# Accounting Channels

Documents about obtaining API credentials of Accounting Channels and adding them to your Channels account.

- Xero
- Sage
- QuickBooks Online

# Xero

## Overview

Xero, a cloud-based accounting software, aids small and medium-sized businesses oversee financial tasks such as invoicing, payroll, expense tracking, and reporting. This document will guide you through the process of installing the Xero accounting channel on Channels.

## Obtaining the Credentials from Xero

For instructions on acquiring credentials from Xero, please refer to our specialized Xero documentation page available **here**.

## Installing Xero on Channels

1. Navigate to the "Stores" page by selecting the "Stores" button in the left-hand menu.
2. You can edit your store details by clicking the pen icon on the right side below the "Actions" section. For a comprehensive understanding of store functionalities, consult our dedicated documentation page, available **here**.
3. Access the "Accounting Channel" tab at the screen's top.
4. Add an accounting channel by clicking the "+ Add" button on the accounting channel page.
5. Choose "Xero" from the list of accounting channels.
6. Provide the necessary details as outlined below and click "Save":
    - **Channel Name:** Specify the name for this integration.
    - **Account Nominal Code:** For customers using our Billing API, obtain this number through the Billing API. You can disregard this field if you are not a Billing API customer.
    - **Client ID and Client Secret:** Input the obtained Xero developer account credentials into their respective fields.
    - **Add Products to Xero:** Enable this option to send system-created products to Xero.
    - **Create Nonexistent Products:** Record products in created invoices as the main product if not available on Xero.
7. Finalize the integration by clicking the "Connect" button between Xero and Channels.
8. Confirm the connection on the Xero page by clicking "Allow access" to proceed.
9. Congratulations! Your channel is now successfully connected. Click "Continue" to return to Channels.
10. Activate the Xero channel by toggling the switch in the "Is Active" section at the top of the page; ensure it is turned on for proper functionality, as deactivation will render it inactive.

# Sage

## Overview

Sage's e-commerce solutions offer integrated tools for efficient financial management, multi-channel selling, and secure online transactions. With features like inventory management, analytics, CRM integration, and scalability options, Sage aims to enhance online businesses' efficiency and customer experience. This document will guide you through the process of installing the Sage accounting channel on Channels.

## Installing Sage on Channels

1. Navigate to the "Stores" page by selecting the "Stores" button in the left-hand menu.
2. You can edit your store details by clicking the pen icon on the right side below the "Actions" section. For a comprehensive understanding of store functionalities, consult our dedicated documentation page, available here.
3. Access the "Accounting Channel" tab at the screen's top.
4. Add an accounting channel by clicking the "+ Add" button on the accounting channel page.
5. Choose "Sage" from the list of accounting channels.
6. Provide the necessary details as outlined below and click "Save":
    - **Channel Name:** Specify the name for this integration.
    - **Account Nominal Code:** For customers using our Billing API, obtain this number through the Billing API. You can disregard this field if you are not a Billing API customer.
    - **Region:** Choose the country in which your Sage account is registered.
    - **Add Products to Sage:** Enable this option to send system-created products to Sage.
    - **Create Nonexistent Products:** If not available on Sage, record products in created invoices as the main product.
7. Finalize the integration by clicking the "Connect" button between Sage and Channels.
8. Log in and confirm the connection on the Sage page to proceed.
9. Congratulations! Your channel is now successfully connected. Click "Continue" to return to Channels.
10. Activate the Sage channel by toggling the switch in the "Is Active" section at the top of the page; ensure it is turned on for proper functionality, as deactivation will render it inactive.

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# QuickBooks Online

## Overview

QuickBooks Online effectively integrates diverse e-commerce sales channels, automating data synchronization and providing robust tools for inventory tracking and financial management. Users can efficiently manage transactions, monitor expenses, and gain real-time insights, enhancing overall accounting processes and financial visibility for their online businesses.

This document will guide you through the process of installing the QuickBooks accounting channel on Channels.

## Installing QuickBooks Online on Channels

1. Navigate to the "Stores" page by selecting the "Stores" button in the left-hand menu.
2. You can edit your store details by clicking the pen icon on the right side below the "Actions" section. For a comprehensive understanding of store functionalities, consult our dedicated documentation page, available here.
3. Access the "Accounting Channel" tab at the screen's top.
4. Add an accounting channel by clicking the "+ Add" button on the accounting channel page.
5. Choose "QuickBooks Online" from the list of accounting channels.
6. Provide the necessary details as outlined below and click "Save":
    - **Channel Name:** Specify the name for this integration.
    - **Account Nominal Code:** For customers using our Billing API, obtain this number through the Billing API. You can disregard this field if you are not a Billing API customer.
    - **Add Products to QuickBooks Online:** Enable this option to send system-created products to QuickBooks Online.
    - **Create Nonexistent Products:** If not available on QuickBooks Online, record products in created invoices as the main product.
    - **Product Type:** With "Create Nonexistent Products" enabled, you can choose the product's saving method. Options include "Non Inventory," "Inventory," and "Service."
7. Finalize the integration by clicking the "Connect" button between QuickBooks and Channels.
8. Log in and confirm the connection on the QuickBooks page to proceed.
9. Congratulations! Your channel is now successfully connected. Click "Continue" to return to Channels.
10. Activate the QuickBooks channel by toggling the switch in the "Is Active" section at the top of the page; ensure it is turned on for proper functionality, as deactivation will render it inactive.