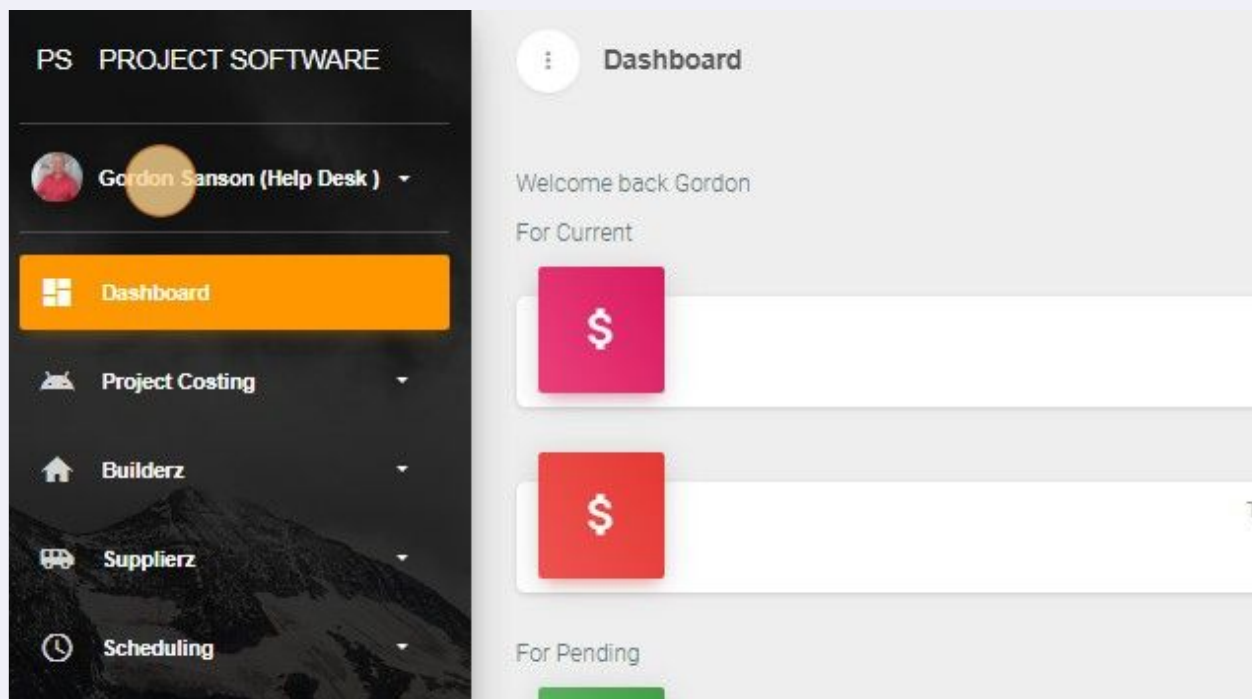


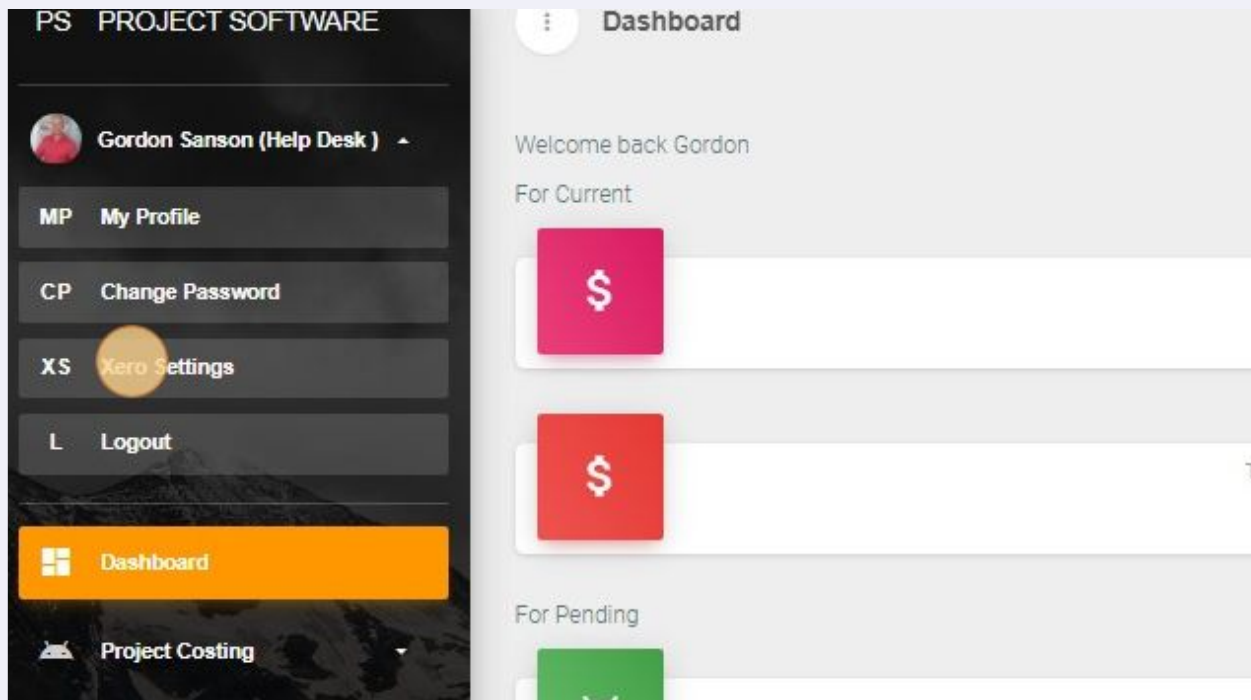
Setting up Xero Integration

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

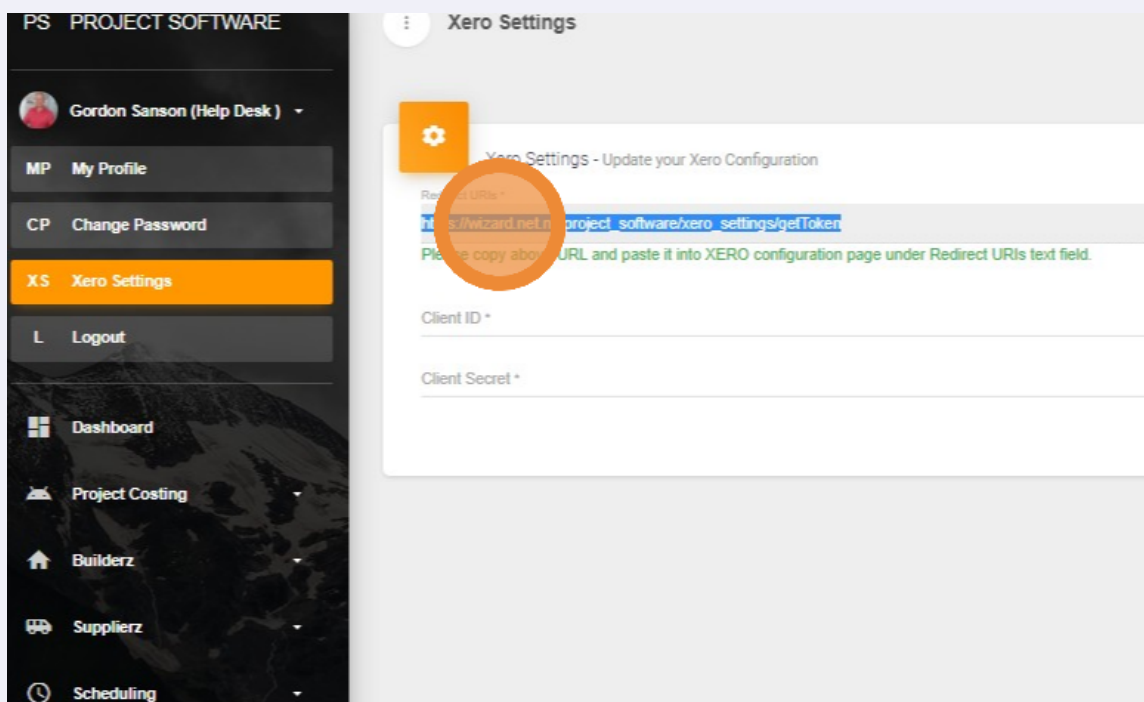
- 1 Click on your profile at the top of the menu



2 Click "Xero Settings"

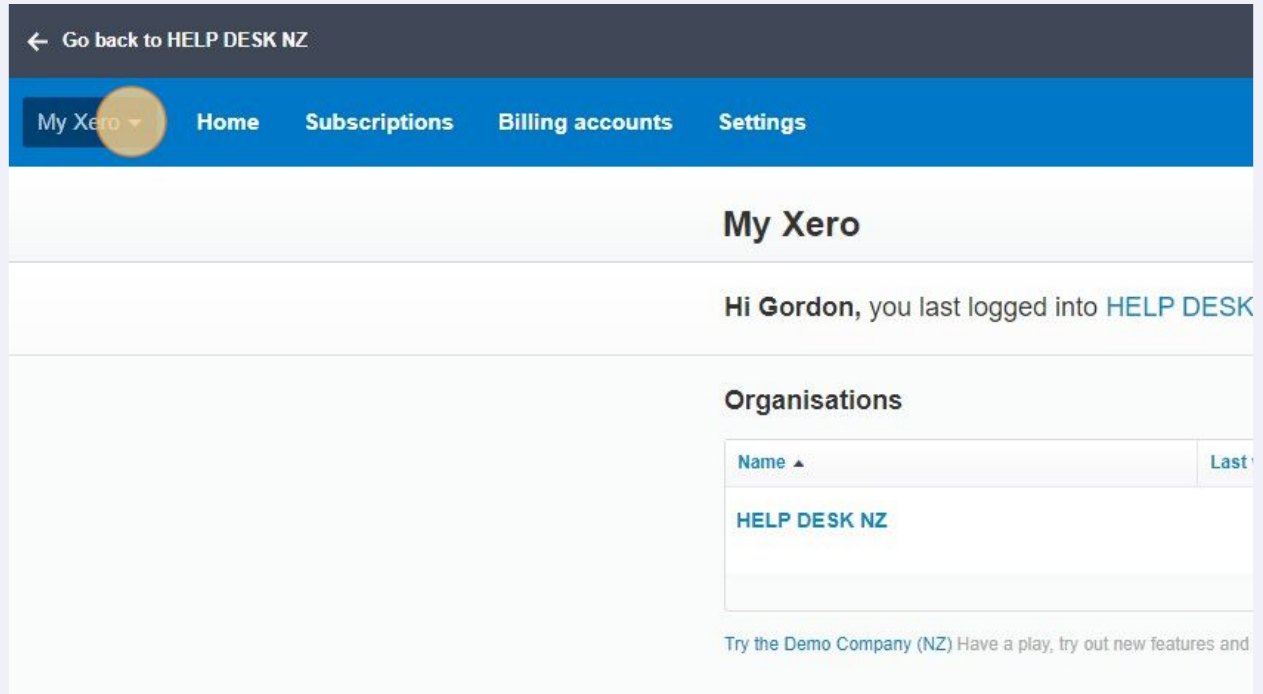


3 This is the Xero Settings page. You will need to copy and paste information between this page and your Xero account for the Integration to work. This is a once only setup process, so once done you won't have to do it again.



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 your 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 than one Xero Account, choose the company from Xero drop down list that you wish to integrate.



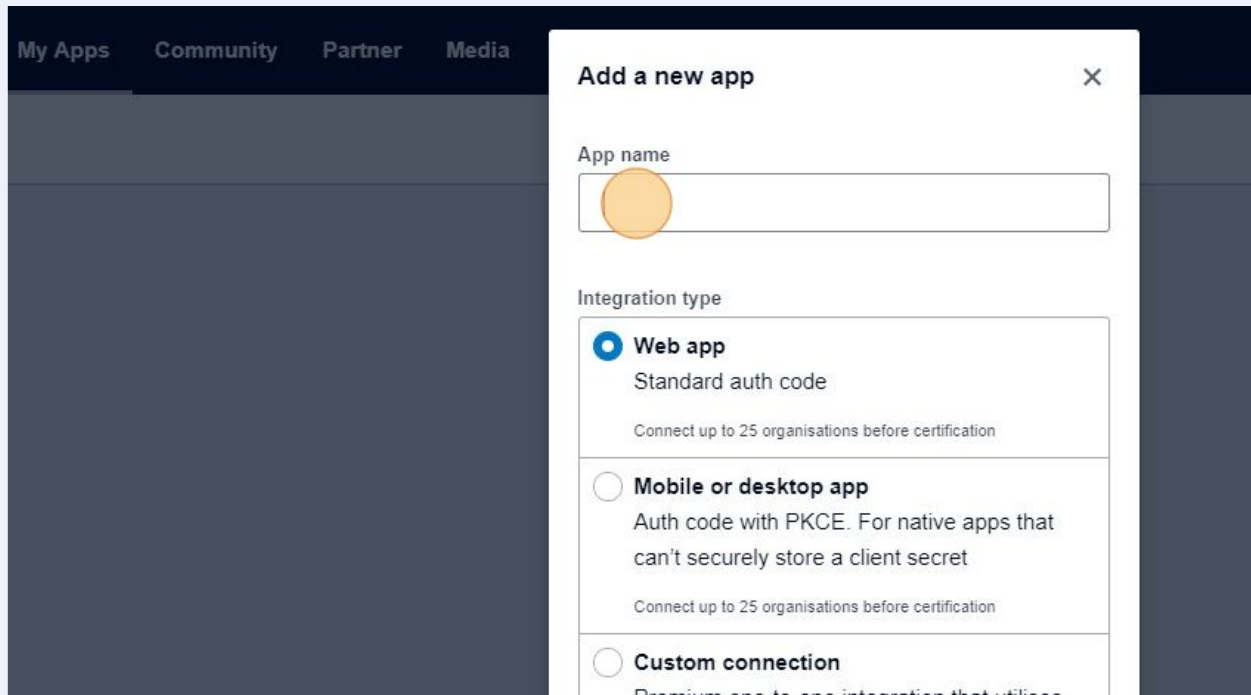
5 in "My-Xero" Click "New app"



You haven't added any apps yet. Add an app to get started.



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



The screenshot shows the 'Add a new app' dialog box in the Xero interface. The dialog has a dark blue header with the title 'Add a new app' and a close button (X). Below the header, there is a text input field for 'App name' with a yellow circle icon. Underneath, the 'Integration type' section contains three radio button options: 'Web app' (selected), 'Mobile or desktop app', and 'Custom connection'. Each option has a brief description and a note about connecting up to 25 organisations before certification.

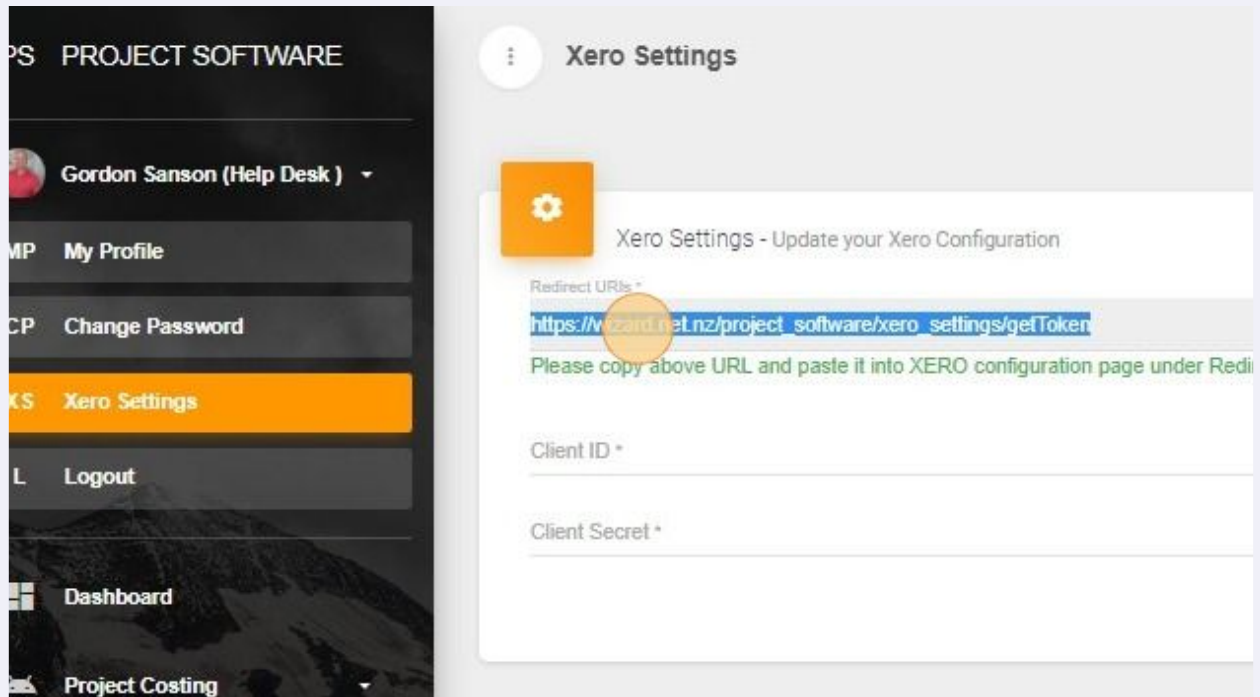
Add a new app X

App name

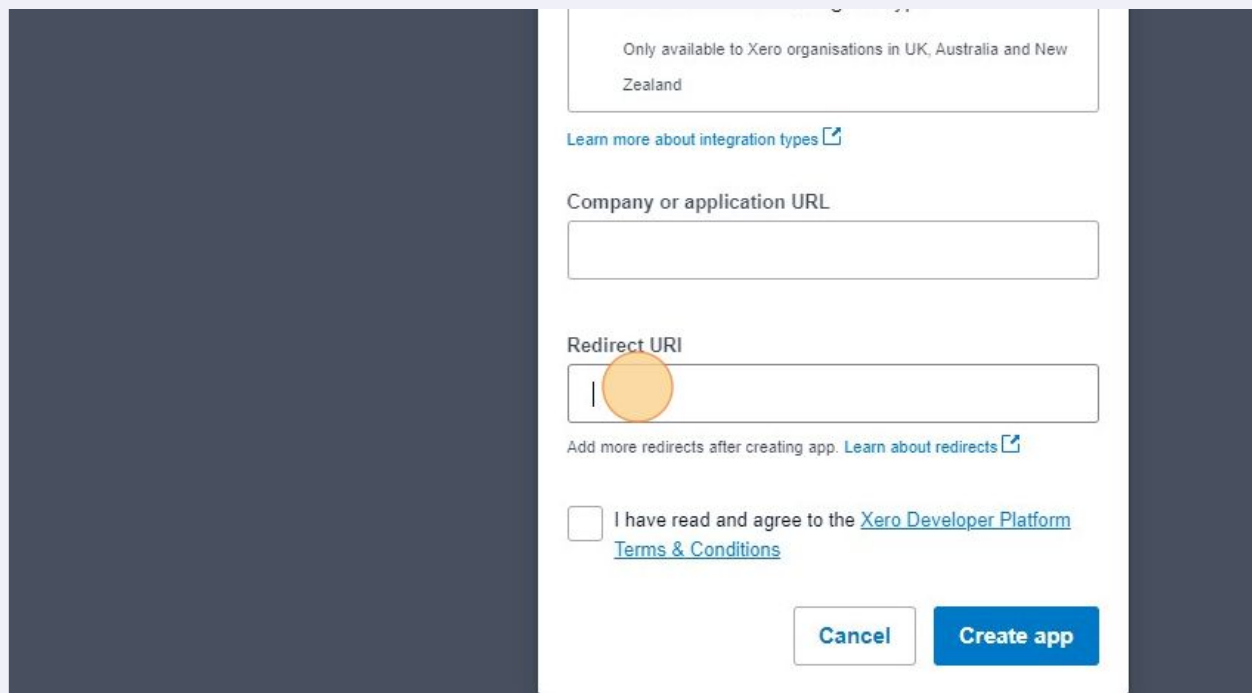
Integration type

- ☒ **Web app**
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

- 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"

The screenshot shows the 'Add a new app' form in the Xero Developer Platform. The form is titled 'Add a new app' and has a close button (X) in the top right corner. It contains the following fields and options:

- App name:** A text input field with the placeholder text 'Any Name Here'.
- Integration type:** A section with three radio button options:
 - Web app:** Selected. Description: 'Standard auth code. Connect up to 25 organisations before certification.'
 - Mobile or desktop app:** Description: 'Auth code with PKCE. For native apps that can't securely store a client secret. Connect up to 25 organisations before certification.'
 - Custom connection:** Description: 'Premium one-to-one integration that utilises the client credentials grant type. Only available to Xero organisations in UK, Australia and New Zealand.'
- Learn more about integration types:** A link with an external icon.
- Company or application URL:** A text input field with the value 'https://wizard.net.nz'.
- Redirect URI:** A text input field with the value 'https://wizard.net.nz/project_software/xero_setin'.
- Add more redirects after creating app:** A link with an external icon.
- I have read and agree to the Xero Developer Platform Terms & Conditions:** A checked checkbox with a link to the terms and conditions.
- Buttons:** 'Cancel' and 'Create app' (highlighted with an orange circle).

10

The App is Created.

The screenshot shows the 'Connection' page for the newly created app. The page is titled 'Connection' and has a subtitle '0 of 25 connections' with an information icon (i). It contains the following fields and options:

- Redirect URIs:** A text input field with the value 'https://wizard.net.nz/project_software/xero_settings/get'. Below it is a link 'Learn about redirects' with an external icon.
- Add another URI:** A link.
- Client id:** A text input field with the value 'A8.....5A'. To the right of the field is an eye icon and a 'Copy' button (highlighted with an orange circle).
- Generate a secret:** A link.
- Login URL for launcher (optional):** A text input field.
- URL will be used by launcher to log in to app:** A link 'Find out about launcher' with an external icon.

11 Click "Generate a secret"

Connection
0 of 25 connections ⓘ

Redirect URIs

[Learn about redirects](#) ⓘ

[Add another URI](#)

Client id

ⓘ [Copy](#)

[Generate a secret](#)

Login URL for launcher (optional)

URL will be used by launcher to log in to app. [Find out about launcher](#) ⓘ

12 Click "Copy" Client ID

Redirect URIs

[Learn about redirects](#) ⓘ

[Add another URI](#)

Client id

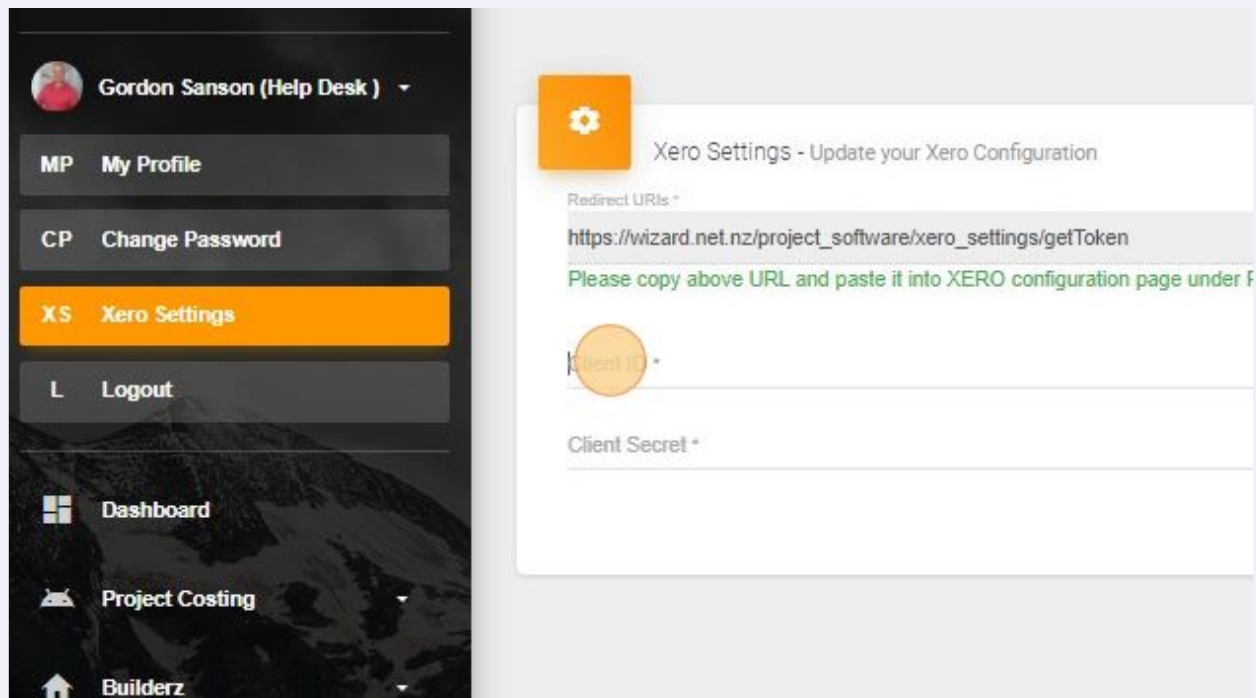
ⓘ [Copy](#)

Client secret 1

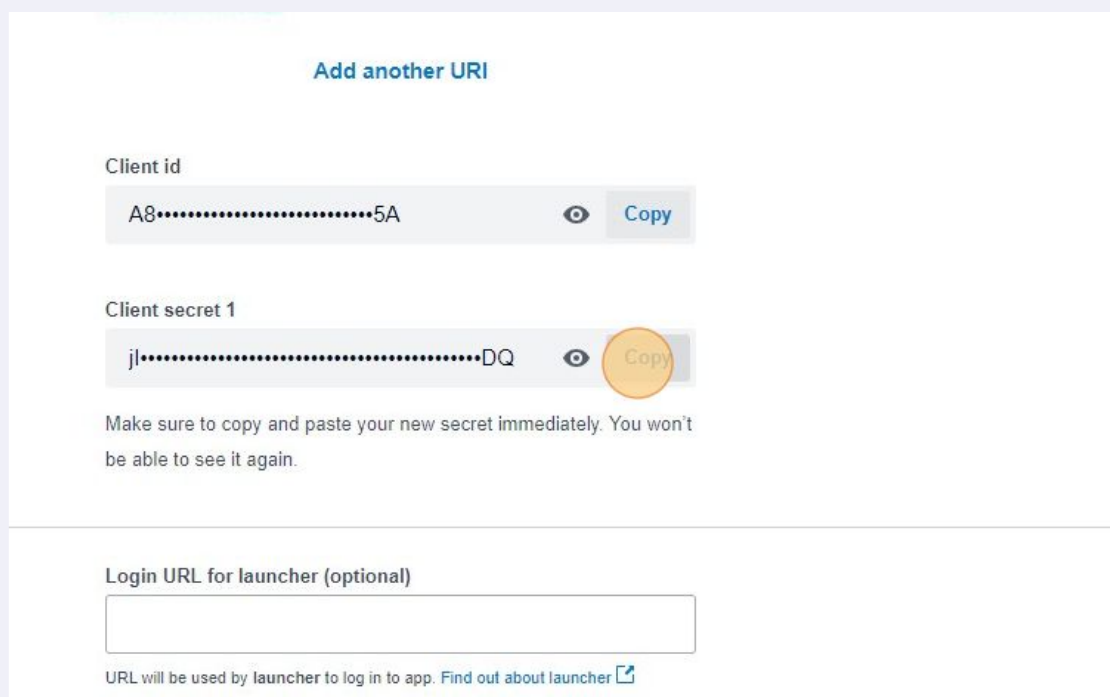
ⓘ [Copy](#)

Make sure to copy and paste your new secret immediately. You won't be able to see it again.

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

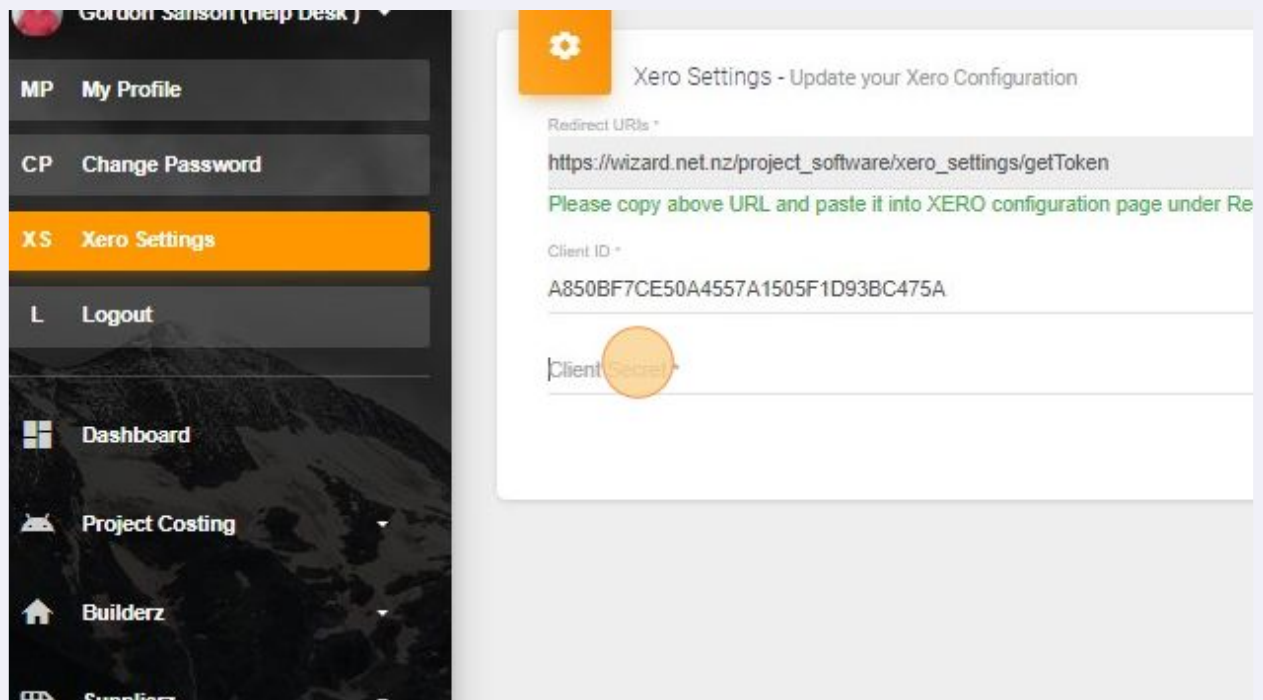


- 14 Now, from the Xero App copy the "Client Secret 1"



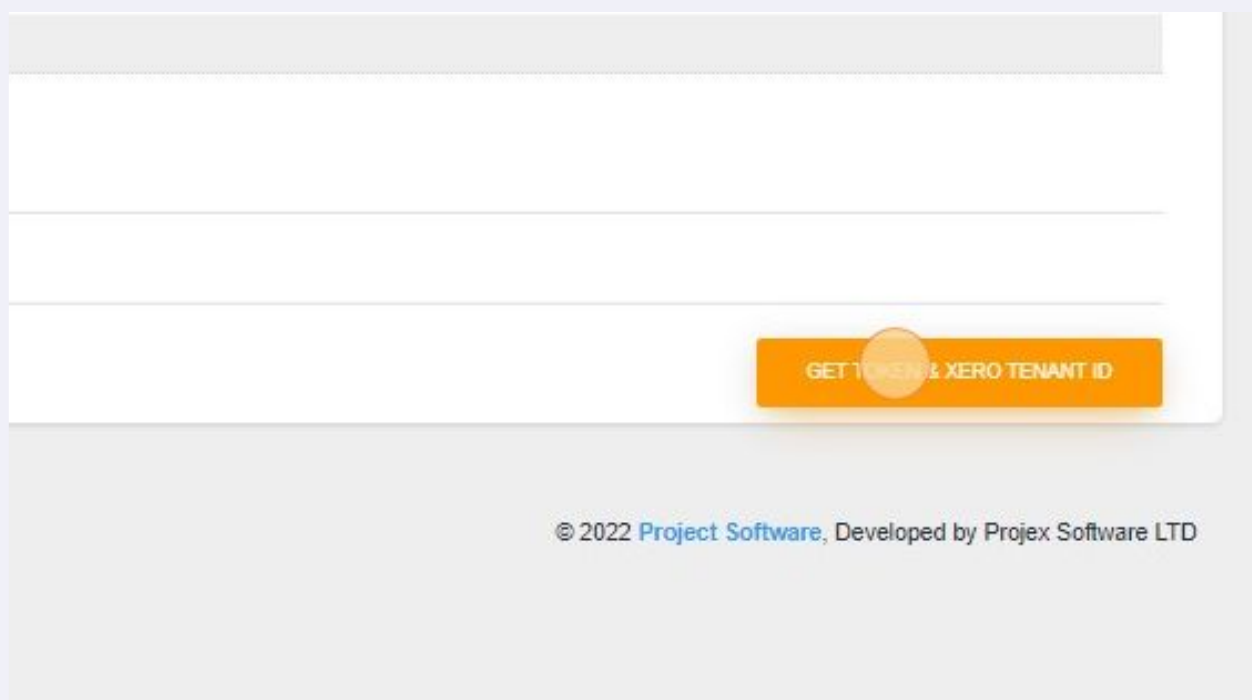
15

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

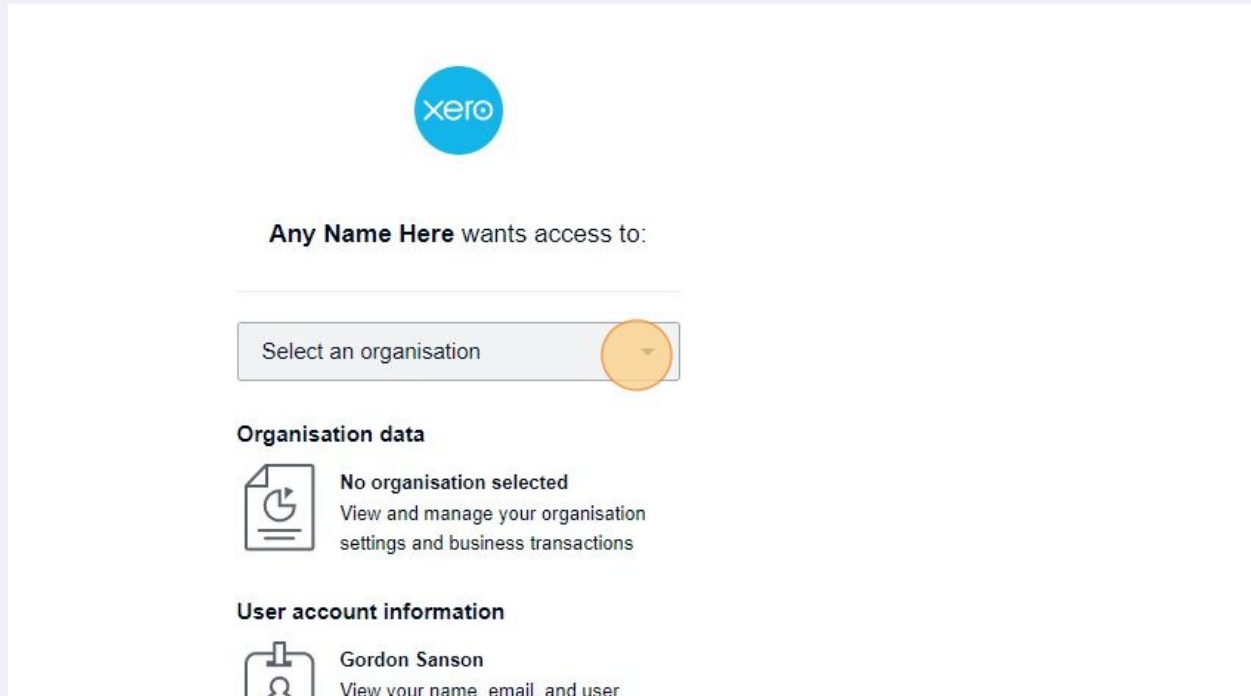


16

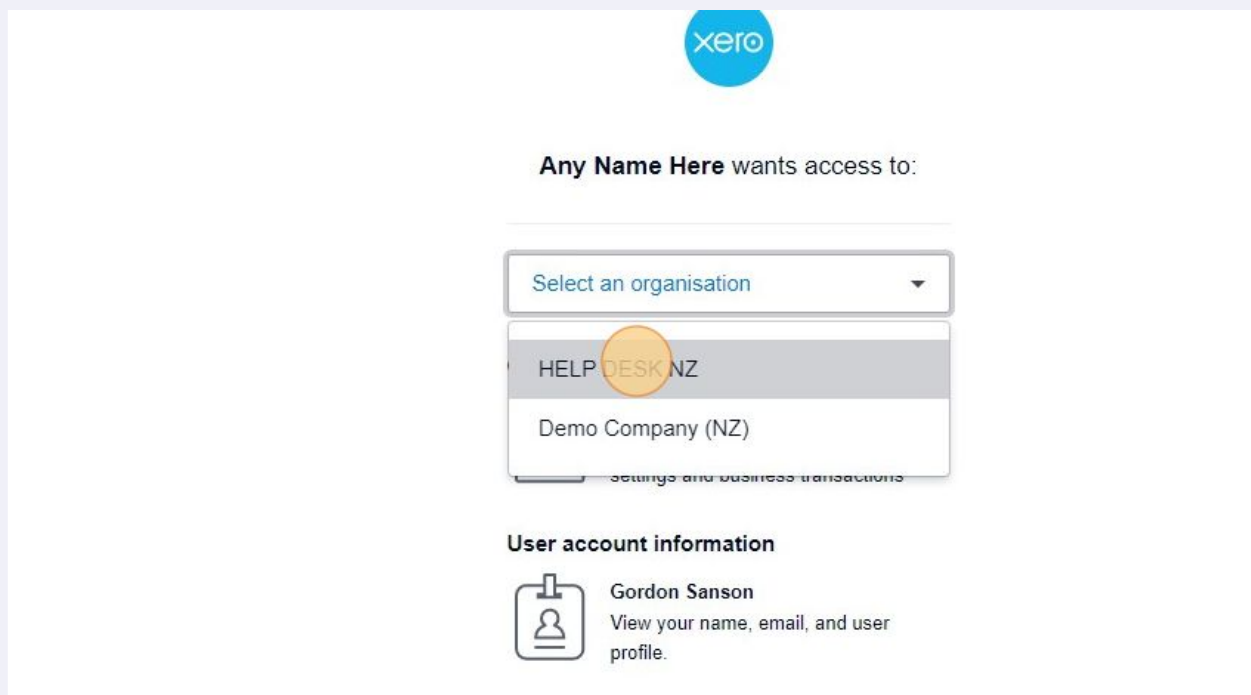
Now Click "GET TOKEN XERO TENANT ID"



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



18 Choose your Xero account name for the integration.



19

Click "Allow access"



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.

Allow access

Cancel

20

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



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21

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

