Xero API

- Xero API
- Xero API Link settings
- Xero data files
- Troubleshooting

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-{namespance}**".
Client type should be "Confidential".
Enter the servers host name into the "Host name" text box.

Click on the "Client Credentials" tab

image.png

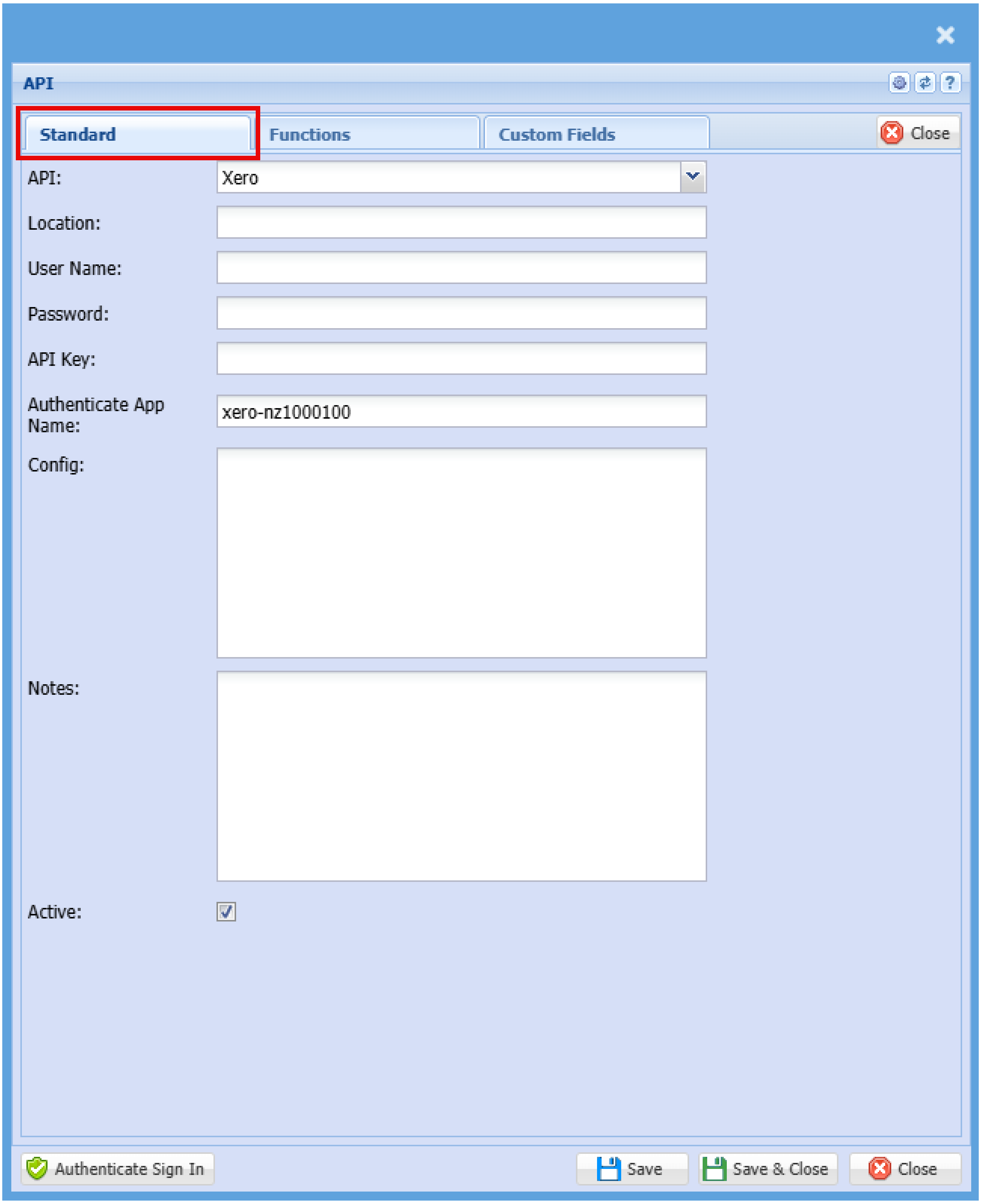
Enter the details shown here in the configuration section of the Xero app that was created earlier.

image.png

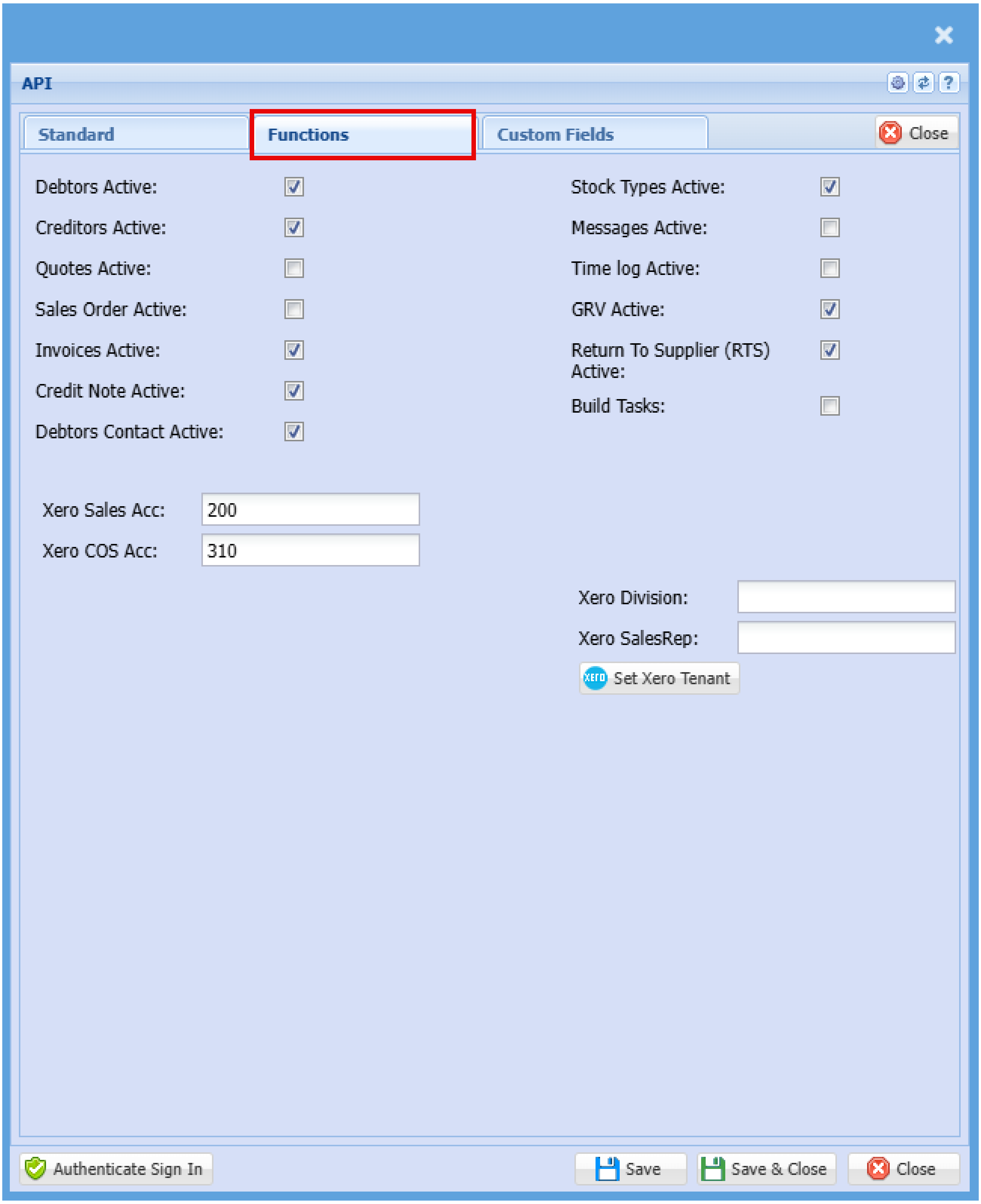
API Huge ERP

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}**"



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



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.

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

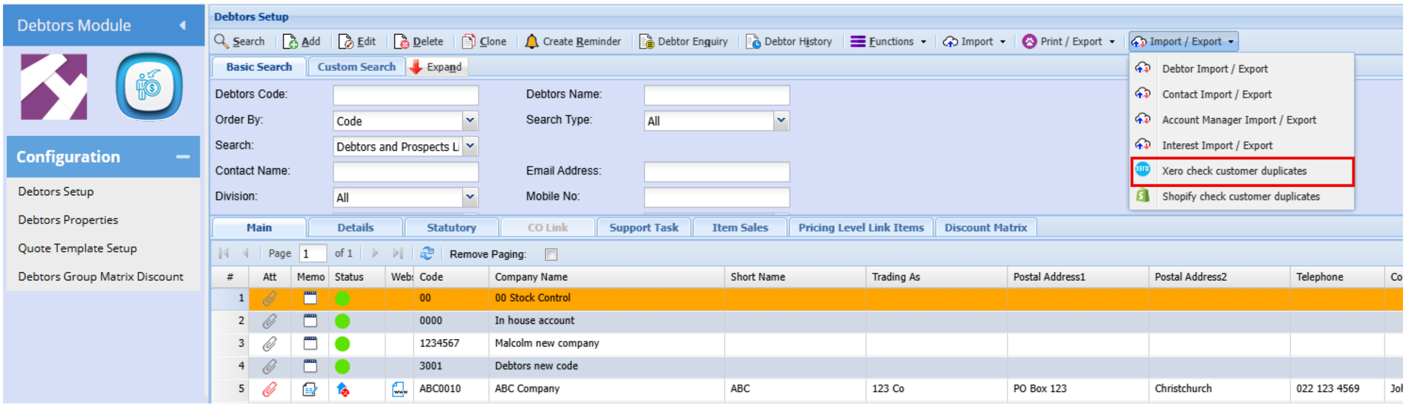
Debtors Module> Configuration> Debtors Setup

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.



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

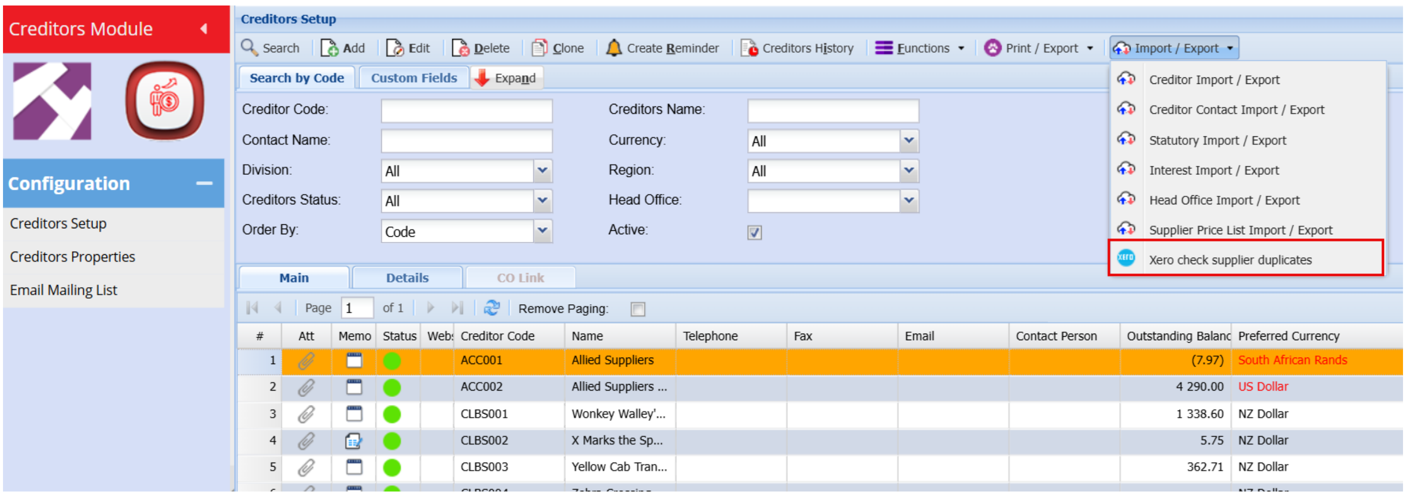
Creditors Module> Configuration> Creditors Setup

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.



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

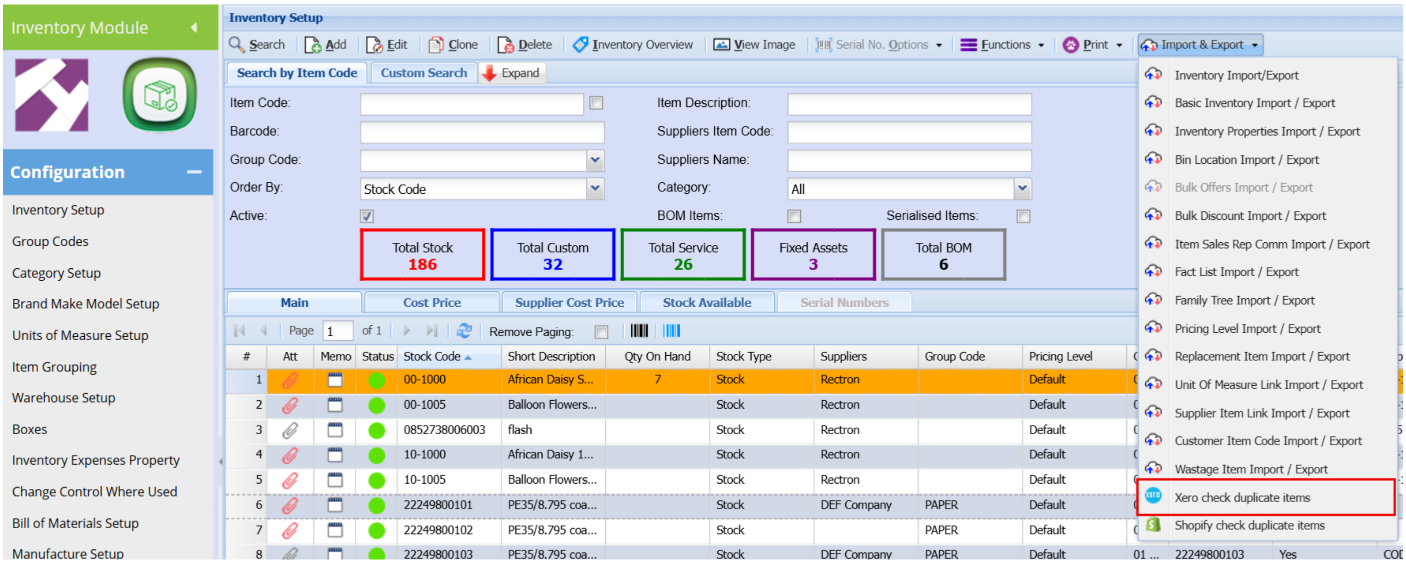
Inventory Module> Configuration> Inventory Setup

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.



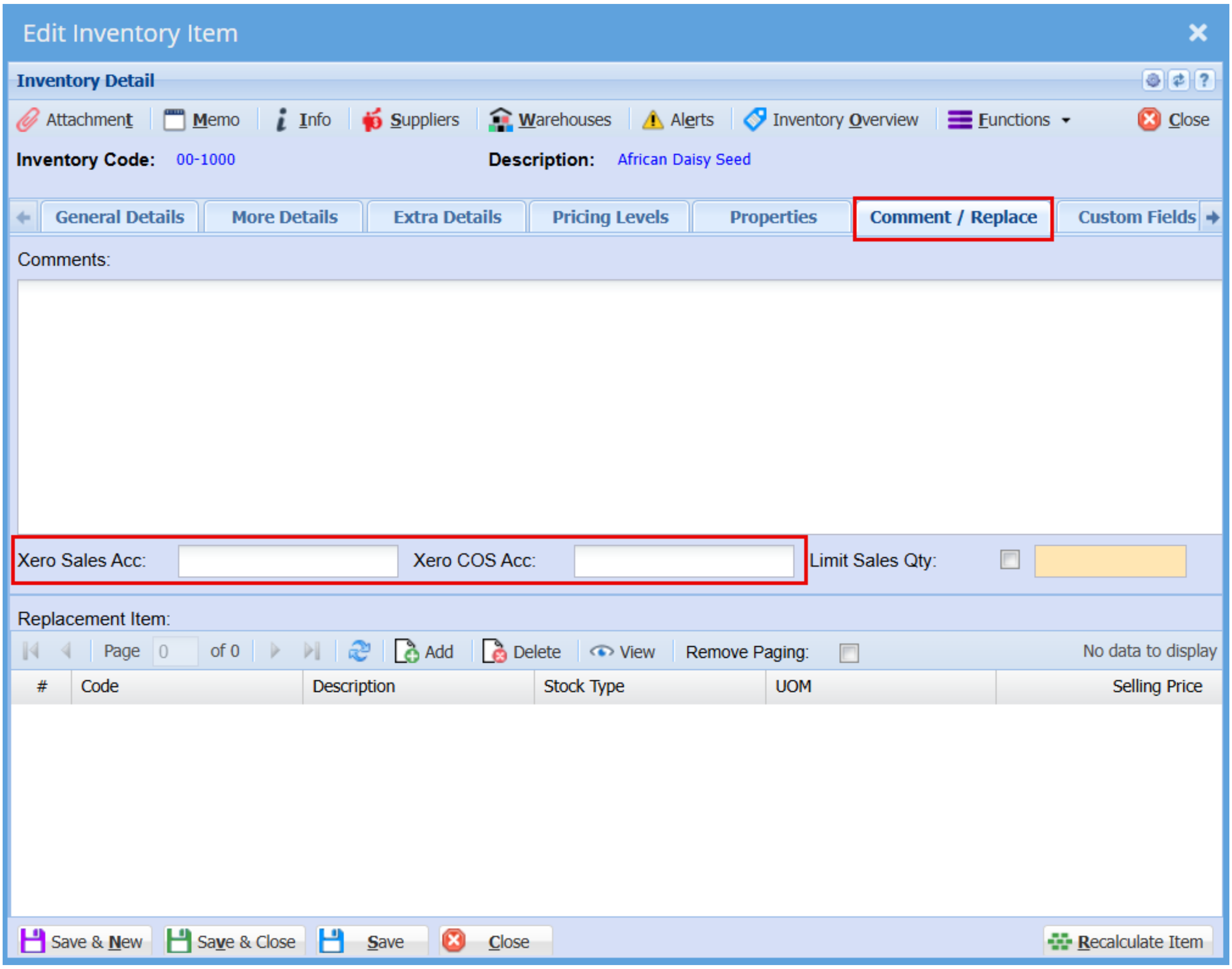
This is a once off setting that needs to be done, once this has been done and you Add a new Inventory item, it will automatically sync to Xero

---

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

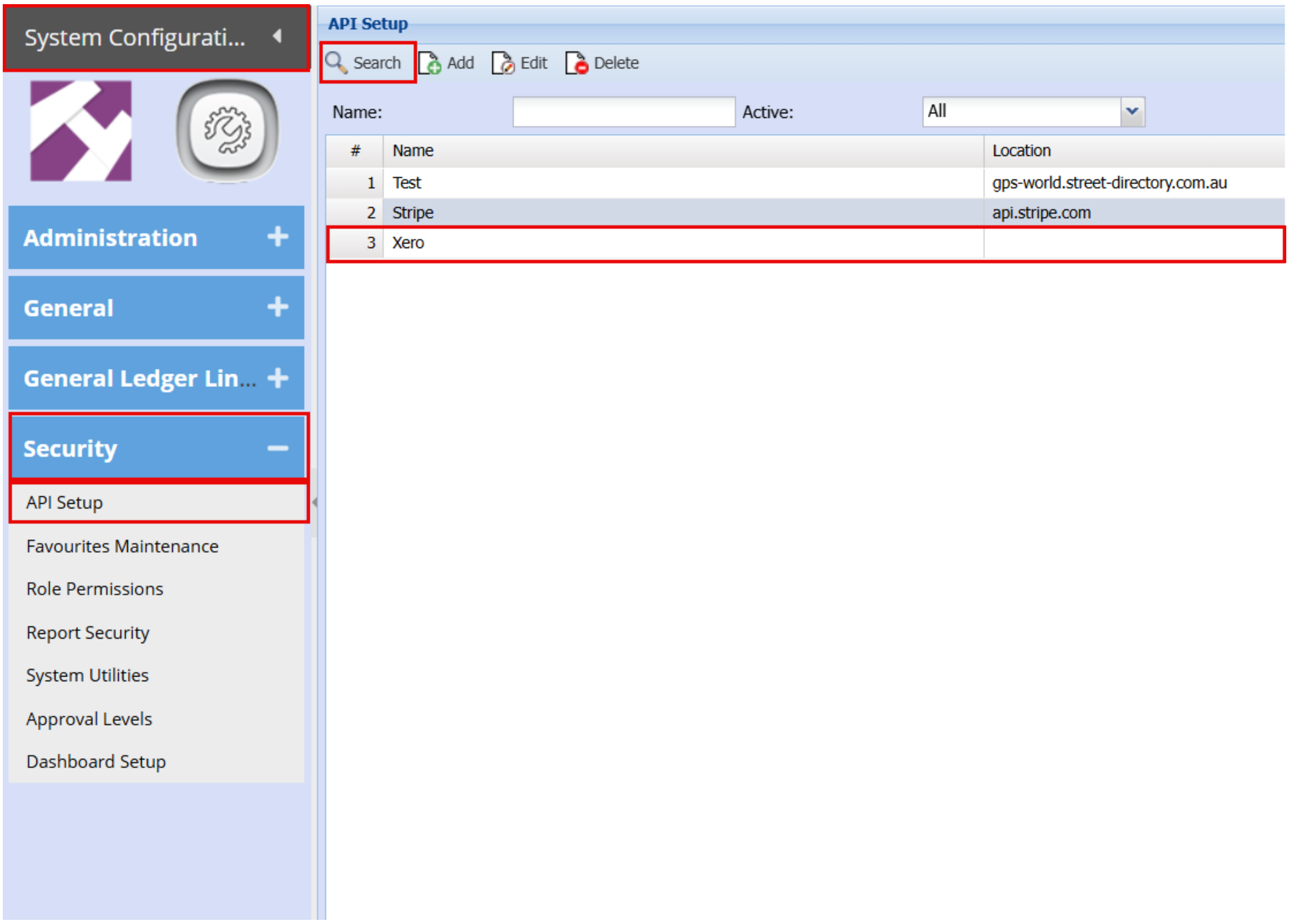
Trouble Processing a Transaction

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.

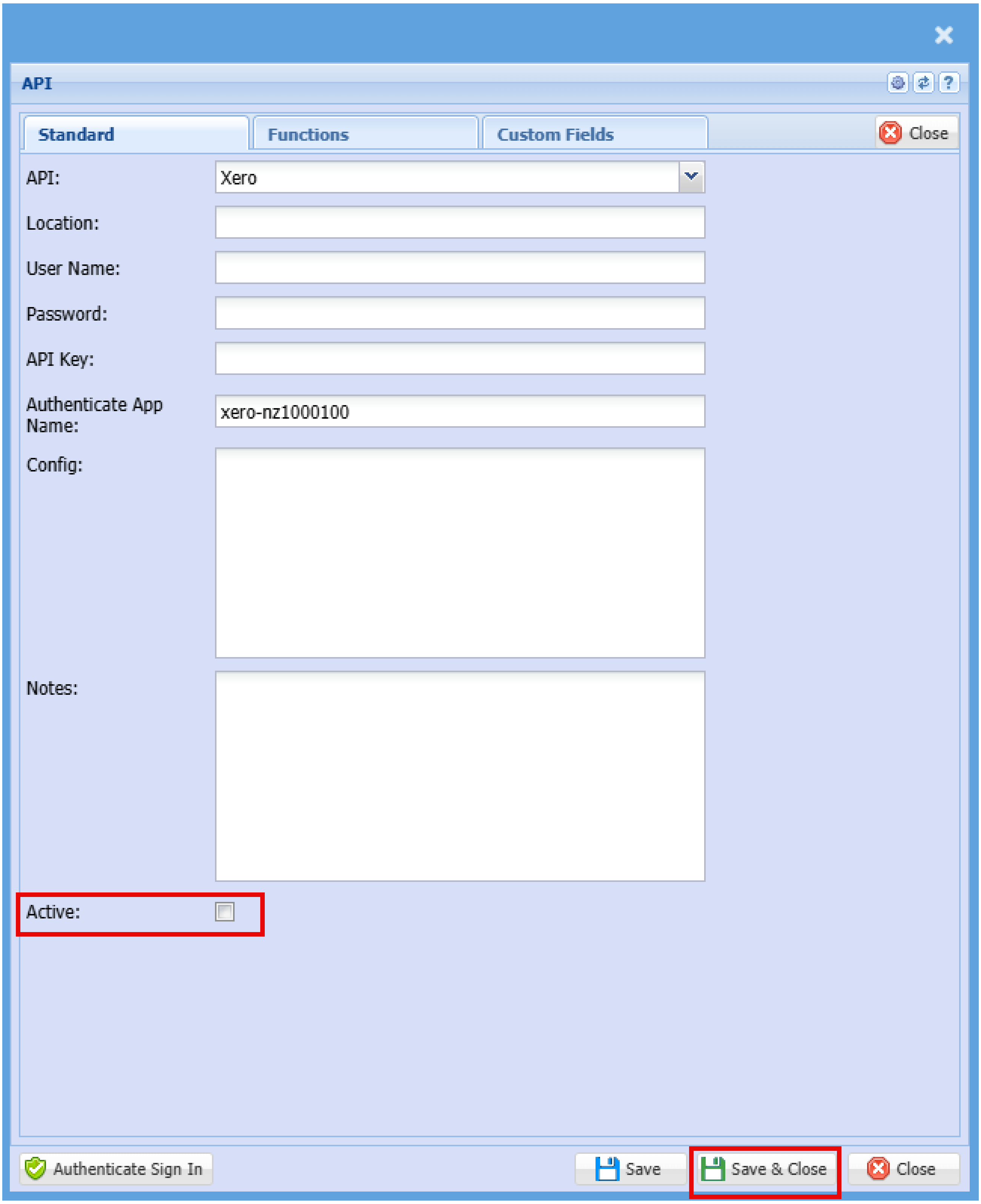
System Configuration > Security >API Setup

Click Search

Double click on Xero to open



Untick the Active Box and click save and close



Failed to post to Xero

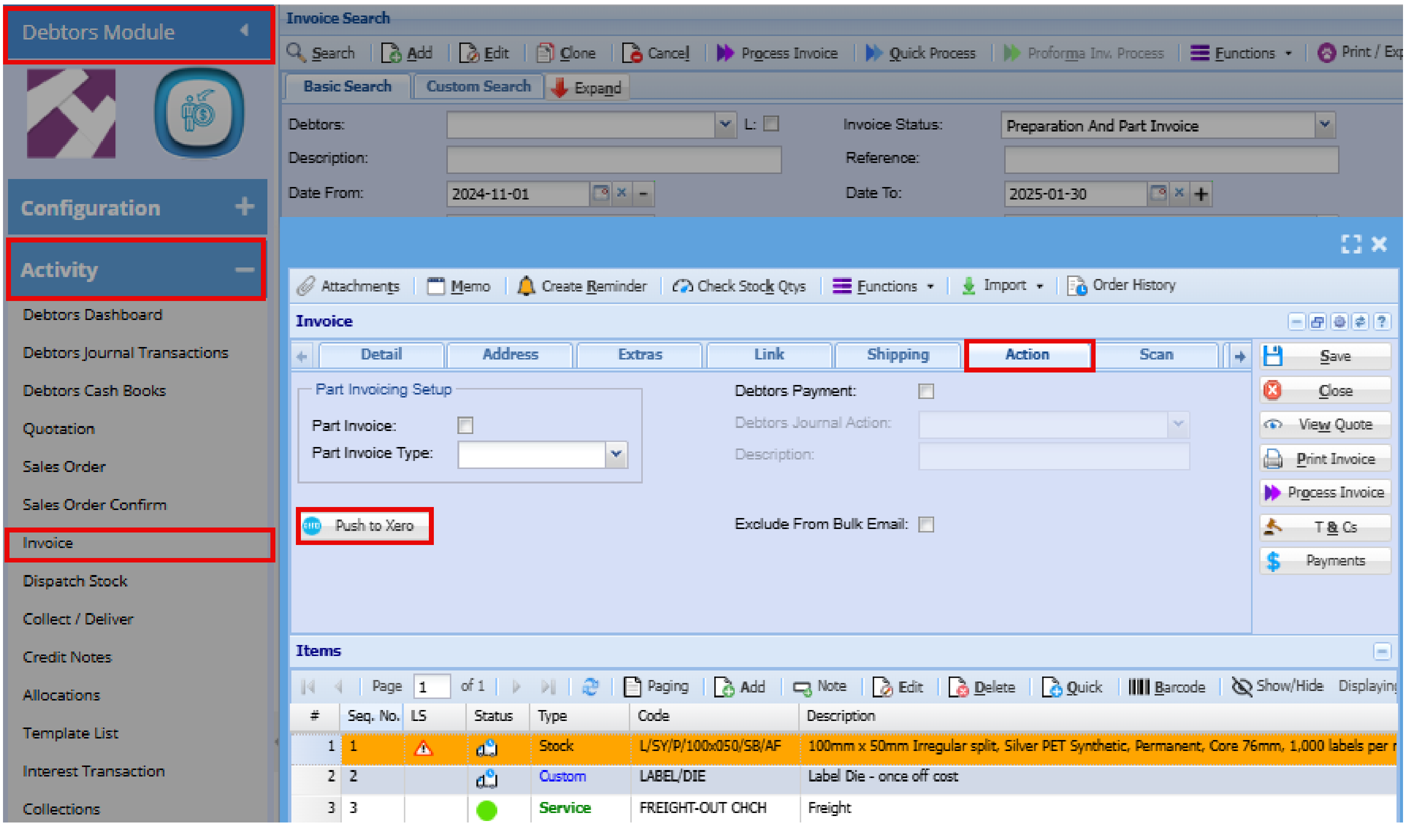
Invoice

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.



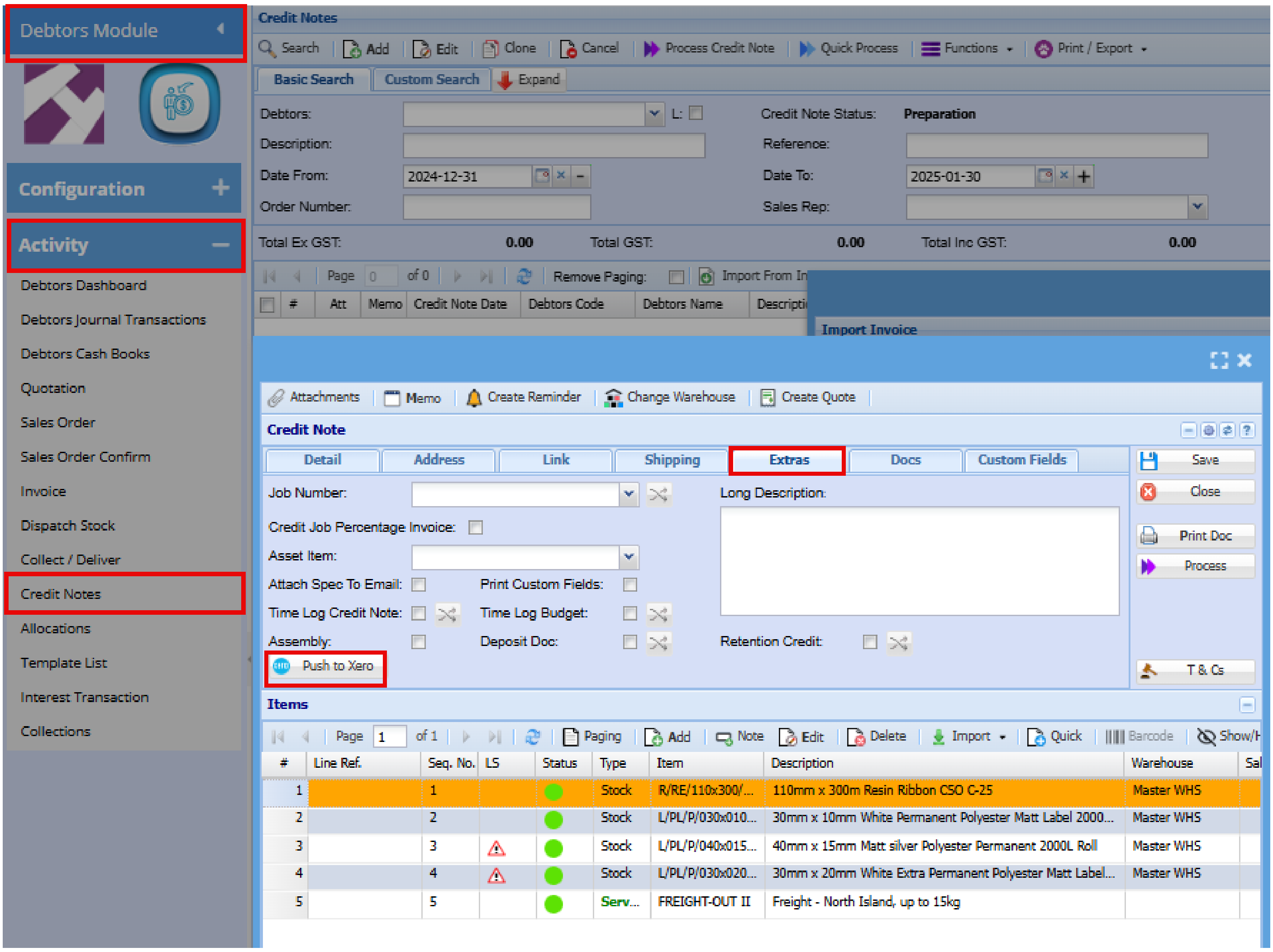
Credit Note

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.



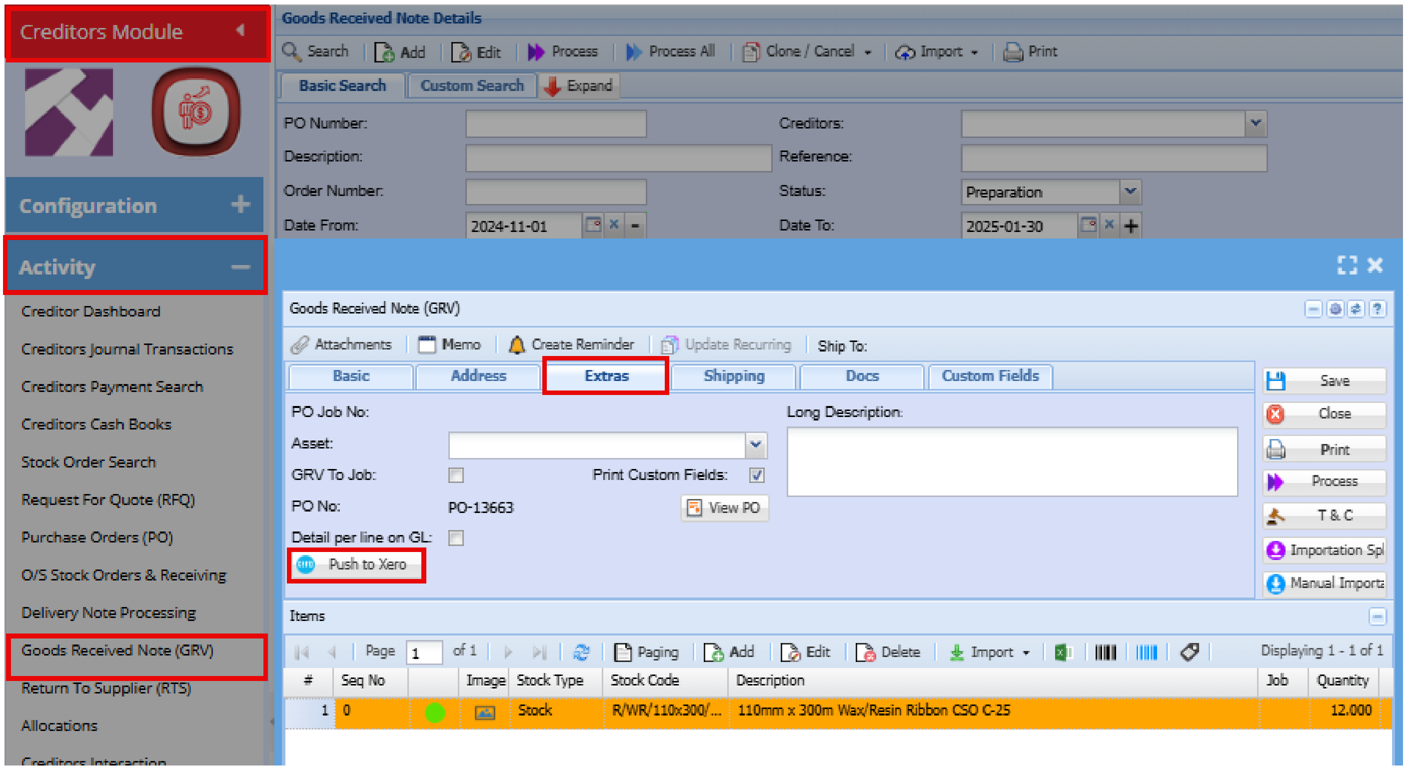
GRV

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

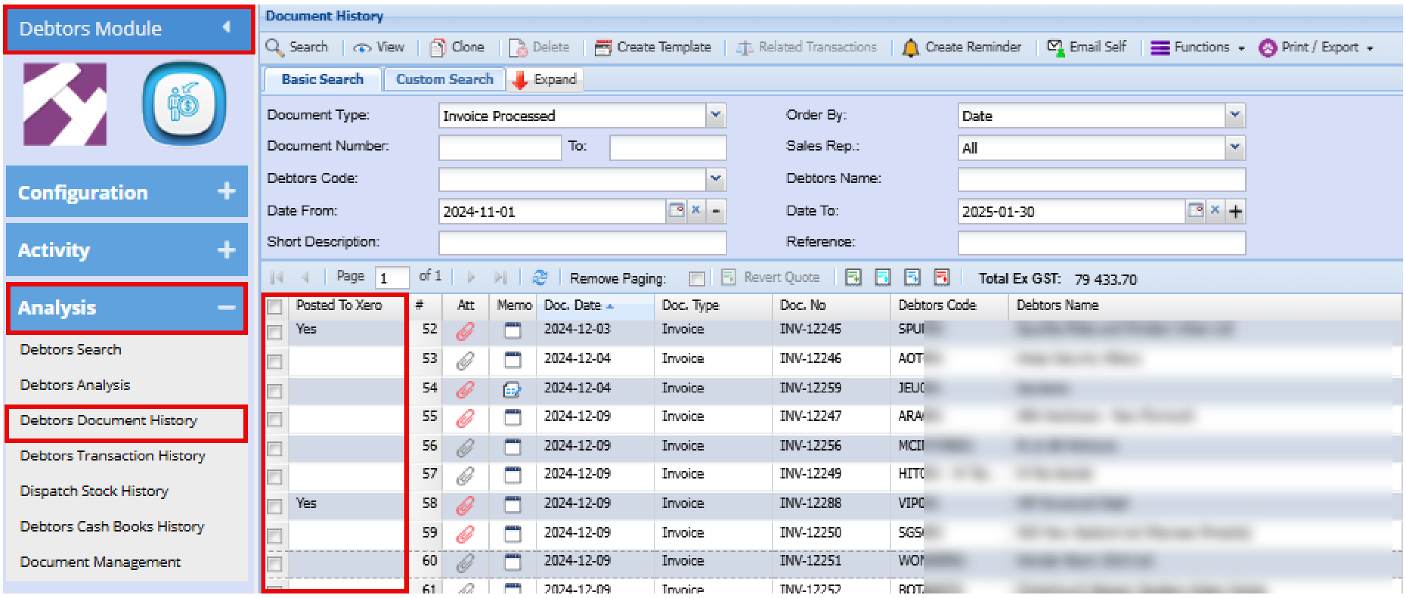
Click the "Action" Tab, you will see the button "Push to Xero" by clicking this button the transaction will be pushed to Xero.

View Posted and Non posted Transactions

Debtors

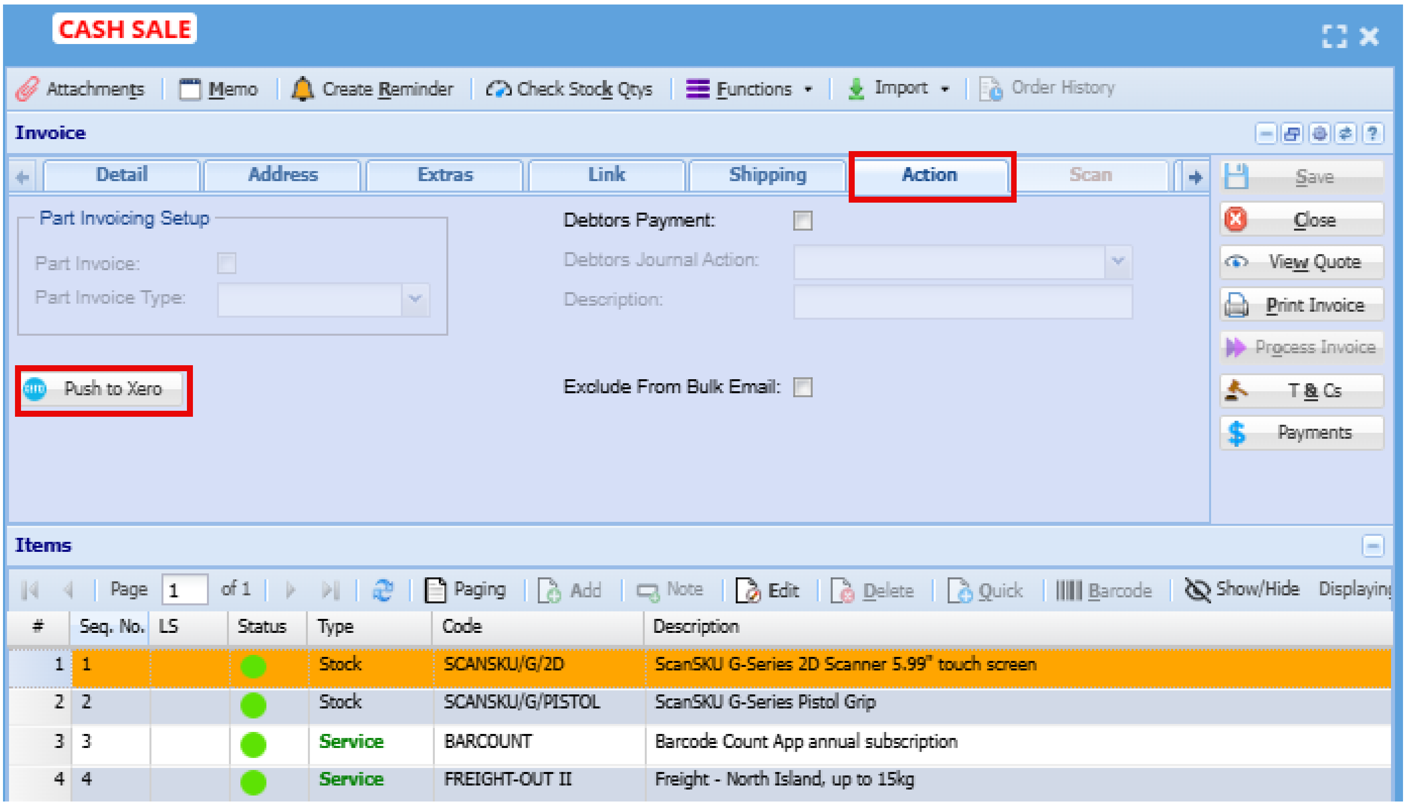
Debtors Module > Analysis >Debtors Document History

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



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.

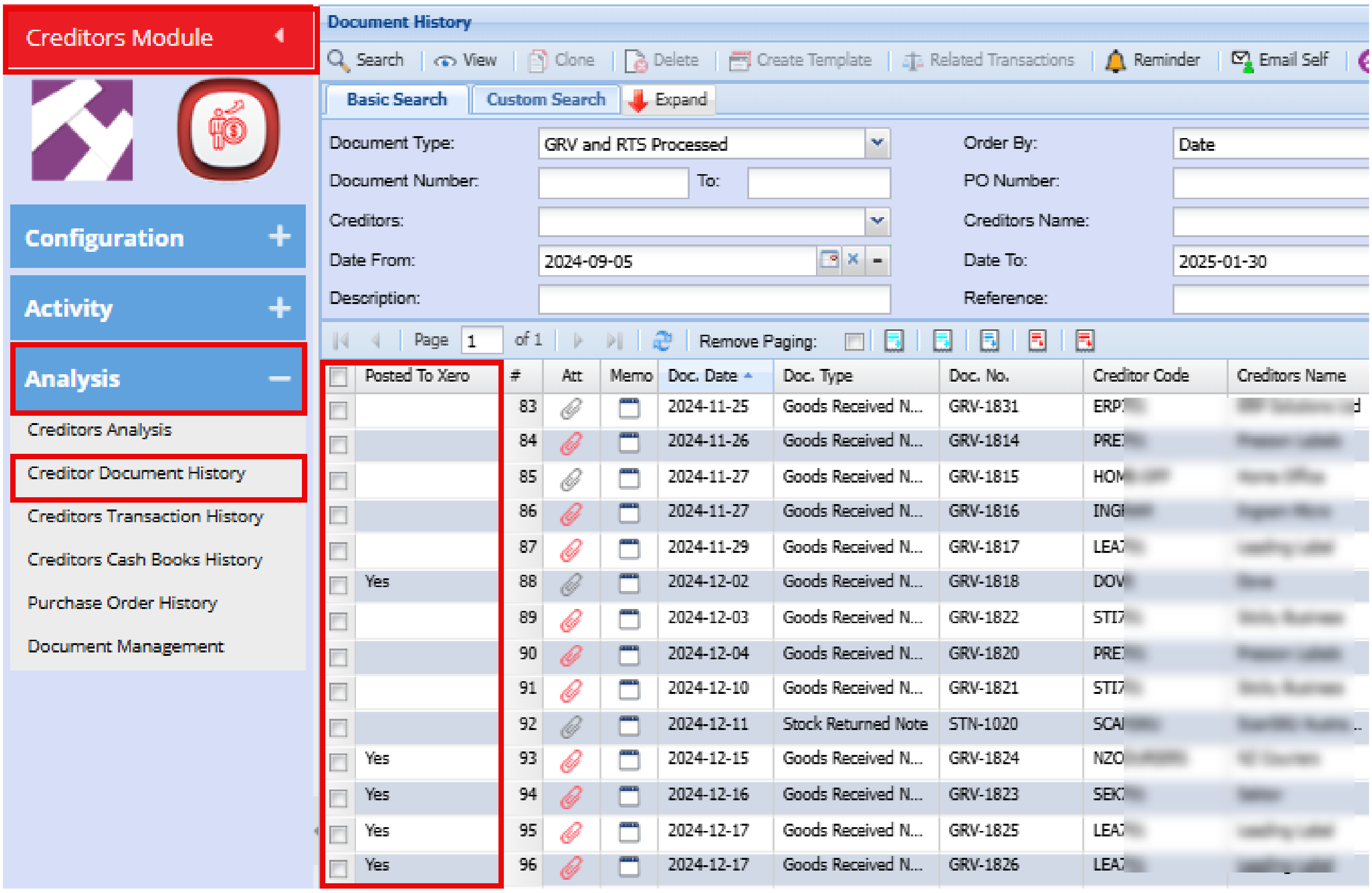


> Double check your transaction is not already in Xero as clicking this will duplicate the transaction if it was already posted

Creditors

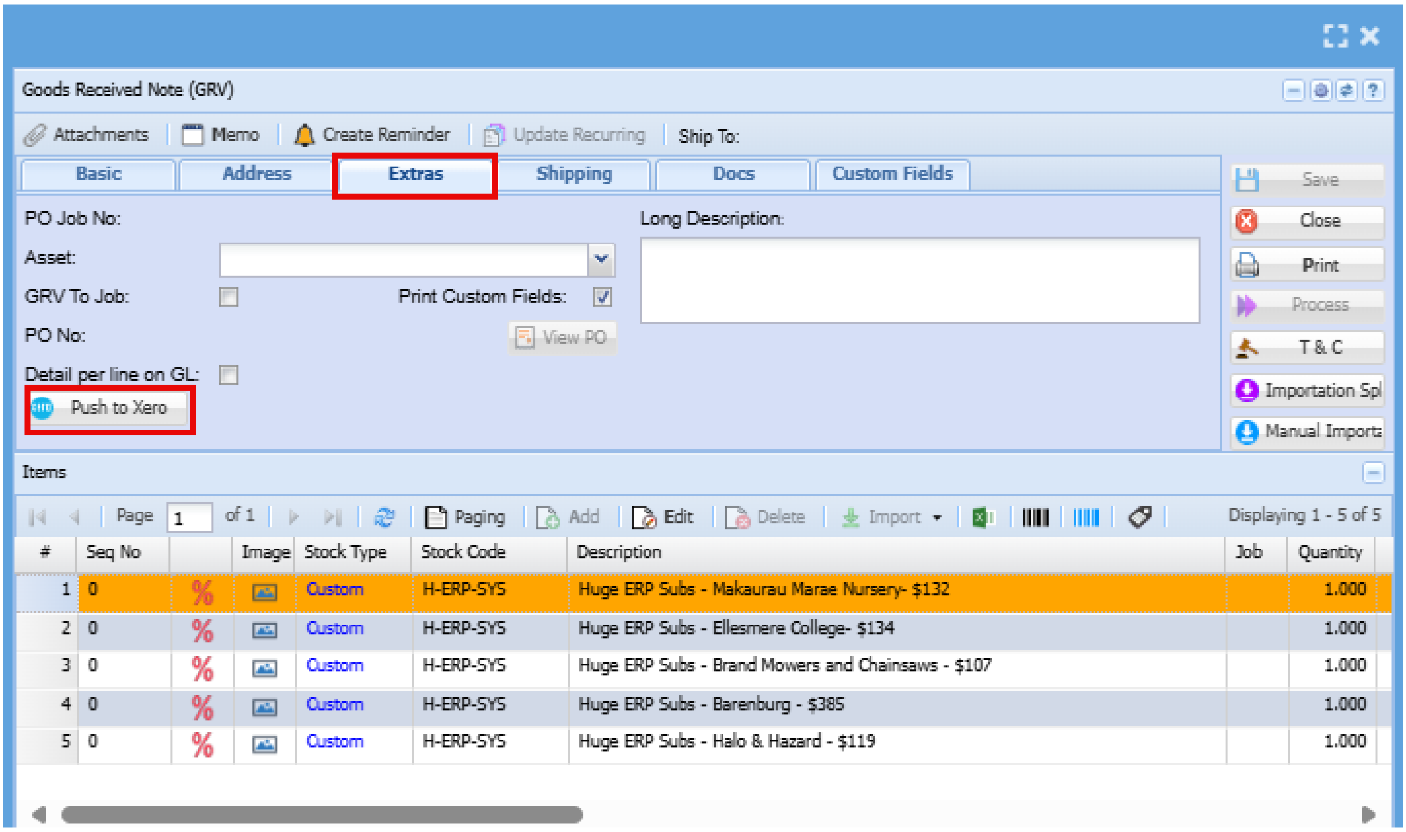
Creditors Module > Analysis >Creditors Document History

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



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.



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