

2. Xero Integration User Guide

Thank you for purchasing our extension. If you have any questions that are beyond the scope of this document, do not hesitate to leave us an email via support@magenest.com

By: Magenest | Support Portal: <http://servicedesk.izysync.com/servicedesk/customer/portal/26>

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Introduction

Xero Integration extension for Magento 2 is a great tool that allows you to synchronize accounting data automatically from Magento 2 store to Xero Website.



Features

- Sync customer data from Magento 2 store to Xero both manually and automatically.
- Sync product data from Magento 2 store to Xero both manually and automatically.
- Sync order data from Magento 2 store to Xero both manually and automatically.
- Sync invoice data from Magento 2 store to Xero both manually and automatically.
- Sync Credit Memos from Magento 2 store to Xero both manually and automatically.
- Allow admin to view sync history log to see what is synchronized between two apps.
- Allow admin to manage the sync queue to see what will be synchronized next.
- Allow admin to request a report on the Backend of Magento 2.
- Support multiple-website
- Add to queue mass action in customer listing, product listing, order/invoice listing, and credit memo listing
- Sync to Xero mass action in customer listing, product listing, order/invoice listing, and credit memo listing

System Requirements

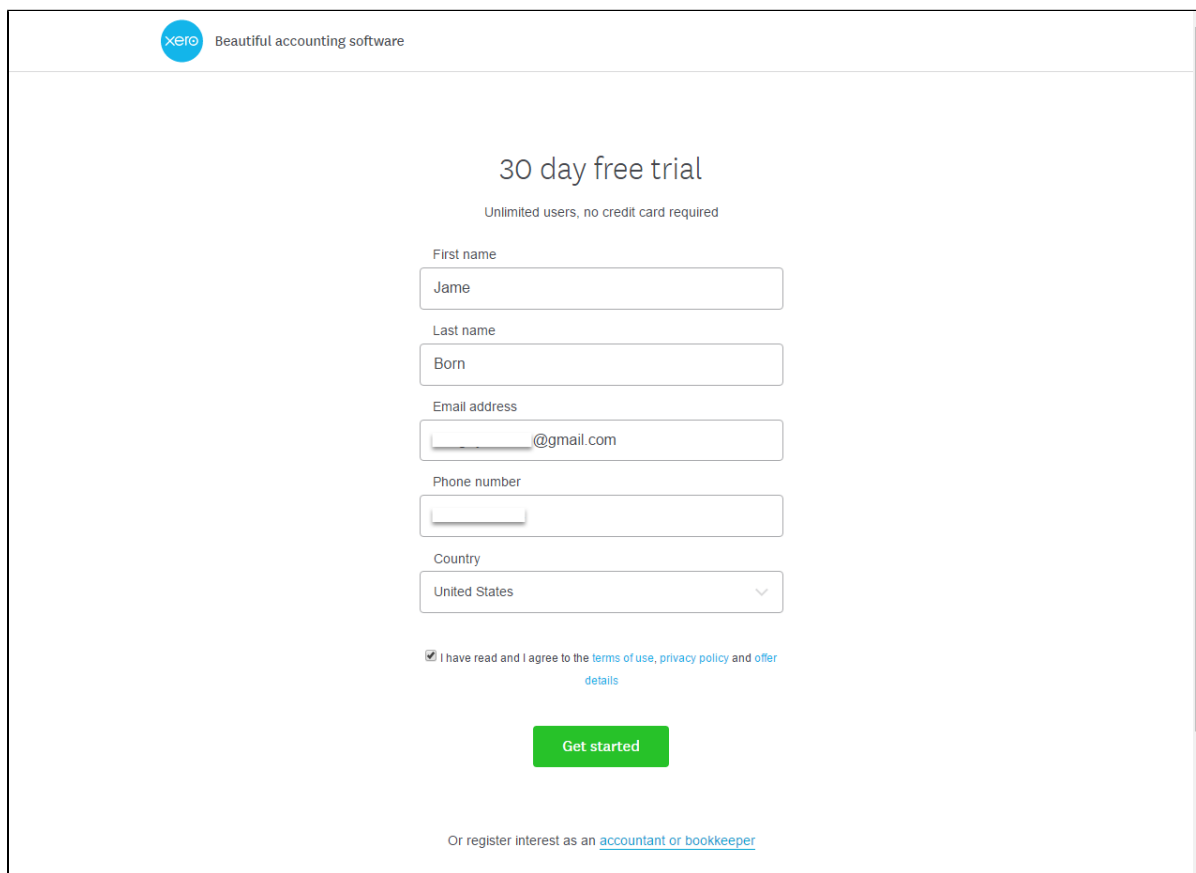
Your store should be running on **Magento 2 Community Edition version 2.3.x and 2.4.x**

How to create a new consumer key

Video Tutorial

First, you need to create a Xero consumer key to connect from Magento 2 to Xero if you haven't got one. Go to <https://www.xero.com/> and register a Xero accounts (click on "Try Xero for free" or "Free Trial").

Fill in the required information click on "Get started". If everything goes right, Xero sends you an account activation email.



The screenshot shows the Xero website's registration page for a 30-day free trial. At the top, the Xero logo and tagline "Beautiful accounting software" are visible. The main heading is "30 day free trial" with the subtext "Unlimited users, no credit card required". Below this, there are several input fields: "First name" (containing "Jame"), "Last name" (containing "Born"), "Email address" (containing a redacted email followed by "@gmail.com"), "Phone number" (containing a redacted number), and "Country" (a dropdown menu set to "United States"). A checkbox is checked, indicating agreement to the terms of use, privacy policy, and offer details. A prominent green "Get started" button is centered below the form. At the bottom, there is a link to "Or register interest as an accountant or bookkeeper".

Xero Beautiful accounting software

30 day free trial

Unlimited users, no credit card required

First name
Jame

Last name
Born

Email address
[redacted]@gmail.com

Phone number
[redacted]

Country
United States

☒ I have read and I agree to the [terms of use](#), [privacy policy](#) and [offer details](#)

[Get started](#)

Or register interest as an [accountant or bookkeeper](#)

When your account is activated, you can log in on the page <https://login.xero.com/>.



Welcome to Xero

Your email or password is incorrect

Login

[Forgot your password?](#)

Better protect your Xero data with two-step authentication



▶ Play video

[Learn More](#)

Don't have a login? [Try Xero for free](#)

[Terms of use](#) [Privacy](#)

If you log in to the account for the first time, Xero will ask you to create an organization. Enter the details of your organization. Press on Start Trial, or Buy Now to continue.



Logout

Add your organization to start using Xero now

What is the name of your organization?

Where does your organization pay taxes?

United States

What is your time zone?

(UTC-05:00) Eastern Time (US & Cana

What does your organization do?

Currently using QuickBooks?[Convert your QuickBooks file for free](#)

Start Trial

 or

Buy Now

[Try the Demo Company \(US\)](#) Have a play, try out new features and get familiar with Xero.

Now you can create a new consumer key for Xero account. There are two types of Application Mode you can choose: **Private Application Mode** or **Public Application Mode**

For Private Application Mode

In order to create a new consumer key for private app mode, you need to have the public key first. There are two ways for you to get the public key:

- + You can use the public key file attached to our extension.
- + Or please follow the steps below to create a new one:

Go to <http://developer.xero.com/> > Docs then search with **Create a public/private key pair**

XERO DEVELOPER Docs SDKs Previewer My Apps Community Partner Media

1

2

Q Create a public/private key pair

Search Results for 'Create a public/private key pair'

About 7 results (0.72 seconds)

3

[Create a public/private key - How-to Guides | Xero Developer](#)

Private and Partner applications must sign messages using the OAuth RSA- SHA1 method. This requires that you **create a public/private key-pair**, and upload the ...

[Private Applications - Auth and Limits | Xero Developer](#)

Private applications use the RSA-SHA1 signature method. You will need to **generate a public/private key-pair**, of which the public part will be uploaded to Xero ...

[OAuth Issues - Auth and Limits | Xero Developer](#)

Resolution: **Create** a new connection with the new demo company, or in the ... This can be encountered if the **public private key pair** X509 certificate used for ...

[Entrust Certificate Deprecation - Auth and Limits | Xero Developer](#)

... Optional: Remove Entrust SSL certificates when **creating** an instance of http ... at http://app.xero.com and continue using the same **public/private key pair** for ...

[Partner Applications - Auth and Limits | Xero Developer](#)

Partner applications are public applications that have been upgraded to support long term access ... To do this you need to **generate a public/private key pair**.

[Development accounts - Getting Started | Xero Developer](#)

Below is a rundown of the **key** differences between the demo company and a Xero trial organisation. Xero trial ... If you're using a **Private** application you will need to **setup** the application as per usual. When the ... **Public** & Partner Applications.

[API Application Types - Getting Started | Xero Developer](#)

Xero has three types of API applications: **Private**, **Public** and Partner. The authorisation process is different depending on the type of application you use The ...

1

Dev Blog
News and Updates from the team

Roadmap
See what we're working on next

GitHub
Find our SDKs and other source code

Questions
Ask about our API on Stack Overflow

API Status Terms Privacy

Create a public/private key pair page appears as below. Follow the user guide of Xero to get 2 file: **public key(.cer)** and **private key(.pem)**.

The screenshot shows the Xero Developer documentation page for creating a public/private key pair. The page has a dark header with navigation links: XERO DEVELOPER, Docs (highlighted), SDKs, Previewer, My Apps, Community, Partner, and Media. A left sidebar contains a 'How-to Guides' dropdown and a list of guides, with 'Create a public/private key' selected. The main content area is titled 'Create a public/private key pair' and includes an 'Overview' section explaining the OAuth RSA-SHA1 method and the need for an application certificate. It provides instructions for Windows users (downloading OpenSSL and running commands) and Mac users (using Terminal). A code block shows the OpenSSL commands to generate a private key, a public key certificate, and export them as a pfx file. A note mentions that Java libraries may require the private key in PKCS8 format. The page concludes with a reminder to note the certificate's expiry date.

XERO DEVELOPER Docs SDKs Previewer My Apps Community Partner Media

How-to Guides

Integration Best Practices

Certification Checklist

Branding Your Integration

Deep link to Xero

Create a public/private key

Rounding in Xero

Accounting for Inventory

Xero Tracked Inventory

Processing Payments

Conversions Guide

CRM and Xero

Create a public/private key pair

Overview

Private and Partner applications must sign messages using the OAuth RSA-SHA1 method.

This requires that you create a public/private key-pair, and upload the public certificate during application registration. We refer to this certificate as an application certificate.

To get started with creating a public/private key-pair we recommend the use of [OpenSSL](#).

Windows users

[Download OpenSSL for Windows](#)

To run the commands below, go to the OpenSSL32 directory on your PC, and change to the /bin directory.

Notes:

- You may need to open the command prompt with admin privileges (Run as administrator)
- If OpenSSL has just been installed, you might need to restart your computer before it can generate certs

Mac users

OpenSSL comes shipped with Mac OS X version 10.6.2 onwards. You can use Terminal to run OpenSSL (search for 'terminal' using the search bar in the top right of your screen on your desktop) to open the terminal window and then run the commands below.

Notes:

- You may need to run each OpenSSL command lines with elevated privileges - add `sudo` before each command lines

Using OpenSSL

The basics command line steps to generate a private and public key using OpenSSL are as follows:

```
openssl genrsa -out privatekey.pem 1024
openssl req -new -x509 -key privatekey.pem -out publickey.cer -days 1825
openssl pkcs12 -export -out public_privatekey.pfx -inkey privatekey.pem -in publickey.cer
```

- Step 1: generates a private key
- Step 2: creates a X509 certificate (.cer file) containing your public key which you upload when registering your private application (or upgrading to a partner application).
- Step 3: Export your x509 certificate and private key to a pfx file. If your chosen wrapper library uses the .pem file to sign requests then this step is not required.

Note: If you are using Java libraries which require extracting the private key in PKCS8 format, please refer [here](#).

Please make a note of the expiry date of your certificate as you will need to upload a replacement in the Xero Developer Center before the expiry date to ensure uninterrupted service.

When you have file **public key.cer**, please go to <https://app.xero.com/Application> to create the Application.

Choose **Private** application mode, application name (the name for the application is not very important), choose your organization (this is where the Magento 2 data will be synced into). You need to copy and paste the content or upload the file **Public key.cer** into **X509 Public Key Certificate** field.

Check the information again then choose "I have read and agree to the Xero Developer Platform". After that click **Save** button.

DEVELOPER
Docs
SDKs
Previewer
My Apps
History
Community
Partner
Media

My Applications
Add an Application

Getting started with the Xero Developer Platform
Hide Getting Started

Watch the API tour (2 minutes long)

- Try the Accounting API Previewer or the Payroll API Previewer to see the API in action
- Register your own application
- Refer to our Developer Centre for our API Reference and code samples
- Review the developer platform terms and conditions before using Xero developer platform features.

Setup an Application

Are you developing a Public or Private application?

☐ Public - for use with any organisation that authorises you

☒ Private - just for use with my own organisation

Application Name

Test for private app mode

Please select which organisation your application can access:

Magenest

X509 Public Key Certificate

☐ Paste In

☒ Upload X509 certificate file (.cer)

Browse... publickey.cer

☐ Enable Payroll API for this organisation

☒ I have read and agree to the Xero Developer Platform Terms & Conditions

Save Cancel

What is the difference between a Public and Private app?

Read our guide on adding an application on the Xero Developer Centre site.

Why do I need an X509 Public Key Certificate?

When using a private application, all calls to the Xero API must be signed using RSA-SHA1.

An X509 Certificate (containing the public key only) will need to be uploaded to Xero so that we can use this to verify the source of your API calls.

Read our guide on adding an application on the Xero Developer Centre site to learn more about creating a X509 public key certificate.

See the Xero Developer Centre for more information on OAuth authentication.

If everything goes right, you will see the following content. Click on the "Show" button to get the **Consumer Key** for **Private App Mode**.

DEVELOPER
Docs
SDKs
Previewer
My Apps
History
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Media

My Applications
Edit Application

Your application details have been updated
Application added

Edit Details

Application Name

Test for private app mode

Selected Organisation:

Magenest

X509 Public Key Certificate

Subject

O=Internet Widgits Pty Ltd, S=Some-State, C=AU

Valid From

6/1/2017 3:05:05 AM UTC

Valid To

5/31/2022 3:05:05 AM UTC

Thumbprint

FDBB1C2F739E5EEE5995D295E9B5812D65E5B841

Upload a new Public Key Certificate

☒ I have read and agree to the Xero Developer Platform Terms & Conditions

Delete... Save Cancel

OAuth Credentials

Consumer Key

D9*****R1 Show

Consumer Secret

41*****KS Show

Regenerate Key and Secret

Note, For Private applications, the consumer token and secret are also used as the access token and secret.

API Endpoint URL:

https://api.xero.com/api.xro/2.0/

For Public Application Mode

Navigate to <https://app.xero.com/Application> to create the Application for Public Mode. You just need to enter Application Name, Url of your company or product and OAuth callback domain. Then **Save** button to finish.

The screenshot shows the 'Add an Application' page on the Xero Developer Platform. The page has a dark header with navigation links: DEVELOPER, Docs, SDKs, Previewer, My Apps (active), History, Community, Partner, and Media. Below the header, there's a 'My Applications' breadcrumb and a title 'Add an Application'. A green banner at the top says 'Getting started with the Xero Developer Platform' with a 'Hide Getting Started' button. Below this is a video player for 'Watch the API tour (2 minutes long)' and a list of links: 'Try the Accounting API Previewer or the Payroll API Previewer to see the API in action', 'Register your own application', 'Refer to our Developer Centre for our API Reference and code samples', and 'Review the developer platform terms and conditions before using Xero developer platform features.' The main form is titled 'Setup an Application' and contains the following fields and options:

- Are you developing a Public or Private application?**
 - ☒ Public - for use with any organisation that authorises you
 - ☐ Private - just for use with my own organisation
- Application Name**
Text input field with placeholder 'Test for public app mode'.
- URL of your company or product**
Text input field with placeholder 'http://xero.demo.izysync.com'.
- OAuth callback domain** (optional)
Text input field with placeholder 'xero.demo.izysync.com'. Below it is a link 'Callback domains explained'.
- ☒ I have read and agree to the Xero Developer Platform [Terms & Conditions](#)

At the bottom of the form are 'Save' and 'Cancel' buttons. To the right of the form, there are two informational sections:

- What is the difference between a Public and Private app?**
Read our guide on [adding an application](#) on the Xero Developer Centre site.
- What is the OAuth callback domain for?**
This is used to validate the oauth_callback parameter when requesting a request token. All callback URLs should reside within the specified domain. If you do not specify a domain we will ignore the oauth_callback parameter and show the verification code to the current user.
If you have previously specified a callback URL, we will continue to use this URL if you don't specify a oauth_callback parameter. However, if you specify a oauth_callback parameter, we will check that the url in the parameter is within the same domain as your registered callback URL.
For further information, see this [developer centre article](#).
- OAuth Signature Method**
When using a public application all calls need to be signed using HMAC-SHA1. Access tokens for public applications last 30 minutes. If you complete the steps to become a Xero Network partner and your solution is web based then you can apply to use longer access tokens.

Last, click on **Show** button to take **Consumer Key** and **Consumer Secret** for **Public App Mode**.

Configuration

Set up Xero Account Informations

Go to **Store > Configuration** or **Xero Integration > Configuration**:

DEVELOPER

Docs

SDKs

Previewer

My Apps

History

Community

Partner

Media

W

My Applications

Edit Application

✓

Your application details have been updated

Edit Details

Application Name

Test for public app mode

URL of your company or product

http://xero.demo.izysync.com/

OAuth callback domain (optional)

xero.demo.izysync.com

Callback domains explained

☒ I have read and agree to the Xero Developer Platform Terms & Conditions

Delete...

Save

Cancel

OAuth Credentials

Consumer Key

E5*****VC

Show

Consumer Secret

G5*****DZ

Show

Regenerate Key and Secret

OAuth Request URLs

Request Token URL:

https://api.xero.com/oauth/RequestToken

Authorise URL:

https://api.xero.com/oauth/Authorize

Access Token URL:

https://api.xero.com/oauth/AccessToken

API Endpoint URL:

https://api.xero.com/api.xro/2.0/

At My Applications tab

Taking **Consumer Key** that you have just created above and paste into Magento 2 backend configuration. Press **Save Config** after you've done (refresh the cache if needed). Then, click on **Connect Private App Now** button for private application mode or **Connect Public App Now** button for public application mode.



Note

You need to save config before connecting, this will help you avoid making errors.

Setting My Applications in Configuration of your Magento 2 store will base on their app mode types.

Private App Mode:

If you choose **Private** mode, you will have to enter the content of **Private Key(.pem)** and **Public Key(.cer)** beside **Consumer Key**

The screenshot shows the Magento 2 Configuration page for Xero integration. The left sidebar contains navigation links: DASHBOARD, SALES, PRODUCTS, CUSTOMERS, MARKETING, CONTENT, INTEGRATION (highlighted with a red box), STORES, and SYSTEM. The main content area is titled "Configuration" (circled in green) and shows the "Xero Account Informations" section. The "Store View" is set to "Default Config". A "Save Config" button is in the top right. The "Xero" section is expanded, showing "CUSTOMERS", "SALES", "SERVICES", and "ADVANCED" sub-sections. The "Xero Account Informations" section displays the following fields:

- Connection Status** [global]: NOT CONNECTED (in a red box)
- Consumer Key** [global]: (text input field)
- App Mode** [global]: Private (dropdown menu)
- Warning**: This version only supports Public & Private App [Learn More](#)
- Public Key(.cer)** [global]: (text input field)
- Private Key(.pem)** [global]: (text input field)

Below the key fields, there are links: "To learn how to create a public/private key pair, [click here](#)". At the bottom, there is a button "Connect Private App Now" and a note: "Please save configuration before Connect".

Public App Mode:

If you choose **Public** mode, it will require both **Consumer Secret** and **Consumer Key**. The expiration for each connection time is 30 minutes. After that, you need to reconnect Magento 2 store to your Xero account.

Configuration

Store View: Default Config ? Save Config

GENERAL **CATALOG** **MAGENEST**

Xero

CUSTOMERS **SALES** **SERVICES** **ADVANCED**

Xero Account Informations

My Applications [Learn More](#)

Connection Status [global] **NOT CONNECTED**

Consumer Key [global]

Consumer Secret [global]

App Mode [global] Public

Warning: This version only supports Public & Private App [Learn More](#)

Connect Public App Now

Please save configuration before Connect

When Magento 2 store is connected with your Xero account successfully, connection status will be transferred from *not connected* to *connected* as below:

Configuration

Store View: Default Config ? Save Config

GENERAL **CATALOG** **MAGENEST**

Xero

CUSTOMERS **SALES** **SERVICES** **ADVANCED**

Xero Account Informations

My Applications [Learn More](#)

Connection Status [store view] **CONNECTED**

Account Information [store view]

UserID	58dae05d-ca2d-4792-ab3e-895dc13ddf83
EmailAddress	support@magenest.com
FirstName	William
LastName	Moseley
UpdatedDateUTC	2017-05-08T02:35:46.673
IsSubscriber	true
OrganisationRole	STANDARD

Disconnect

At Configure the Accounts Types in Xero tab

The system will take four account types in the chart of account: **Bank account, Sale account, Inventory account, Cost and Good Sold account** from Xero account into Magento 2 store. Enter the name you would like to use for each account then click on **Add all Data to Queue**. The default Xero account name will be used if you do not change it. If there is no account on Xero site, the extension will automatically create a new one.

Dashboard

Sales

Catalog

Customers

Marketing

Content

Reports

Integration

Stores

System

Find Partners & Extensions

Configuration

Store View: Default Config

Save Config

GENERAL

CATALOG

MAGENTEST

Xero

CUSTOMERS

SALES

DOTMAILER

SERVICES

ADVANCED

Xero Account Informations

My Applications

Learn More

Connection Status

Account Information

Disconnect

Account Mapping

Choose your Accounts to use in the integration.

Bank Account

Sales Account

Inventory Account

Cost of good sold Account

Synchronization Settings

Multiple Websites

Contacts

Items

Invoices

Credit Memos

Xero Integration Version

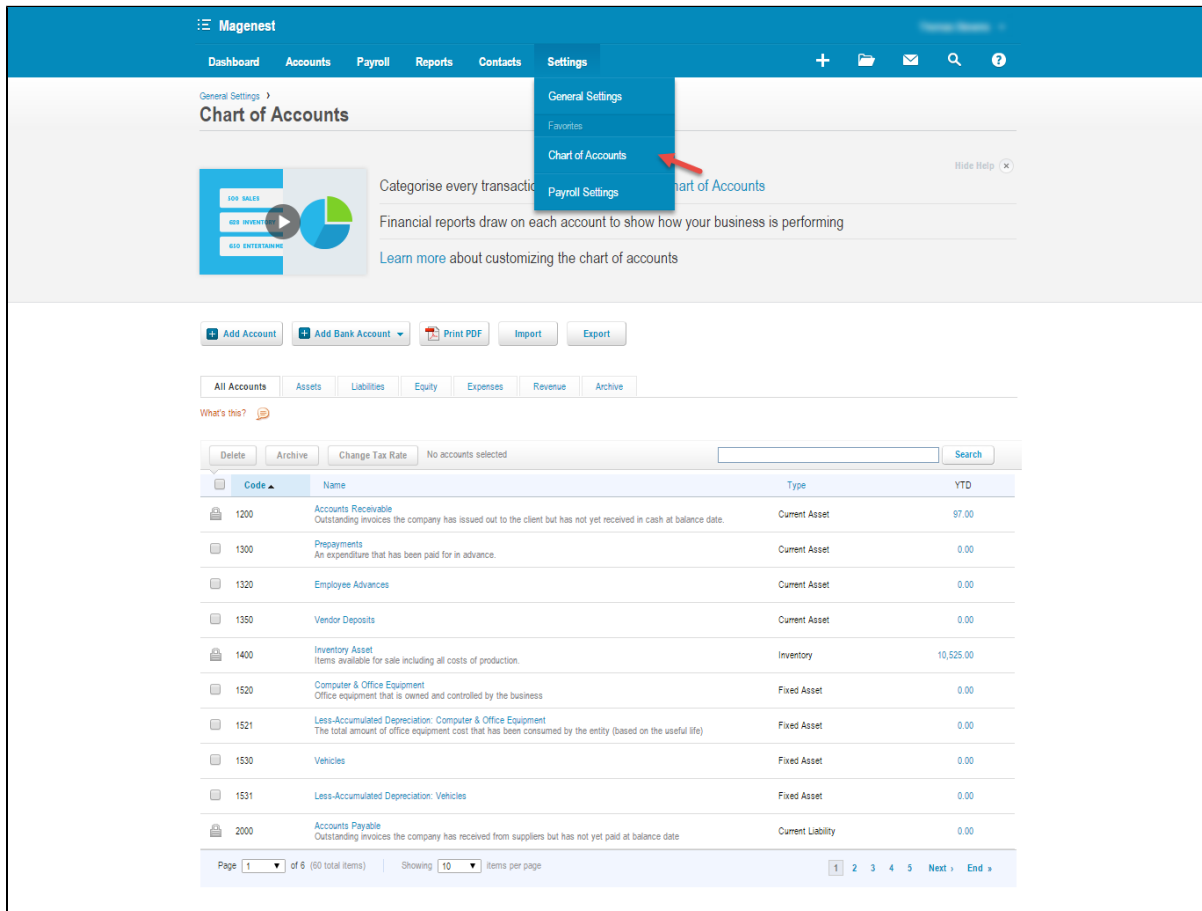
Version

Support Links

3.2.0

Installation Guide

Go to Installation Guide



Set up Synchronization

Admins are able to choose which type of data to sync from Magento 2 to Xero: **Customers, Products(Items in Xero), Orders, Invoices, Credit Memos**. In addition, admins can choose the way to synchronize data Immediately use Cron Job. Admins can also **Add All data To Queue** or add **individual data group** queue for synchronizing.

Configuration

Store View: Default Config ?

Save Config

- GENERAL
- CATALOG
- MAGENEST
- Xero
- CUSTOMERS
- SALES
- SERVICES
- ADVANCED

Xero Account Informations

Synchronization Settings

Customers

Enable [store view] Yes

Sync Mode [store view] Cron Job

Time [store view] 15 minutes

Add All Customers To Queue

Warning: Please save the configuration before syncing data

- Cron Job
- Immediately

Products(Items in Xero)

Enable [store view] Yes

Sync Mode [store view] Cron Job

Time [store view] 15 minutes

Add All Products To Queue

Warning: Please save the configuration before syncing data

- 5 minutes
- 10 minutes
- 15 minutes
- 30 minutes
- 45 minutes
- 1 hour
- 2 hours

Orders

Enable [store view] Yes

Sync Magento Order to Xero Invoice [store view] No

Sync Mode [store view] Cron Job

Time [store view] 15 minutes

Add All Orders To Queue

Warning: Please save the configuration before syncing data

Invoices

Enable [store view] Yes

Sync Mode [store view] Cron Job

Time [store view] 15 minutes

Add All Invoices To Queue

Warning: Please save the configuration before syncing data

Credit Memos

Enable [store view] Yes

Sync Mode [store view] Cron Job

Time [store view] 15 minutes

Add All Credit Memos To Queue

Warning: Please save the configuration before syncing data



How to distinguish between Immediately mode and Cron Job mode.

- **Immediately mode:** the data will be synced to Xero as soon as they're created or updated in Magento
- **Cron Job:** the data will be put into a queue and will be synced together after some intervals
- Some application mode like private mode only allows 1000 requests a day. Choosing Cron Job will guarantee all data will be synced. We recommend you use Cron Job mode to make sure that you don't run out of requests per day.

At the end of Configuration, admins can quickly navigate to the online documentation as well as support portal for Xero Integration extension:

Configuration

Store View: Default Config ? Save Config

GENERAL **Xero Account Informations**

CATALOG

MAGENEST

Xero **Version** 2.1.2

CUSTOMERS

SALES

Support Links

- Installation Guide [Go to Installation Guide](#)
- User Guide [Go to User Guide](#)
- Support Portal [Go to Support Portal](#)

Tutorial Menu

Payment Mapping

You can map the order payment method with the Xero bank account in Xero Integration > Payment Mapping

1. Update Bank Accounts
2. Choose the Xero bank account field to map
3. Save Mapping

Payment Mapping

Store View: Default Config ? Save Mapping

(Paid Orders will be transferred to the Bank Account matches that Order's Payment Method. Only enabled Payments will display here.)

Title	Code	Xero Account
No Payment Information Required	free	Default Bank Account (in Stores/Configuration)
vault	vault	Default Bank Account (in Stores/Configuration)
PayPal Billing Agreement	paypal_billing_agreement	Default Bank Account (in Stores/Configuration)
Payment by cards or by PayPal account	hosted_pro	Default Bank Account (in Stores/Configuration)
Paybox	paybox	Default Bank Account (in Stores/Configuration)
Check / Money order	checkmo	Default Bank Account (in Stores/Configuration)
Stored Accounts (Braintree PayPal)	braintree_paypal_vault	Default Bank Account (in Stores/Configuration)

Tax Mapping

Go to **Xero Integration > Taxes Mapping**

1. Update Tax rates
2. Choose the tax field in Xero Tax

3. Save Mapping

Taxes Mapping

Store View: Default Config

(Tax method will be converted to the corresponding Xero tax. Only enabled Tax method will display here.)

Save Mapping Update Tax Rates

ID	Tax Identifier	Country	Xero Tax
1	US-CA-*Rate 1	US	[AVALARA] Auto Look Up
2	US-NY-*Rate 1	US	[INPUT] Tax on Purchases
3	uk	GB	Default Tax in Sale Account (in Stores/Configuration)

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Magento ver. 2.2.5
Account Activity | Report an Issue

Add Data to Queue/ Sync instantly to Xero

In **customer listing**, **product listing**, **order/invoice listing** and **credit memo listing**, you can add data to queue for later processing as mass action.

You can select the data you want to add to queue then choose **Actions > Add to queue**

You can also sync the selected data instantly to Xero by choosing **Actions > Sync to Xero**

Customers

Add New Customer

Search by keyword

Filters Default View Columns Export

20 per page 1 of 1

19 records found

	Email	Group	Phone	Country	State/Province	Customer Since	Web Site	Confirmed email	Account Created in	Action
☐	Account_mageneest@gmail.com	General				Apr 20, 2018 11:35:20 AM	Main Website	Confirmation Not Required	Default Store View	Edit
☐	first@last.com	General				Apr 5, 2018 10:42:45 AM	Main Website	Confirmation Not Required	Default Store View	Edit
☐	hieunguyenct55@gmail.com	General				Apr 5, 2018 4:11:17 AM	Main Website	Confirmation Not Required	Default Store View	Edit
☐	hieunguyen95@gmail.com	General	+841669546354	Vietnam		Apr 5, 2018 4:10:41 AM	Main Website	Confirmation Not Required	Default Store View	Edit
☐	wklyne@gmail.com	General				Jan 10, 2018 5:51:52 AM	Main Website	Confirmation Not Required	Default Store View	Edit
☐	lalene.depio@nichefashion.com.au	General	123456789	Philippines	cebu	Jan 10, 2018 4:41:23 AM	Main Website	Confirmation Not Required	Default Store View	Edit
☐	jack davi	General				Dec 1, 2017 7:55:15 PM	Main Website	Confirmation Not Required	Default Store View	Edit
☐	ytst ytst	General				Oct 12, 2017 6:01:54 AM	Main Website	Confirmation Not Required	Default Store View	Edit
☐	dominik.wiecek@gmail.com	General	123456789	United States	American Samoa	Sep 29, 2017 3:42:43 PM	Main Website	Confirmation Not Required	Default Store View	Edit
☐	luonghuyenmy95@gmail.com	General				Aug 24, 2017 4:20:12 AM	Main Website	Confirmation Not Required	Default Store View	Edit
☐	Liam Tran	General				Aug 20, 2017 2:24:03 PM	Main Website	Confirmation Not Required	Default Store View	Edit
☐	Cezary Testy-Exorigo	General	519080318	Poland		Aug 20, 2017 12:04:18 PM	Main Website	Confirmation Not Required	Default Store View	Edit

- DASHBOARD
- SALES
- CATALOG
- CUSTOMERS
- MARKETING
- CONTENT
- REPORTS
- INTEGRATION
- STORES
- SYSTEM
- FIND PARTNERS & EXTENSIONS

Products

Add Product

Filters
Default View
Columns

20 per page
1 of 1

Actions

- Delete
- Change status
- Update attributes
- Sync to Xero
- Add to Queue

12 records found

			Type	Attribute Set	SKU	Price	Quantity	Visibility	Status	Websites	Action	Xero Sales Account	Xero COGS Account	Xero Tracking Category
			Simple Product	Default	Test001	£1,221.00	12.0000	Catalog Search	Enabled	Main Website	Edit	Sales[4000]	Cost of Goods Sold[5000]	
			Simple Product	Default	Samsung Galaxy S9	£1,100.00	22.0000	Catalog Search	Enabled	Main Website	Edit	Service[4300]	Subcontractors[5300]	
☐	27		Simple Product	Default	Test product 1	£1,000.00	9999.0000	Catalog Search	Enabled	Main Website	Edit	Discount Received[4100]	Purchase Discount[5100]	
☐	30		Simple Product	Default	Ticket 1	£142.00	999.0000	Catalog Search	Enabled	Main Website	Edit	Service[4300]	Purchase Discount[5100]	
☐	31		Simple Product	Default	Incredible	£123.00	992.0000	Catalog Search	Enabled	Main Website	Edit	Sales[4000]	Cost of Goods Sold[5000]	
☐	26		Simple Product	Default	Scarlett Yellow Dress	£27.00	19984.0000	Catalog Search	Enabled	Main Website	Edit	Sales[4000]	Cost of Goods Sold[5000]	
☐	24		Simple Product	Default	Lovely Blue Jumpsuit	£21.00	19999.0000	Catalog Search	Enabled	Main Website	Edit	Sales[4000]	Cost of Goods Sold[5000]	
☐	25		Simple Product	Default	Black Culottes	£21.00	19982.0000	Catalog Search	Enabled	Main Website	Edit	Sales[4000]	Cost of Goods Sold[5000]	

Process Synchronization

If the App mode is Cron Job, data will be added to the Queue List to be sync after a specific interval. On the **Queue** List tab, admin can preven any data from being synced by removing them from the Queue list. Admin can also use click on **Sync Now** to syncall data on the queue list immediately.

Note that syncing time will vary, depending on the size of database.

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25 records found

20 per page

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Actions

Delete

☐	ID	Message	Dequeue Time	Xero Record Id	Type	Magento Entity Id	Status
☐	494	ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: Item code 'Xero Integration 1' is not valid	2017-06-03 08:39:17		PurchaseOrder	000000016	ERROR
☐	495	ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: PurchaseOrder not of valid status for creation	2017-06-03 08:39:17		PurchaseOrder	000000017	ERROR
☐	381	OK	2017-06-01 03:17:24	View on Xero	Item	tax	SUCCESS
☐	382	OK	2017-06-01 03:17:24	View on Xero	Item	shipping	SUCCESS
☐	383	OK	2017-06-01 03:17:24	View on Xero	Contact	magenest_xero	SUCCESS
☐	384	OK	2017-06-03 04:15:36	View on Xero	Item	tax	SUCCESS
☐	385	OK	2017-06-03 04:15:36	View on Xero	Item	shipping	SUCCESS
☐	386	OK	2017-06-03 04:15:37	View on Xero	Contact	magenest_xero	SUCCESS
☐	391	OK	2017-06-03 04:28:08	View on Xero	Contact	6	SUCCESS
☐	392	OK	2017-06-03 06:20:33	View on Xero	Contact	13	SUCCESS
☐	409	OK	2017-06-03 06:50:07	View on Xero	Item	Harmony Lumaflex Band Kit	SUCCESS
☐	411	OK	2017-06-03 06:56:32	View on Xero	Contact	d7b3d	SUCCESS
☐	412	OK	2017-06-03 06:56:33	View on Xero	Contact	4a22e	SUCCESS
☐	413	OK	2017-06-03 06:56:33	View on Xero	Contact	9bd63	SUCCESS
☐	414	OK	2017-06-03 06:56:34	View on Xero	Contact	ff965	SUCCESS
☐	457	OK	2017-06-03 07:10:29	View on Xero	Invoice	000000008	SUCCESS
☐	467	OK	2017-06-03 08:35:57	View on Xero	Contact	7	SUCCESS
☐	468	OK	2017-06-03 08:35:57	View on Xero	Contact	8	SUCCESS
☐	469	OK	2017-06-03 08:35:57	View on Xero	Contact	9	SUCCESS
☐	470	OK	2017-06-03 08:35:57	View on Xero	Contact	10	SUCCESS

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Navigate to **Xero Integration > Request Daily Report**, admins can easily see their synchronization status.

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Request Report

Requests Made Today

Total Request Today
8

Detail

Contact Request:	2
Item Request:	3
Order Request:	2
Invoice Request:	1
CreditNote Request:	No request has been made to day

Request Records

Detail

	Date	Number of Requests
Highest Request:	2017-06-03	42
Lowest Request:	2017-05-20	1

Request Report

Get Date From 06/01/2017 To 06/10/2017 Get Report

Requests

Date	Number of Requests
2017-06-01	7
2017-06-03	42
2017-06-05	8

Detail

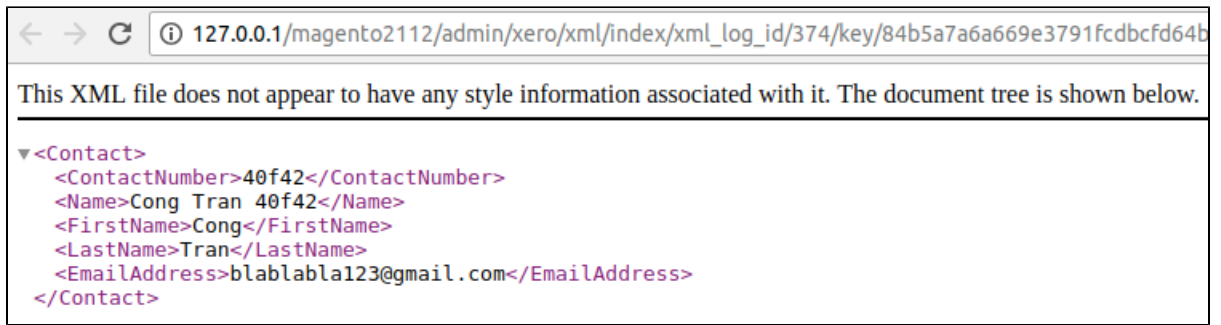
Type	Total Request	Request Failed
BankTransaction	1	1
Contact	17	0
Invoice	2	0
Item	10	1
PurchaseOrder	4	4

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You can also view the xml data that is synced to Xero. This helps you debug easily in case there is a bug.

	ID	Magento Entity Id	Type	Message	Dequeue Time	Website	Xero Record Id	XML Log	Status
☐	583	308022	BankTransaction	OK	2018-08-07 09:10:10	Second Website	View on Xero	View XML Log	SUCCESS
☐	582	test product	Item	OK	2018-08-07 09:10:09	Second Website	View on Xero	View XML Log	SUCCESS
☐	578	000000011	InvoiceToInvoice	OK	2018-08-07 08:59:41	Main Website	View on Xero	View XML Log	SUCCESS
☐	577	4	Contact	OK	2018-08-07 08:55:04	Second Website	View on Xero	View XML Log	SUCCESS
☐	569	C000000003	CreditNote	OK	2018-08-07 08:28:03	Second Website	View on Xero	View XML Log	SUCCESS



Main Functions

Video Demonstration

When a new account is registered on the frontend of Magento 2, Xero Integration extension will automatically add a new record on Xero site.

This is demo store. No orders will be fulfilled.

GET STARTED FOR FREE

Magenest

SALE TRAINING WOMEN

DEFAULT STORE VIEW

Create New Customer Account

Personal Information

First Name *

Thomas

Last Name *

Stevens

☐ Sign Up for Newsletter

Sign-in Information

Email *

thomasstevensbk1212@gmail.com

Password *

Password Strength: Medium

Confirm Password *

Create an Account

NEWSLETTER

Sign Up for Our Newsletter:

Enter your email address

SUBSCRIBE

ABOUT

Privacy Policy

Terms and Conditions

Magento Marketplace

Magento Customization

HELP

FAQ

ORDER TRACKING

SHIPPING AND HANDLING

PAYMENT METHODS

RET

INFOMATION

ABOUT US

DELIVERY INFORMATION

PRIVACY POLICY

TERMS CONDITIONS

SEVICES

CUSTOMER SERVICE

CONTACT US

 support@magenest.com

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Customers

5 records found
20 per page
1 of 1

	ID	Name	Email	Group	Customer Since	Web Site	Confirmed email	Account Created in	Action
☐	1	Danny Prichett Miller	dannymiller@gmail.com	General	Jul 13, 2016 8:08:37 AM	Main Website	Confirmation Not Required	Default Store View	Edit
☐	8	Jack Perez	ict10@gmail.com	General	Apr 22, 2017 8:51:25 AM	Main Website	Confirmation Not Required	Default Store View	Edit
☐	10	Jack Perez	jackp@gmail.com	General	Apr 23, 2017 3:35:47 PM	Main Website	Confirmation Not Required	Default Store View	Edit
☐	11	Jame Lorenz	jle@gmail.com	General	Apr 23, 2017 3:38:36 PM	Main Website	Confirmation Not Required	Default Store View	Edit
☐	13	Thomas Stevens	thomasstevensbk1212@gmail.com	General	Jun 3, 2017 6:19:08 AM	Main Website	Confirmation Not Required	Default Store View	Edit

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Or you can click on **Sync Now** button within each customer info dashboard to synchronize a specific customer data manually.

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Thomas Stevens

✓ Sync process complete, please check out Logs for results

CUSTOMER INFORMATION

- Customer View
- Account Information
- Addresses
- Orders
- Billing Agreements
- Newsletter
- Product Reviews
- Wish List
- Xero Integration**

Information

Xero ID: 785dd063-0dd6-4459-bff8-1bcacb5e2ecd

Last Updated At: Jun 2, 2017, 8:19:04 AM

Created At: Jun 2, 2017, 8:19:04 AM

Sync History

1.	2017-06-02 08:19:04	Ok
----	---------------------	----

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Contacts

All 7

Customers 1

Suppliers 0

Employees 0

Archived 0

Groups [New](#)

No groups

Smart Lists [New](#)

Have purchased an item

Outstanding > 30 days

Options Edit No items selected Search Sort by Name

CONTACT	EMAIL	YOU OWE THEM	THEY OWE YOU
☐ Chuck Taylor	chucktaylor@converse.c...	—	—
☐ Danny Miller Hanoi, 01234567890	dannymiller@gmail.com	—	—
☐ Jack Perez NYC, 5334533	jackp@gmail.com	—	—
☐ Jame Lorenz	jl@gmail.com	—	—
☐ Thomas Stevens	thomasstevensbk1212@...	—	26.00

Import Export Send statements Add contact

- Whenever admins create a new order, invoice, and product or edit them on Magento 2 store successfully, The data will be synced to Xero automatically.

- Orders

Orders

Create New Order

Search by keyword

Filters Default View Columns Export

Actions 18 records found 20 per page 1 of 1

ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
00000018	Main Website Main Website Store Default Store View	Jun 05, 2017, 4:06:00 AM	Thomas Stevens	Thomas Stevens	\$26.00	\$26.00	Closed	View
00000017	Main Website Main Website Store Default Store View	Jun 03, 2017, 6:06:00 AM	Thomas Stevens	Thomas Stevens	\$13.00	\$13.00	Closed	View
00000016	Main Website Main Website Store Default Store View	Apr 23, 2017, 15:04:00 PM	Jame Lorenz	Jame Lorenz	\$17.00	\$17.00	Processing	View

Tutorial Menu

Admins can synchronize a specific order by manually by clicking on **Sync Now** button on each order.

#000000018

← Back Send Email

ORDER VIEW

- Information
- Invoices
- Credit Memos
- Shipments
- Comments History
- Xero Integration**

Information

Xero ID: 54caa51e-b30b-4898-8f15-a386dbddab64

Last Updated At: Jun 5, 2017, 8:50:17 AM

Created At: Jun 5, 2017, 4:26:42 AM

Sync Now

Sync History

1.	2017-06-05 08:50:17	Ok
2.	2017-06-05 06:08:55	Ok
3.	2017-06-05 06:08:18	Ok
4.	2017-06-05 04:26:42	Ok

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Magenest William Moseley

Dashboard Accounts Payroll Reports Contacts Settings

Purchases

- Bank Accounts
- Sales
- Purchases**
- Checks
- Inventory
- Expense Claims
- Fixed Assets

+ New Purchase

All Drafts (1) Approved (1) Billed (0)

3 items Search

Number	Supplier	Date raised	Delivery date	Amount	Status	Sent
000000018	Thomas Stevens	Jun 5, 2017		26.00	Deleted	
000000016	Jame Lorenz	Jun 5, 2017		17.00	Approved	
000000011	Jams Mas	Jun 5, 2017		17.00	Awaiting Approval	

- Products

*** Note: The products name must be less than or equal to 50 characters otherwise it would be cut off to fit in since Xero only allows maximum 50 characters in product name.**

In addition, the products SKU must be less than or equal to 30 characters otherwise it can't be synced to Xero since Xero only allows maximum 30 characters in product SKU.

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 xero ▾

Add Product ▾

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Columns ▾

Actions ▾ 5 records found

20 ▾ per page < 1 of 1 >

	ID	Thumbnail	Name	Type	Attribute Set	SKU	Price	Quantity	Visibility	Status	Websites	Action
☐	21		Lilac Flower Dress	Simple Product	Default	Lilac Flower Dress	\$12.00	20000.0000	Catalog, Search	Enabled	Main Website	Edit
☐	22		Flora Maxi Dress	Simple Product	Default	Flora Maxi Dress	\$21.00	20000.0000	Catalog, Search	Enabled	Main Website	Edit
☐	23		White Printed Maxi Dress	Simple Product	Default	White Printed Maxi Dress	\$12.00	20000.0000	Catalog, Search	Enabled	Main Website	Edit

Tutorial Menu

For each product, this extension created Xero Integration tab that allows admins to synchronize a specific product to Xero.

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Harmony Lumaflex Band Kit

Store View: All Store Views

Back

Add Attribute

Save

Sync process complete, please check out Logs for results

Enable Product

Yes

Attribute Set

Default

Product Name

Harmony Lumaflex Band Kit

SKU

Harmony Lumaflex Band Kit

Dynamic SKU

Yes

Price

\$ 35.00

Advanced Pricing

Dynamic Price

No

Tax Class

Taxable Goods

Quantity

0

Advanced Inventory

Stock Status

In Stock

Weight

lbs

Dynamic Weight

Yes

Visibility

Catalog, Search

Categories

Training

New Category

Set Product as New From

To

Country of Manufacture

Content

Bundle Items

Product Reviews

Images And Videos

Search Engine Optimization

Related Products, Up-Sells, and Cross-Sells

Customizable Options

Product in Websites

Design

Schedule Design Update

Gift Options



DASHBOARD



PRODUCTS



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STORES

#000000001

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Order & Account Information

Order # 000000001 (The order confirmation email was sent)

Account Information

Order Date	Jul 13, 2016, 8:10:35 AM	Customer Name	Danny Miller
Order Status	Closed	Email	dannymiller@gmail.com
Purchased From	Main Website Main Website Store Default Store View	Customer Group	General

Address Information

Billing Address [Edit](#)

Danny Miller
Tay Son - Dong Da District
Hanoi, 12345-6789
Vietnam
T: 01234567890

Shipping Address [Edit](#)

Danny Miller
Tay Son - Dong Da District
Hanoi, 12345-6789
Vietnam
T: 01234567890

Xero Integration

Information

Xero ID: 576ff78e-d15f-40fe-9c23-7aca383a14a9
Last Updated At: Nov 14, 2016, 4:10:37 AM
Created At: Nov 12, 2016, 3:32:46 AM

[Sync Now](#)

Sync History

2016-11-14 04:10:37	Ok
2016-11-12 03:32:46	Ok

Payment & Shipping Method

Payment Information

Check / Money order
The order was placed using USD.

Shipping Information

Flat Rate - Fixed
Total Shipping Charges: **\$5.00**

Items Invoiced

Product	Price	Qty	Subtotal	Tax Amount	Discount Amount	Row Total
Yoga Adventure SKU: Yoga Adventure 1 Links Trailer #1 (2)	\$75.00	1	\$75.00	\$0.00	\$0.00	\$75.00
Nadia Elements Shell SKU: Nadia Elements Shell-KK47	\$8.00	1	\$8.00	\$0.00	\$0.00	\$8.00

Order Total

Invoice History

Comment Text

☐ Notify Customer by Email☐ Visible on Storefront[Submit Comment](#)

Invoice Totals

Subtotal	\$83.00
Shipping & Handling	\$5.00
Grand Total	\$88.00

[Report Bugs](#)

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Credit Memos

4 records found

20 per page

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☐	Credit Memo	Created	Order	Order Date	Bill-to Name	Status	Refunded	Action
☐	000000001	Nov 15, 2016 2:24:07 AM	000000004	Jul 13, 2016 8:30:35 AM	Chuck Taylor	Refunded	\$99.00	View
☐	000000002	Nov 15, 2016 2:53:59 AM	000000001	Jul 13, 2016 8:10:35 AM	Danny Miller	Refunded	\$88.00	View
☐	000000003	Nov 15, 2016 3:11:29 AM	000000006	Aug 31, 2016 3:57:44 PM	Chuck Taylor	Refunded	\$1,050.00	View
☐	000000004	Nov 15, 2016 3:21:27 AM	000000002	Jul 13, 2016 8:18:24 AM	Danny Miller	Refunded	\$102.00	View

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All
Drafts

Awaiting Payment (1)

Paid

Repeating

Number	Ref	Date	Due Date	Paid	Due	Status	Sent
2		Nov 15, 2016		0.00	0.00	Paid	
1	Chuck Taylor	Nov 15, 2016		0.00	0.00	Paid	
000000003	Chuck Taylor	Jul 13, 2016	Jul 13, 2016	0.00	0.00	Paid	
000000002	Danny Miller	Jul 13, 2016	Jul 13, 2016	0.00	97.00	Awaiting Payment	
000000001	Danny Miller	Jul 13, 2016	Jul 13, 2016	0.00	0.00	Paid	

Troubleshooting

- ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: Item code 'shipping' is not valid

☐	3875	3000000002	OrderToInvoice	ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: Item code 'shipping' is not valid	2018-11-08 04:02:14	ERROR	Default Website	View XML Log
--------------------------	------	------------	----------------	---	---------------------	-------	---------------------------------	------------------------------

=> Please disconnect and re-connect your Xero account in Xero Integration -> Configuration.

- ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: Item code 'demo-product' is not valid

☐	3878	3000000001	OrderToInvoice	ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: Item code 'demo-product' is not valid	2018-11-08 04:05:47	ERROR	Default Website	View XML Log
--------------------------	------	------------	----------------	---	---------------------	-------	---------------------------------	------------------------------

=> Please sync related items first, then re-sync the order/invoice or turn on setting "Sync Needed Data"

- ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: An existing contact could not be found using the specified contact details. The contact name field is required to create a new contact.

☐	3880	3000000003	OrderToInvoice	ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: An existing contact could not be found using the specified contact details. The contact name field is required to create a new contact.	2018-11-08 04:11:51	ERROR	Default Website	View XML Log
--------------------------	------	------------	----------------	---	---------------------	--------------	-----------------	------------------------------

=> Please sync related customer first, then re-sync the order/invoice or turn on setting "Sync Needed Data"

- ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: Organisation is not subscribed to currency

☐	3854	000000006	InvoiceToInvoice	ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: Organisation is not subscribed to currency	2018-10-25 07:51:23	ERROR	Default Website	View XML Log
--------------------------	------	-----------	------------------	--	---------------------	--------------	-----------------	------------------------------

=> Please check your Xero currency and your order currency, make sure that your Xero account support the order currency

- ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: The specified bank account details does not match a known bank account.

☐	3894	000000	BankTransaction	ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: The specified bank account details does not match a known bank account.	2018-11-08 04:27:39	ERROR	Default Website	View XML Log
--------------------------	------	--------	-----------------	---	---------------------	--------------	-----------------	------------------------------

=> Please check your Xero bank account and make sure it is correctly configured in Xero integration configuration.

- ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: Invoice could not be found

☐	3882	000000038	Payment	ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: Invoice could not be found	2018-11-08 04:18:38	ERROR	Default Website	View XML Log
--------------------------	------	-----------	---------	--	---------------------	--------------	-----------------	------------------------------

=> Please check invoice error with above errors and then re-sync the order/invoice first

- ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: Invoice not of valid status for modification, This document cannot be edited as it has a payment or credit note allocated to it.

☐	3856	000000013	InvoiceToInvoice	ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: Invoice not of valid status for modification, This document cannot be edited as it has a payment or credit note allocated to it.,	2018-10-25 07:51:23	ERROR	Default Website	View XML Log
--------------------------	------	-----------	------------------	---	---------------------	--------------	-----------------	------------------------------

=> This invoice in Xero is already in the status that does not allow to modify anymore.

Update

- When a new update is available, we will provide you with a new package containing our updated extension.
- You will have to delete the module directory and repeat the installing steps above.
- Flush the config cache. Your store and newly installed module should be working as expected.

Support

- We will reply to support requests within **2 business days**.
- We will offer **lifetime free update and 6 months free support for all of our paid products**. Support includes answering questions related to our products, bug/error fixing to make sure our products fit well in your site exactly like our demo.
- Support **DOES NOT** include other series such as customizing our products, installation and uninstallation service.

Once again, thank you for purchasing our extension. If you have any questions, please do not hesitate to contact us for support.