Setting up Xero Integration

Last Modified on 02/02/2024 11:33 am CST

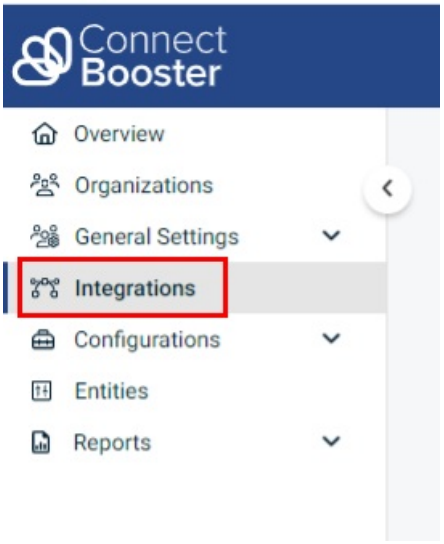
Exciting news! Our ConnectBooster Support documentation is moving to a new location. Be sure to bookmark the new link below.

https://help.cb.kaseya.com/help/Content/0-HOME/Home.htm

Login

Login to your ConnectBooster portal.

- Navigate to Integrations.



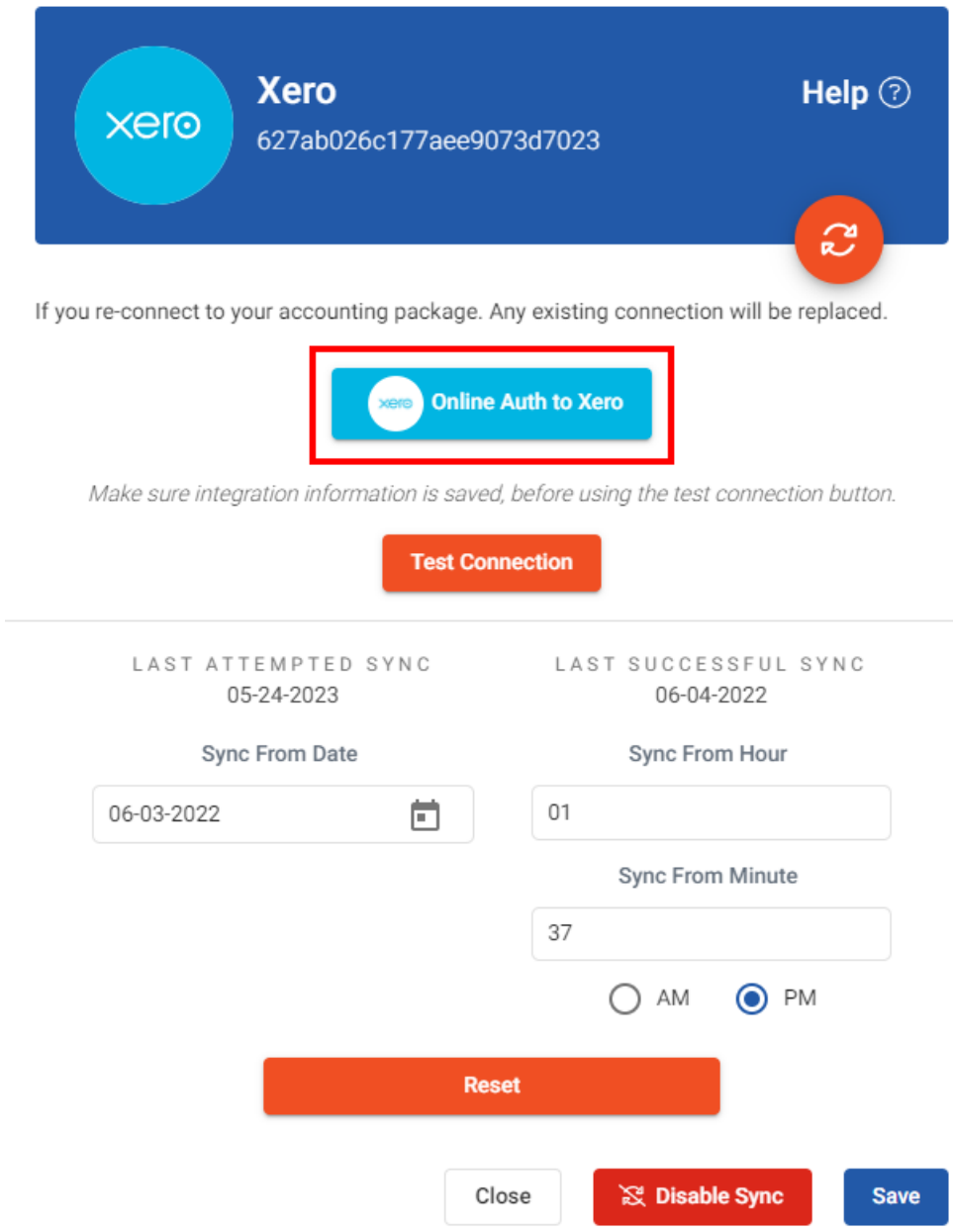
New Integration

Please contact support for inquiries about creating NEW integrations or CONVERTING current platforms, as this needs to be done internally.

Online Authentication

Click the "Online Auth to Xero" button.

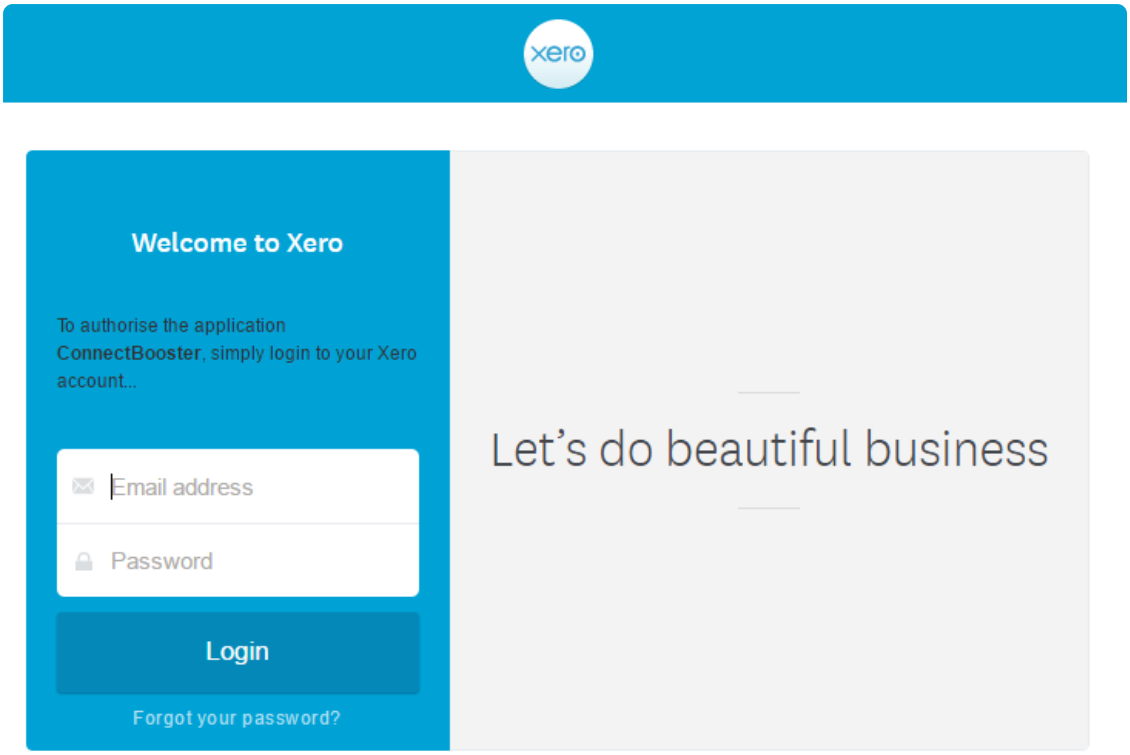
- This will open a new browser tab, prompting you to login to your Xero account.



Authorize Permissions

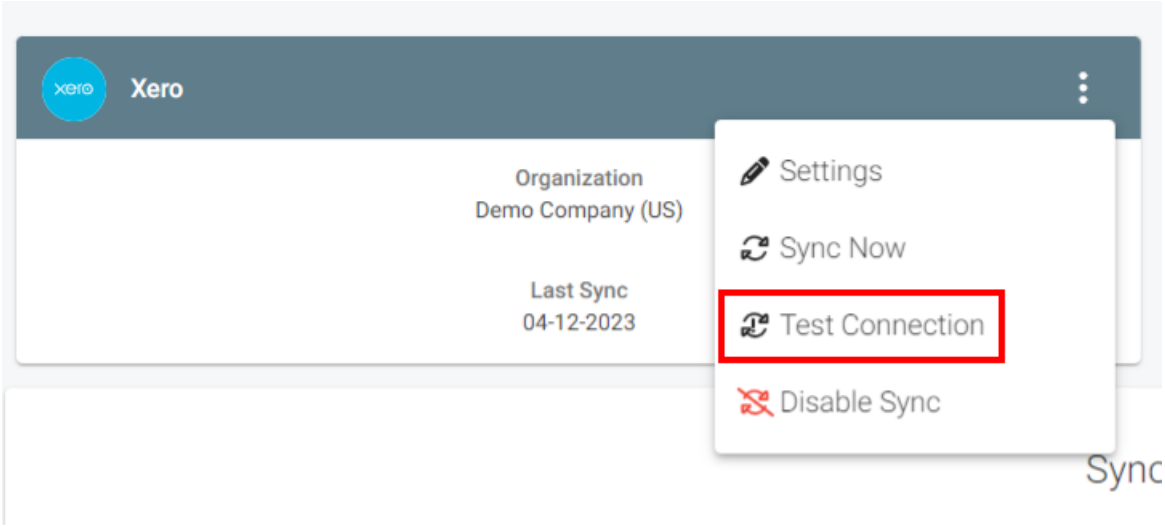
4. Login to Xero

- Authorize the permissions, and "Save" your changes.



Test Connection

Use "Test Connection" to make sure the integration is properly configured.



Note: "Sync Now" will kick off a sync, otherwise within the hour the synchronization will automatically happen

Congratulations !! You are now finished with setting up Xero as your accounting package!

Re-Authorization *(Handling Disconnections and Reconnections)*

If your syncs are failing due to an authentication issue you can re-authorize your Xero Integration by repeating the steps above.