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.



Revision #1
Created 31 May 2024 09:39:44 by Despatch Cloud
Updated 31 May 2024 09:40:03 by Despatch Cloud