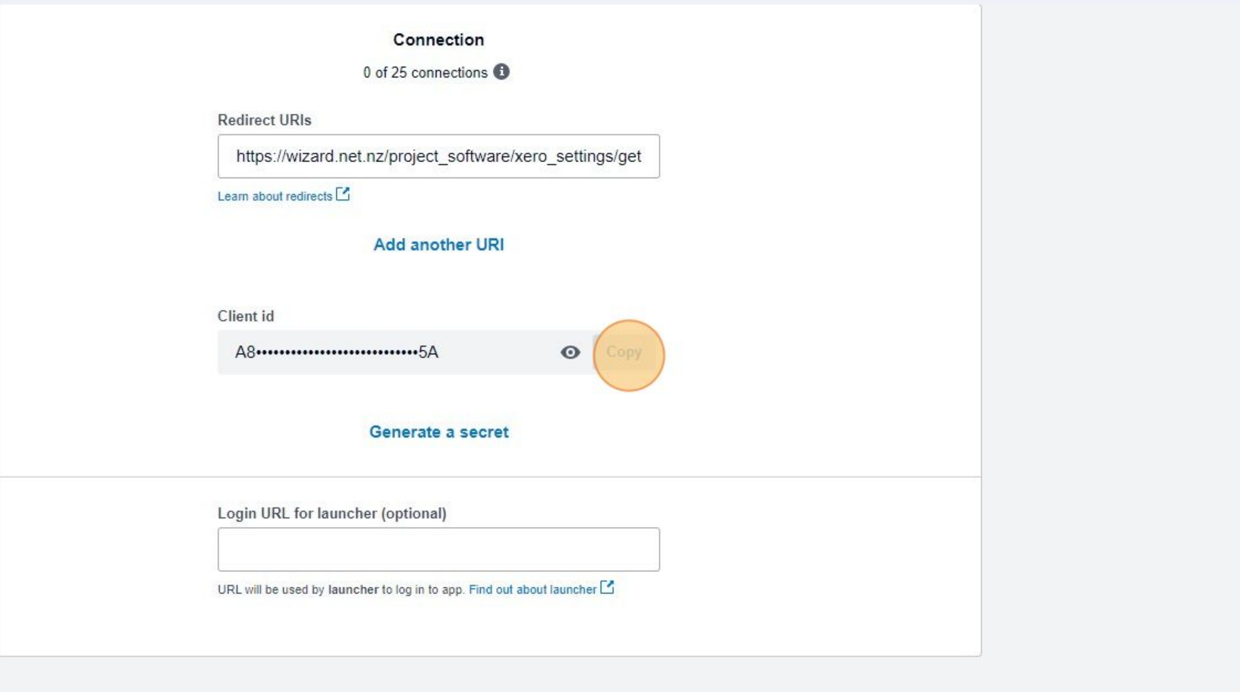
8 Go back to MyXero and paste the copied information into the "Redirect URL" box



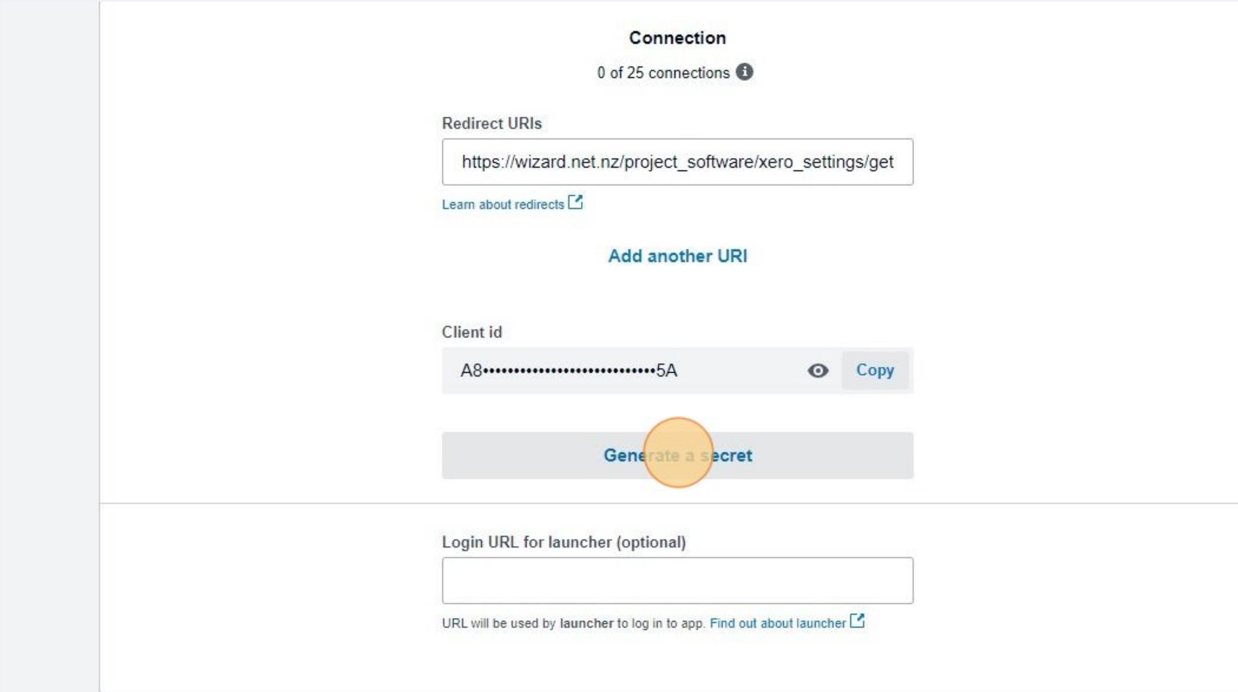
9 Two other fields need completing: App Name: You can call this anything you like; Company or Application URL - This should be the web address of either your company website or the project management software web address. Once the form is completed click "Create App"



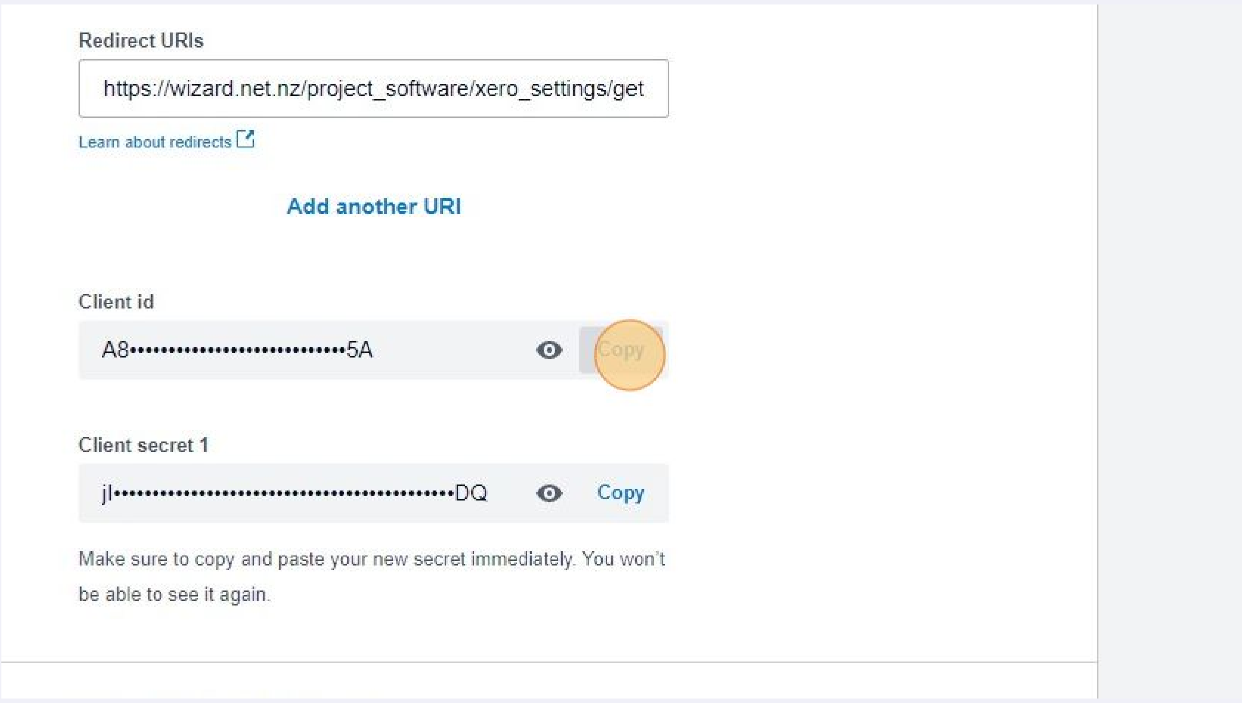
10 The App is Created.



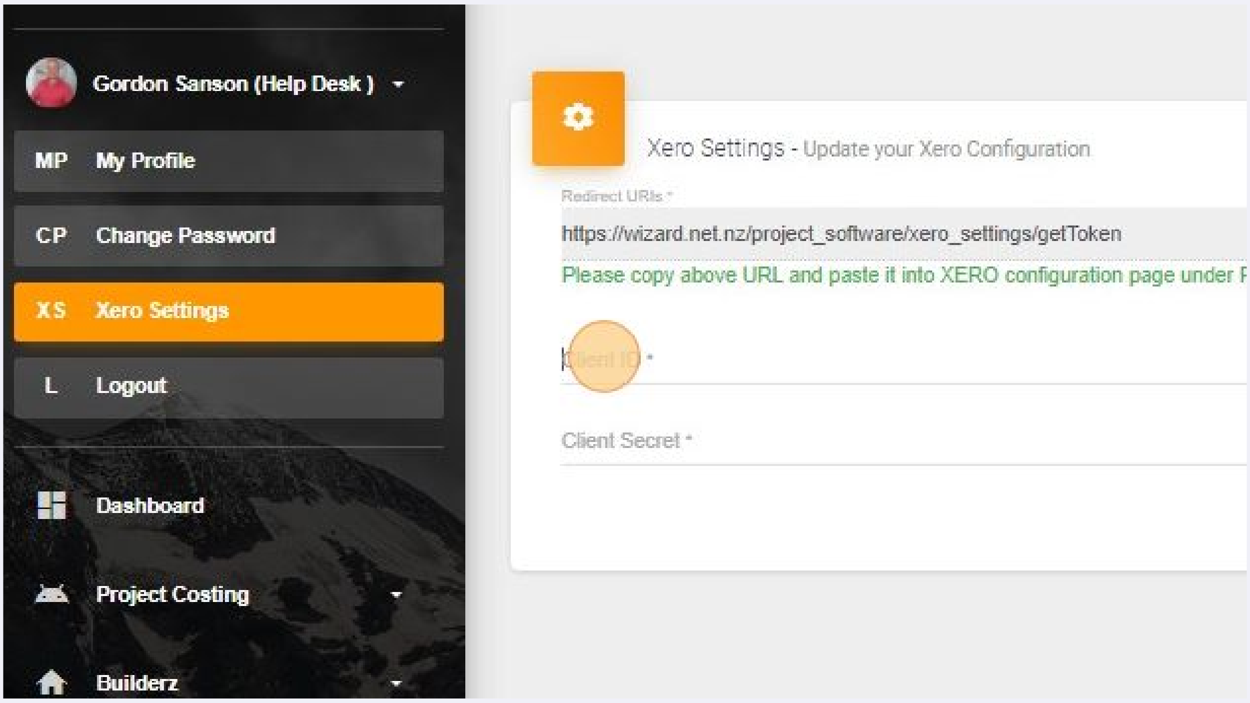
11 Click "Generate a secret"



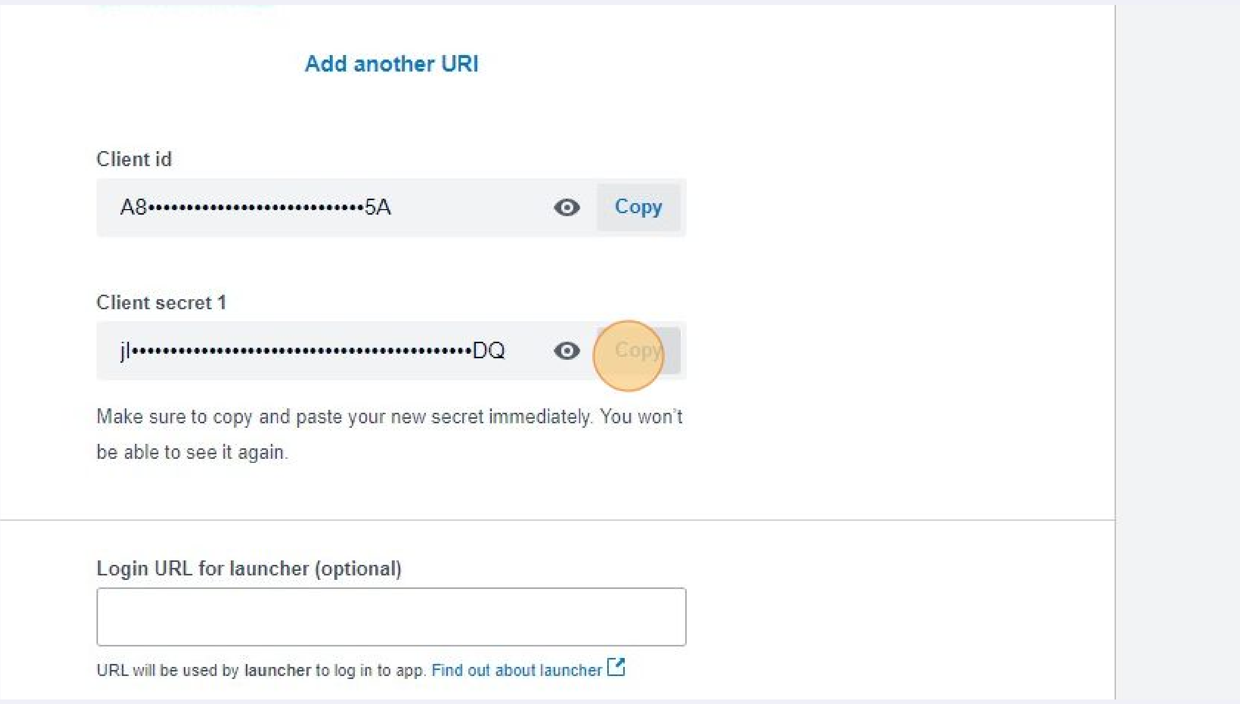
12 Click "Copy" Client ID



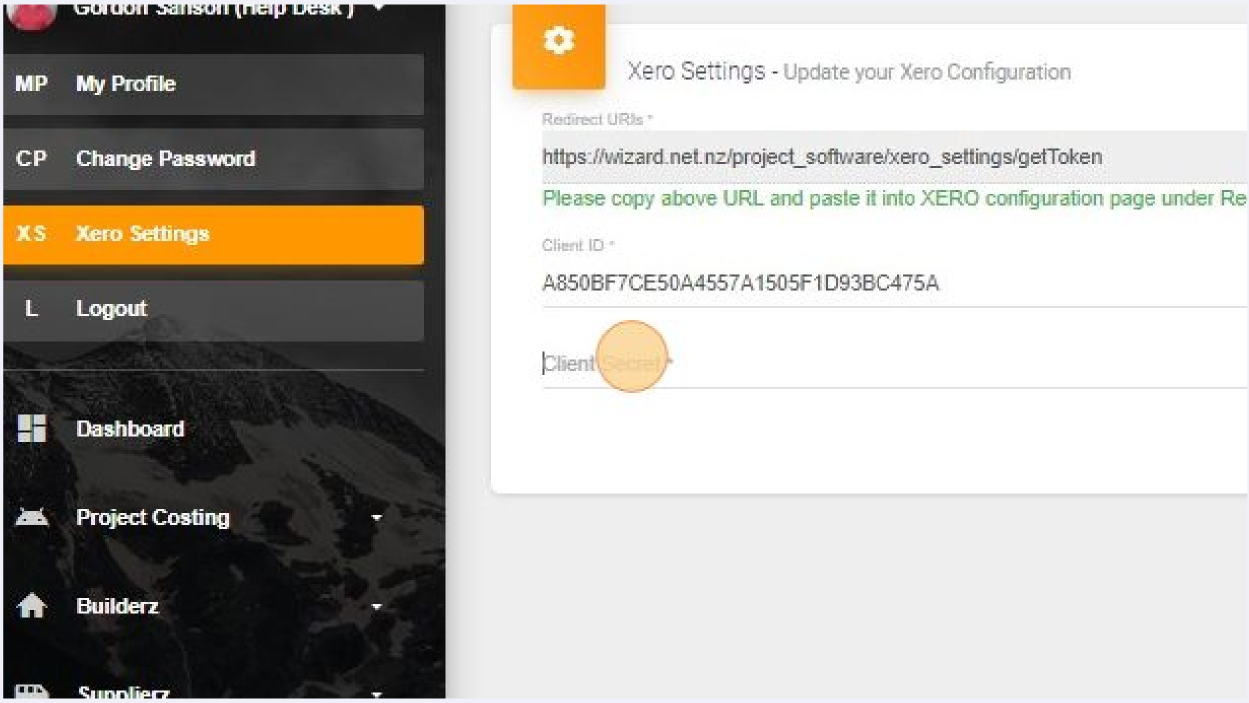
13 Go Back to the Project Software and paste the Xero information into the "Client ID" field.



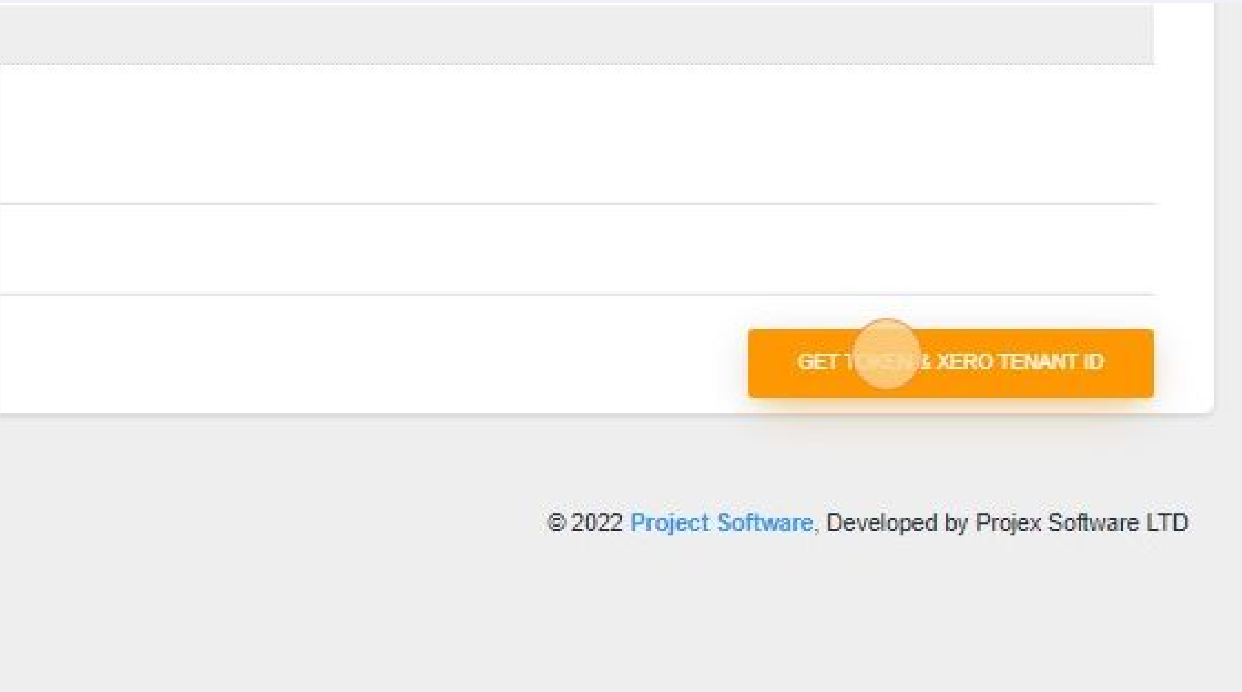
14 Now, from the Xero App copy the "Client Secret 1"



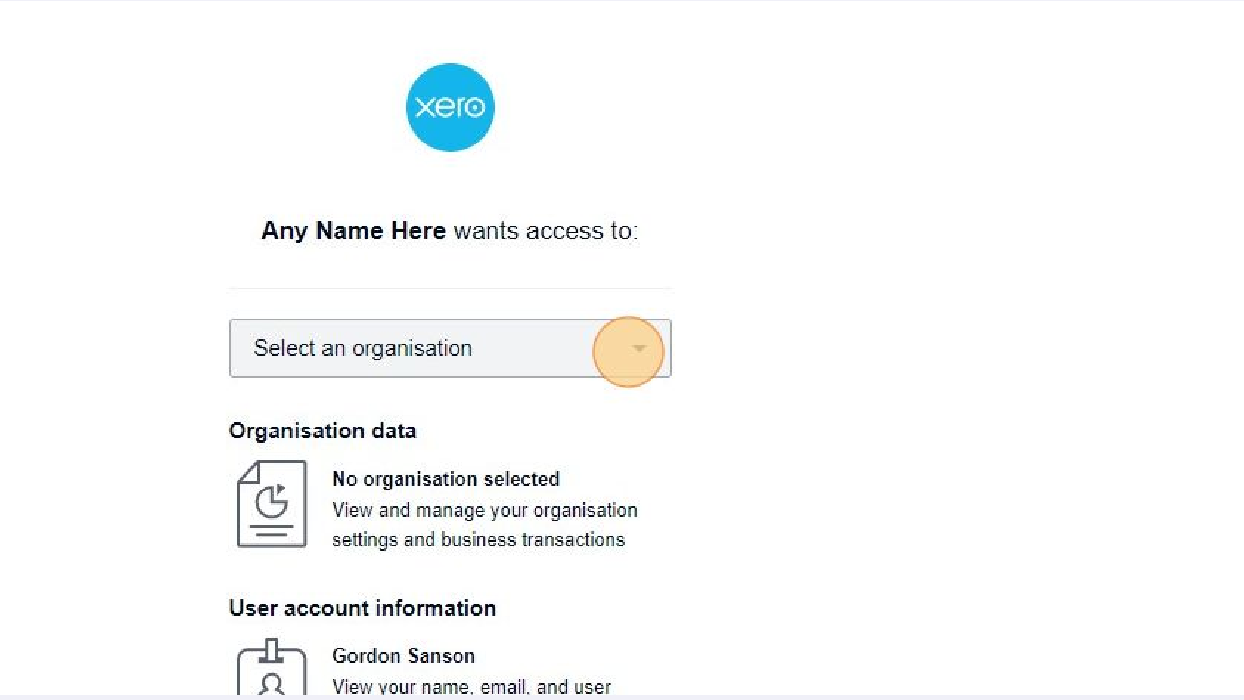
15 Paste the Client Secret One into the "Client Secret 1" field in the Xero Settings of the Project Software.



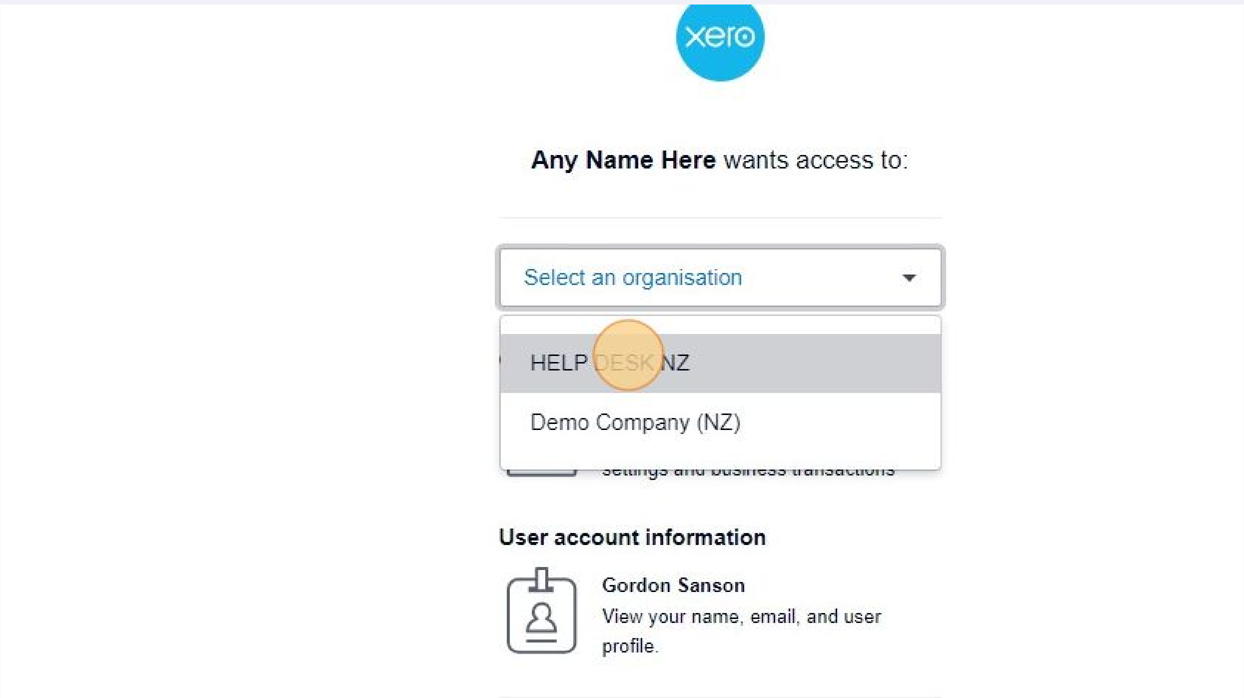
16 Now Click "GET TOKEN XERO TENANT ID"



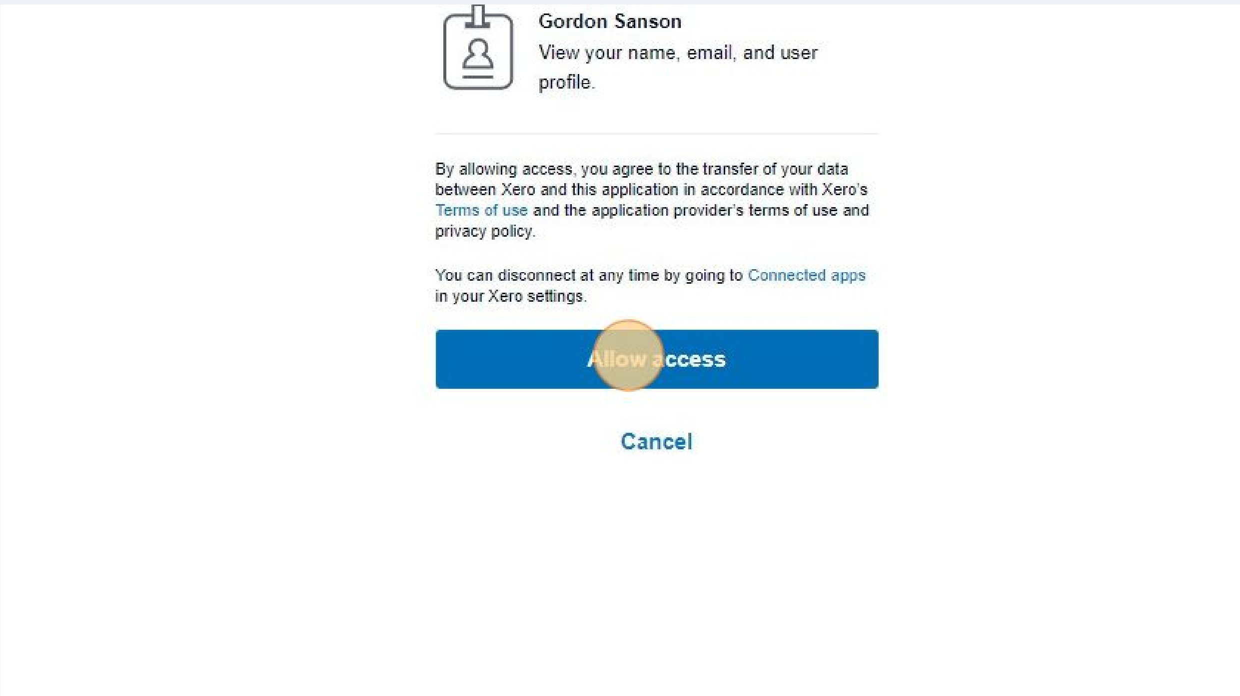
17 In your "My-Xero" Click "Select an organisation"



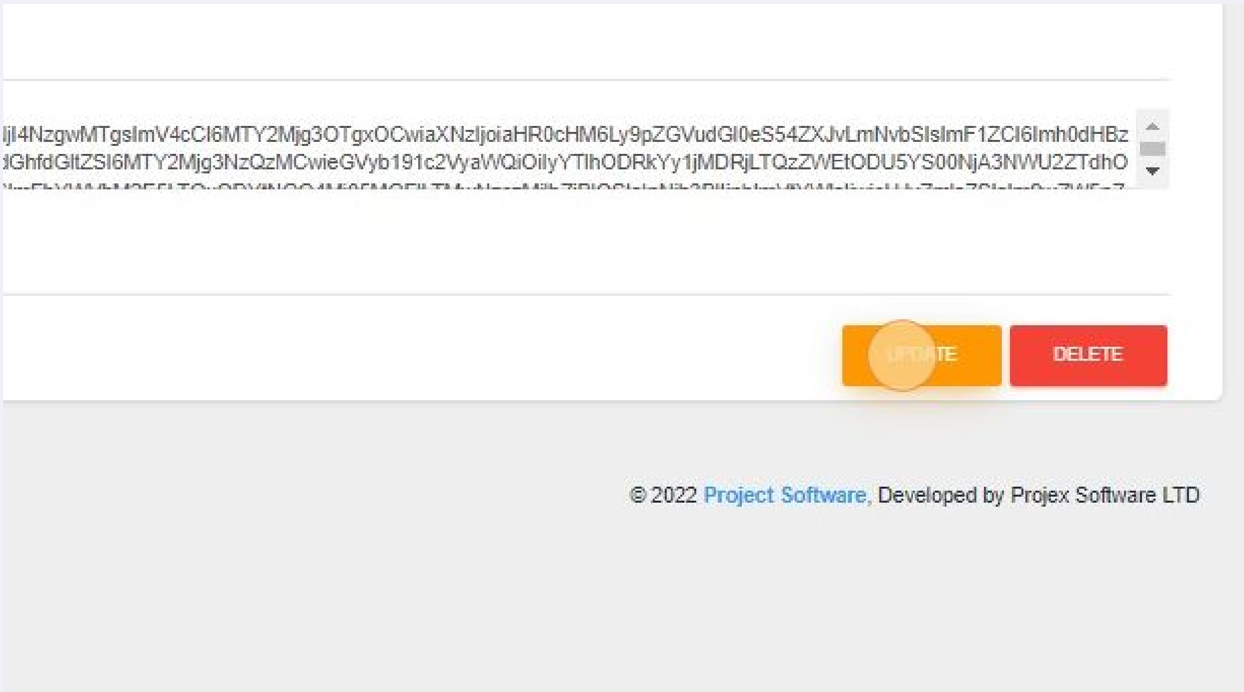
18 Choose your Xero account name for the integration.



19 Click "Allow access"



20 Return to Project Software and click "Update" in the Xero settings.



21 Congratulations! Everything is updated and Xero Integration will now work. And don't worry, you shouldn't need to do this again!