

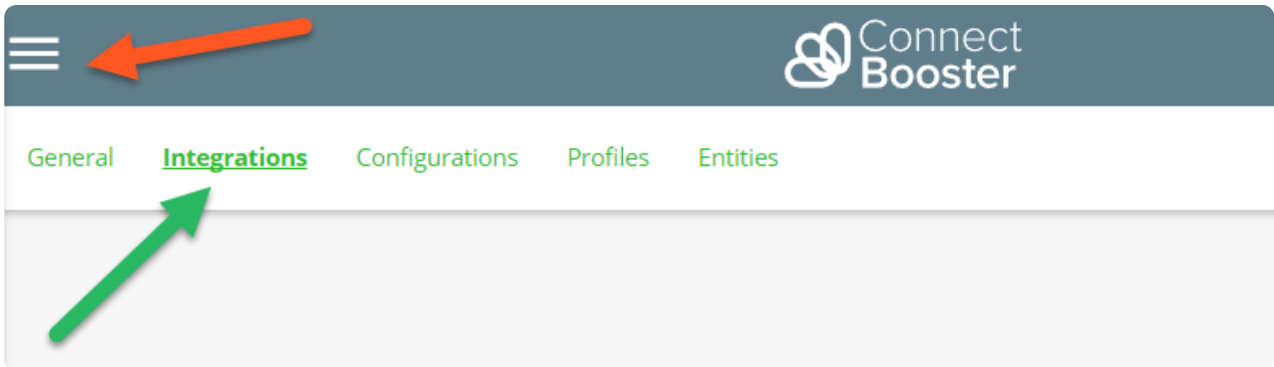
Setting up Xero Integration

Last Modified on 03/13/2019 3:21 pm CDT

Login

Login to your ConnectBooster portal.

- Under the top left three bar menu , navigate to Settings + 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 Authentication" button.

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

The screenshot displays the Xero integration interface. At the top left, there is a blue circular logo with the word "xero" in white, followed by the text "Xero" and a long alphanumeric string "57fd3bca38cc142b0021c09c". An orange arrow points from the logo area towards the "ONLINE AUTHENTICATION" button. In the top right corner, there is a green circular button with a white refresh icon. Below the header, there are two green buttons: "ONLINE AUTHENTICATION" and "TEST CONNECTION". A horizontal line separates this section from the sync status section. The sync status section contains two columns: "LAST ATTEMPTED SYNC" with the value "6/5/17 @ 3:50PM" and "LAST SUCCESSFUL SYNC" with the value "6/5/17 @ 3:51PM". Below these, there is a "SYNC FROM DATE" section with the value "06/04/2017 03:51 PM" and a "RESET" button. At the bottom of the interface, there are three buttons: "DISABLE SYNC" (with a red icon), "DELETE", and "CLOSE".

Authorize Permissions

4. Login to Xero

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



Welcome to Xero

To authorise the application
ConnectBooster, simply login to your Xero
account..

✉ Email address

🔒 Password

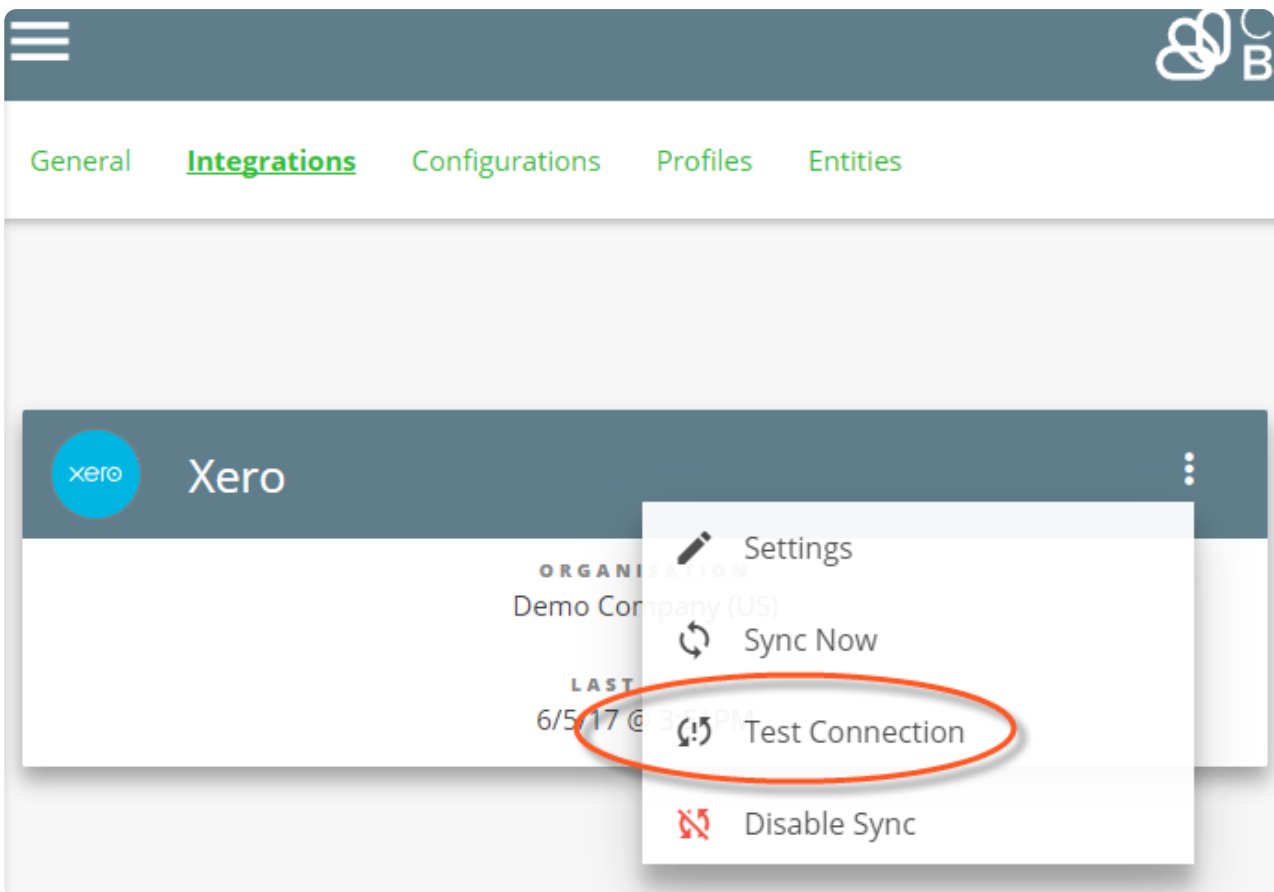
Login

[Forgot your password?](#)

Let's do beautiful business

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.
