

Xero API

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Xero API

There are a few steps to setup Xero

Following this documentation in Xero Setup, click on link below

[Xero setup](#)

Xero API Link settings

Create application

Visit this URL [App management - Xero](#)

Click the new app button

[image.png](#)

Application URL should be the web address of the server

Redirect URI should be **https://{serverHostName}/csp/sys/oauth2/OAuth2.Response.cls**

Click on the app and then select the Configuration menu.

[image.png](#)

Server Settings

Go to System administration -> Security -> Client, in the management portal for the server.

[image.png](#)

Click the Create Server Description button.

[image.png](#)

Issuer endpoint should be

https://login.xero.com/identity/connect

An SSL config will be needed for this, which is selected as the SSL/TLS configuration

Click on Client Configurations for the server description just created

[image.png](#)

[image.png](#)

Click on the Create Client Configuration button.

[image.png](#)

For "Application Name", "Client name" and "Description" enter "**xero-{namespace}**".

Client type should be "Confidential".

Enter the servers host name into the "Host name" text box.

Click on the "Client Credentials" tab

[image.png](#)

Enter the details shown here in the configuration section of the Xero app that was created earlier.

[image.png](#)

API Huge ERP

Configuration Module > Security > API Setup

Add as shown below into the API setup in the SCM module

"xero-hugeerp" should be replaced with "**xero-{namepsace}**"

×

API

Standard

Functions

Custom Fields

Close

API:

Xero

Location:

User Name:

Password:

API Key:

Authenticate App Name:

xero-nz1000100

Config:

Notes:

Active:

☒

✓ Authenticate Sign In

Save

Save & Close

Close

Tick the functions that are needed to activate the link between Huge ERP and Xero

X

API

Standard
Functions
Custom Fields
Close

Debtors Active: ☒

Creditors Active: ☒

Quotes Active: ☐

Sales Order Active: ☐

Invoices Active: ☒

Credit Note Active: ☒

Debtors Contact Active: ☒

Xero Sales Acc:

Xero COS Acc:

Stock Types Active: ☒

Messages Active: ☐

Time log Active: ☐

GRV Active: ☒

Return To Supplier (RTS) Active: ☒

Build Tasks: ☐

Xero Division:

Xero SalesRep:

[Set Xero Tenant](#)

[Authenticate Sign In](#)

 Save
 Save & Close
 Close

Xero Sales Acc	Here you can specify which sales Xero items must go to
Xero COS Acc	Here you can specify which Cost of Sales Xero items must go to
Xero Division	Here you can set up your Xero Division as default
Xero Sales Rep	Here you can select a Sales Rep as a default

Set Xero Tenant	Once you have Authenticated your Debtors, Creditors and Inventory, you will need to set the Xero Tenant which is a once off setup.
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Click "save" and then the "Authenticate sign in" button.

Enter the login details for your Xero company into the window that opens.

Xero data files

When setting up Xero, the following master files need to be imported into Huge ERP

1. Customer list
2. Supplier list
3. Inventory list

The customer and supplier codes are usually the same as the company names in Huge ERP.

The codes in Huge ERP which is the company names are the codes in Xero.

Make sure that the Debtors and Creditors codes are not duplicated in Huge ERP as Xero does not have separated databases for customers and suppliers. They are the contact list but marked as a customer and supplier. Having the the same code in debtors and creditors will cause problems in the sync.

Procedure

1. Export customer, supplier and inventory lists from Xero
2. Fix data files for Huge ERP import
3. Import the data into Huge ERP
4. Link API to Xero
5. Verify codes for Customers
6. Verify codes for Suppliers
7. Verify codes for Inventory

Verify

Customers verify

Debtors Module > Configuration > Debtors Setup

Click Search all Debtors

Run this utility to check customers in Xero and Huge ERP.

When the utility finds the same customer, it will write an internal code from Xero into the tables of Huge ERP.

Whether the customer is updated, Huge ERP knows which customer to update in Xero.

The screenshot shows the 'Debtors Module' configuration window. The 'Debtors Setup' tab is active. The 'Import / Export' dropdown menu is open, showing options like 'Debtor Import / Export', 'Contact Import / Export', 'Account Manager Import / Export', 'Interest Import / Export', 'Xero check customer duplicates' (highlighted with a red box), and 'Shopify check customer duplicates'. The main window displays a table of debtors with columns for #, Att, Memo, Status, Web, Code, Company Name, Short Name, Trading As, Postal Address1, Postal Address2, Telephone, and Co.

#	Att	Memo	Status	Web	Code	Company Name	Short Name	Trading As	Postal Address1	Postal Address2	Telephone	Co
1					00	00 Stock Control						
2					0000	In house account						
3					1234567	Malcolm new company						
4					3001	Debtors new code						
5					ABC0010	ABC Company	ABC	123 Co	PO Box 123	Christchurch	022 123 4569	Jol

This is a once off setting that needs to be done, once this has been done and you Add a new debtor, it will automatically sync to Xero

Verify Creditors

Creditors Module> Configuration> Creditors Setup

Clock search all Creditors

Run this utility to check suppliers in Xero and Huge ERP.

When the utility finds the same supplier, it will write an internal code from Xero into the tables of Huge ERP.

Whether the supplier is updated, Huge ERP knows which Supplier to update in Xero.

The screenshot shows the 'Creditors Module' configuration window. The 'Creditors Setup' tab is active. The 'Import / Export' dropdown menu is open, showing options like 'Creditor Import / Export', 'Creditor Contact Import / Export', 'Statutory Import / Export', 'Interest Import / Export', 'Head Office Import / Export', 'Supplier Price List Import / Export', and 'Xero check supplier duplicates' (highlighted with a red box). The main window displays a table of creditors with columns for #, Att, Memo, Status, Web, Creditor Code, Name, Telephone, Fax, Email, Contact Person, Outstanding Balance, and Preferred Currency.

#	Att	Memo	Status	Web	Creditor Code	Name	Telephone	Fax	Email	Contact Person	Outstanding Balance	Preferred Currency
1					ACC001	Allied Suppliers					(7.97)	South African Rands
2					ACC002	Allied Suppliers ...					4 290.00	US Dollar
3					CLBS001	Wonkey Walley'...					1 338.60	NZ Dollar
4					CLBS002	X Marks the Sp...					5.75	NZ Dollar
5					CLBS003	Yellow Cab Tran...					362.71	NZ Dollar

This is a once off setting that needs to be done, once this has been done and you Add a new Creditor, it will automatically sync to Xero

Inventory verify

Inventory Module> Configuration> Inventory Setup

Click Search all Items

Run this utility to check customers in Xero and Huge ERP.

When the utility finds the same inventory, it will write an internal code from Xero into the tables of Huge ERP.

Whether the inventory is updated, Huge ERP knows which item to update in Xero.

Inventory Setup

Search by Item Code | Custom Search | Expand

Item Code: Item Description:
Barcode: Suppliers Item Code:
Group Code: Suppliers Name:
Order By: Stock Code: Category:
Active: ☒ BOM Items: ☐ Serialised Items: ☐

Summary:

Total Stock	Total Custom	Total Service	Fixed Assets	Total BOM
186	32	26	3	6

Main | Cost Price | Supplier Cost Price | Stock Available | Serial Numbers

#	Att	Memo	Status	Stock Code	Short Description	Qty On Hand	Stock Type	Suppliers	Group Code	Pricing Level
1				00-1000	African Daisy S...	7	Stock	Recltron		Default
2				00-1005	Balloon Flowers...		Stock	Recltron		Default
3				0852738006003	flash		Stock	Recltron		Default
4				10-1000	African Daisy 1...		Stock	Recltron		Default
5				10-1005	Balloon Flowers...		Stock	Recltron		Default
6				22249800101	PE35/8.795 coa...		Stock	DEF Company	PAPER	Default
7				22249800102	PE35/8.795 coa...		Stock		PAPER	Default
8				22249800103	PE35/8.795 coa...		Stock	DEF Companv	PAPER	Default

Import & Export

- Inventory Import/Export
- Basic Inventory Import / Export
- Inventory Properties Import / Export
- Bin Location Import / Export
- Bulk Offers Import / Export
- Bulk Discount Import / Export
- Item Sales Rep Comm Import / Export
- Fact List Import / Export
- Family Tree Import / Export
- Pricing Level Import / Export
- Replacement Item Import / Export
- Unit Of Measure Link Import / Export
- Supplier Item Link Import / Export
- Customer Item Code Import / Export
- Wastage Item Import / Export
- Xero check duplicate items**
- Shopify check duplicate items

This is a once off setting that needs to be done, once this has been done and you Add a new Inventory item, it will automatically sync to Xero

Xero Sales and Cost of Sales for an Inventory Item

To set up a specific Sales and COS account for an inventory item, double click on the inventory item

Go the Comment/Replace Tab, here you can stipulate a specific account that this item must go to when adding this item to an invoice.

Edit Inventory Item



Inventory Detail



Attachment Memo Info Suppliers Warehouses Alerts Inventory Overview Functions Close

Inventory Code: 00-1000

Description: African Daisy Seed

General Details More Details Extra Details Pricing Levels Properties **Comment / Replace** Custom Fields

Comments:

Xero Sales Acc: Xero COS Acc: Limit Sales Qty: ☐

Replacement Item:

Page 0 of 0 Add Delete View Remove Paging: ☐ No data to display

#	Code	Description	Stock Type	UOM	Selling Price
---	------	-------------	------------	-----	---------------

Save & New Save & Close Save Close

Recalculate Item

Troubleshooting

Trouble Processing a Transaction

If you are trying to process an invoice, Credit Note, GRV or a Stock Return and you get an error, you can disconnect Huge ERP from Xero.

System Configuration > Security > API Setup

Click Search

Double click on Xero to open

The screenshot displays the 'API Setup' window. On the left, the 'System Configuration' menu is visible, with 'Security' expanded and 'API Setup' selected. The main panel shows a table of API integrations. The 'Xero' entry is highlighted with a red box. The table has columns for ID, Name, and Location.

#	Name	Location
1	Test	gps-world.street-directory.com.au
2	Stripe	api.stripe.com
3	Xero	

Untick the Active Box and click save and close

×

API

Standard

Functions

Custom Fields

Close

API:

Xero

Location:

User Name:

Password:

API Key:

Authenticate App Name:

xero-nz1000100

Config:

Notes:

Active:

☐

Authenticate Sign In

Save

Save & Close

Close

Failed to post to Xero

Invoice

Debtors Module > Activity > Invoice

When you have an invoice that Fails to push through to Xero, you can process this manually.

Open your invoice

Click the "Action" Tab, you will see the button "Push to Xero" by clicking this button the transaction will be pushed to Xero.

The screenshot displays the 'Debtors Module' interface. On the left sidebar, the 'Activity' tab is selected, and the 'Invoice' option is highlighted. The main window shows the 'Invoice Search' form with fields for Debtors, Description, Date From (2024-11-01), and Date To (2025-01-30). The 'Invoice Status' is set to 'Preparation And Part Invoice'. Below the search form, the 'Invoice' tab is active, showing a 'Part Invoicing Setup' section with a 'Push to Xero' button highlighted. The 'Items' table at the bottom lists three items: a Stock item (100mm x 50mm Irregular split, Silver PET Synthetic, Permanent, Core 76mm, 1,000 labels per roll), a Custom item (LABEL/DIE), and a Service item (FREIGHT-OUT CHCH).

#	Seq. No.	LS	Status	Type	Code	Description
1	1			Stock	L/SY/P/100x050/SB/AF	100mm x 50mm Irregular split, Silver PET Synthetic, Permanent, Core 76mm, 1,000 labels per roll
2	2			Custom	LABEL/DIE	Label Die - once off cost
3	3			Service	FREIGHT-OUT CHCH	Freight

Credit Note

Debtors Module > Activity > Credit Note

When you have a Credit Note that Fails to push through to Xero, you can process this manually.

Open your Credit Note

Click the "Action" Tab, you will see the button "Push to Xero" by clicking this button the transaction will be pushed to Xero.

Debtors Module

Configuration

Activity

- Debtors Dashboard
- Debtors Journal Transactions
- Debtors Cash Books
- Quotation
- Sales Order
- Sales Order Confirm
- Invoice
- Dispatch Stock
- Collect / Deliver
- Credit Notes**
- Allocations
- Template List
- Interest Transaction
- Collections

Credit Notes

Search Add Edit Clone Cancel Process Credit Note Quick Process Functions Print / Export

Basic Search Custom Search Expand

Debtors: L: Credit Note Status: **Preparation**

Description: Reference:

Date From: 2024-12-31 Date To: 2025-01-30

Order Number: Sales Rep:

Total Ex GST: 0.00 Total GST: 0.00 Total Inc GST: 0.00

Page 0 of 0 Remove Paging: Import From In

Att Memo Credit Note Date Debtors Code Debtors Name Description

Import Invoice

Attachments Memo Create Reminder Change Warehouse Create Quote

Credit Note

Detail Address Link Shipping **Extras** Docs Custom Fields Save Close Print Doc Process T & Cs

Job Number: Long Description:

Credit Job Percentage Invoice: ☐

Asset Item:

Attach Spec To Email: ☐ Print Custom Fields: ☐

Time Log Credit Note: ☐ Time Log Budget: ☐

Assembly: ☐ Deposit Doc: ☐ Retention Credit: ☐

Push to Xero

Items

#	Line Ref.	Seq. No.	LS	Status	Type	Item	Description	Warehouse	Sal
1		1			Stock	R/RE/110x300/...	110mm x 300m Resin Ribbon CSO C-25	Master WHS	
2		2			Stock	L/PL/P/030x010...	30mm x 10mm White Permanent Polyester Matt Label 2000...	Master WHS	
3		3			Stock	L/PL/P/040x015...	40mm x 15mm Matt silver Polyester Permanent 2000L Roll	Master WHS	
4		4			Stock	L/PL/P/030x020...	30mm x 20mm White Extra Permanent Polyester Matt Label...	Master WHS	
5		5			Serv...	FREIGHT-OUT II	Freight - North Island, up to 15kg		

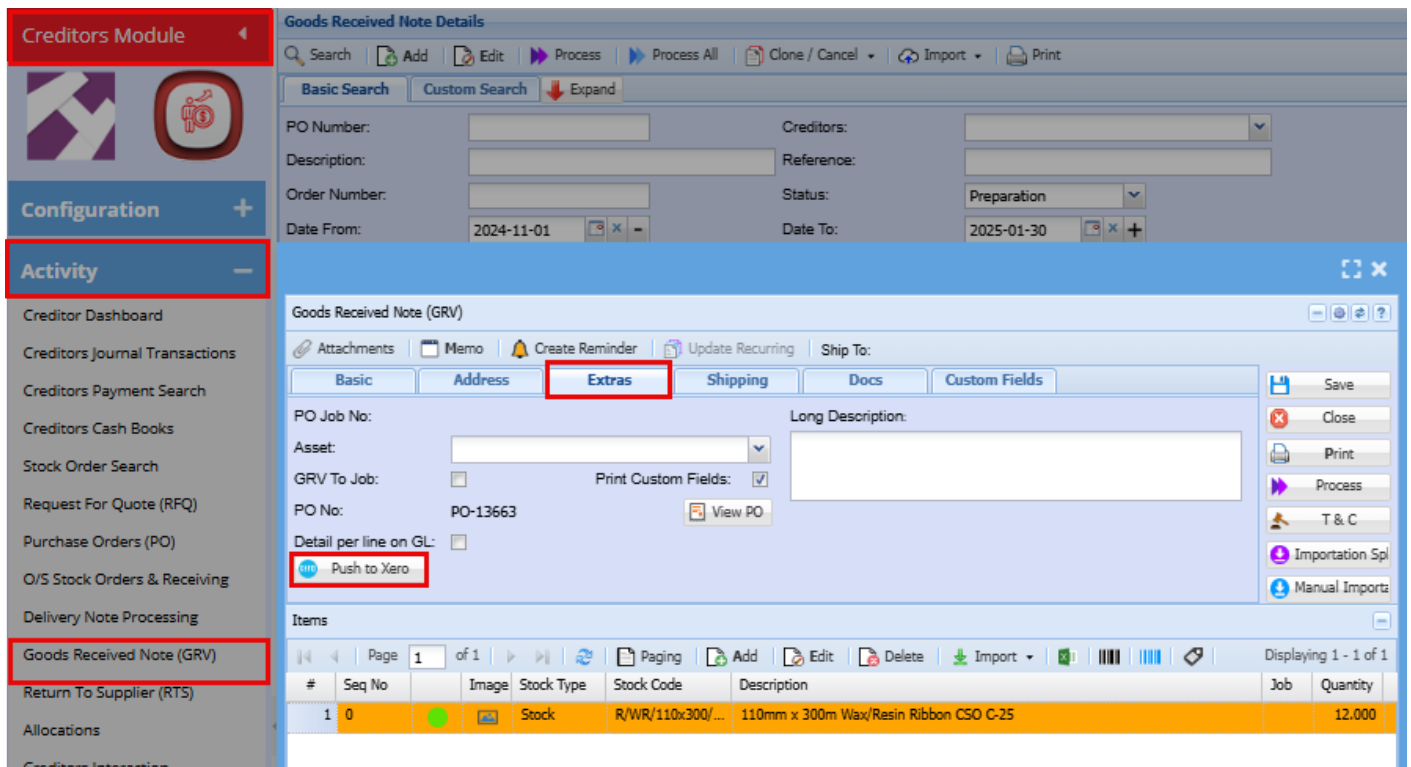
GRV

Creditors Module > Activity > Goods Received Note (GRV)

When you have a GRV that Fails to push through to Xero, you can process this manually.

Open your GRV

Click the "Extras" Tab, you will see the button "Push to Xero" by clicking this button the transaction will be pushed to Xero.



Stock Return

Creditors Module > Activity > Return to Supplier (RTS)

When you have a Stock Return that Fails to push through to Xero, you can process this manually.

Open your Stock Return

Click the "Action" Tab, you will see the button "Push to Xero" by clicking this button the transaction will be pushed to Xero.

View Posted and Non posted Transactions

Debtors

Debtors Module > Analysis > Debtors Document History

In the column "Posted to Xero" you will see either Yes which means it was posted to Xero or blank which means it has not been posted to Xero

Debtors Module

Configuration

Activity

Analysis

Debtors Search

Debtors Analysis

Debtors Document History

Debtors Transaction History

Dispatch Stock History

Debtors Cash Books History

Document Management

Document History

Search

View

Clone

Delete

Create Template

Related Transactions

Create Reminder

Email Self

Functions

Print / Export

Basic Search

Custom Search

Expand

Document Type:

Invoice Processed

Document Number:

To:

Debtors Code:

Date From:

2024-11-01

Short Description:

Order By:

Date

Sales Rep.:

All

Debtors Name:

Date To:

2025-01-30

Reference:

Page 1 of 1

Remove Paging

Revert Quote

Total Ex GST: 79 433.70

		#	Att	Memo	Doc. Date	Doc. Type	Doc. No	Debtors Code	Debtors Name
☐	Posted To Xero	52			2024-12-03	Invoice	INV-12245	SPUI	
☐	Yes	53			2024-12-04	Invoice	INV-12246	AOT	
☐		54			2024-12-04	Invoice	INV-12259	JEU	
☐		55			2024-12-09	Invoice	INV-12247	ARA	
☐		56			2024-12-09	Invoice	INV-12256	MCI	
☐		57			2024-12-09	Invoice	INV-12249	HIT	
☐	Yes	58			2024-12-09	Invoice	INV-12288	VIP	
☐		59			2024-12-09	Invoice	INV-12250	SGS	
☐		60			2024-12-09	Invoice	INV-12251	WO	
☐		61			2024-12-09	Invoice	INV-12252	ROT	

To post to Xero double click to open the transaction

Click the "Action" Tab, you will see the button "Push to Xero" by clicking this button the transaction will be pushed to Xero.

CASH SALE

Attachments

Memo

Create Reminder

Check Stock Qtys

Functions

Import

Order History

Invoice

Detail

Address

Extras

Link

Shipping

Action

Scan

Part Invoicing Setup

Part Invoice:

Part Invoice Type:

Debtors Payment:

Debtors Journal Action:

Description:

Exclude From Bulk Email:

Push to Xero

Save

Close

View Quote

Print Invoice

Process Invoice

T & Cs

Payments

Items

Page 1 of 1

Paging

Add

Note

Edit

Delete

Quick

Barcode

Show/Hide

Displaying

#	Seq. No.	LS	Status	Type	Code	Description
1	1			Stock	SCANSKU/G/2D	ScansKU G-Series 2D Scanner 5.99" touch screen
2	2			Stock	SCANSKU/G/PISTOL	ScansKU G-Series Pistol Grip
3	3			Service	BARCOUNT	Barcode Count App annual subscription
4	4			Service	FREIGHT-OUT II	Freight - North Island, up to 15kg

Double check your transaction is not already in Xero as clicking this will duplicate the transaction if it was already posted

Creditors

Creditors Module > Analysis >Creditors Document History

In the column "Posted to Xero" you will see either Yes which means it was posted to Xero or blank which means it has not been posted to Xero

Creditors Module

Configuration

Activity

Analysis

Creditors Analysis

Creditor Document History

Creditors Transaction History

Creditors Cash Books History

Purchase Order History

Document Management

Document History

Search View Clone Delete Create Template Related Transactions Reminder Email Self

Basic Search Custom Search Expand

Document Type: GRV and RTS Processed Order By: Date

Document Number: To:

PO Number:

Creditors:

Creditors Name:

Date From: 2024-09-05 Date To: 2025-01-30

Description:

Reference:

Page 1 of 1 Remove Paging:

	Posted To Xero	#	Att	Memo	Doc. Date	Doc. Type	Doc. No.	Creditor Code	Creditors Name
		83			2024-11-25	Goods Received N...	GRV-1831	ERP	
		84			2024-11-26	Goods Received N...	GRV-1814	PRE	
		85			2024-11-27	Goods Received N...	GRV-1815	HOM	
		86			2024-11-27	Goods Received N...	GRV-1816	INGI	
		87			2024-11-29	Goods Received N...	GRV-1817	LEA	
	Yes	88			2024-12-02	Goods Received N...	GRV-1818	DOV	
		89			2024-12-03	Goods Received N...	GRV-1822	STI7	
		90			2024-12-04	Goods Received N...	GRV-1820	PRE	
		91			2024-12-10	Goods Received N...	GRV-1821	STI7	
		92			2024-12-11	Stock Returned Note	STN-1020	SCAI	
	Yes	93			2024-12-15	Goods Received N...	GRV-1824	NZO	
	Yes	94			2024-12-16	Goods Received N...	GRV-1823	SEK	
	Yes	95			2024-12-17	Goods Received N...	GRV-1825	LEA	
	Yes	96			2024-12-17	Goods Received N...	GRV-1826	LEA	

To post to Xero double click to open the transaction

Click the "Extras" Tab, you will see the button "Push to Xero" by clicking this button the transaction will be pushed to Xero.

Goods Received Note (GRV)

Attachments Memo Create Reminder Update Recurring Ship To:

Basic Address **Extras** Shipping Docs Custom Fields

PO Job No: Long Description:

Asset:

GRV To Job: ☐ Print Custom Fields: ☒

PO No: View PO

Detail per line on GL: ☐

 Push to Xero

Save Close Print Process T & C Importation Spl Manual Imports

Items

Page 1 of 1

Paging Add Edit Delete Import

#	Seq No		Image	Stock Type	Stock Code	Description	Job	Quantity
1	0	%		Custom	H-ERP-SYS	Huge ERP Subs - Makaurau Marae Nursery- \$132		1.000
2	0	%		Custom	H-ERP-SYS	Huge ERP Subs - Ellesmere College- \$134		1.000
3	0	%		Custom	H-ERP-SYS	Huge ERP Subs - Brand Mowers and Chainsaws - \$107		1.000
4	0	%		Custom	H-ERP-SYS	Huge ERP Subs - Barenburg - \$385		1.000
5	0	%		Custom	H-ERP-SYS	Huge ERP Subs - Halo & Hazard - \$119		1.000

Displaying 1 - 5 of 5

Double check your transaction is not already in Xero as clicking this will duplicate the transaction if it was already posted