



# Xero API Guide

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## The Xero API interface

The Xero API interface allows users to export PowerPro Invoices and Payments to a Xero account.

### How the interface works

The interface filters Invoices and Payments according to a date window specified by the user. It then connects to the RTO's Xero database using the Xero API and uploads the Invoices and Payments directly into Xero. The Invoices should display in Xero immediately.

### Enabling user access to the Xero API interface

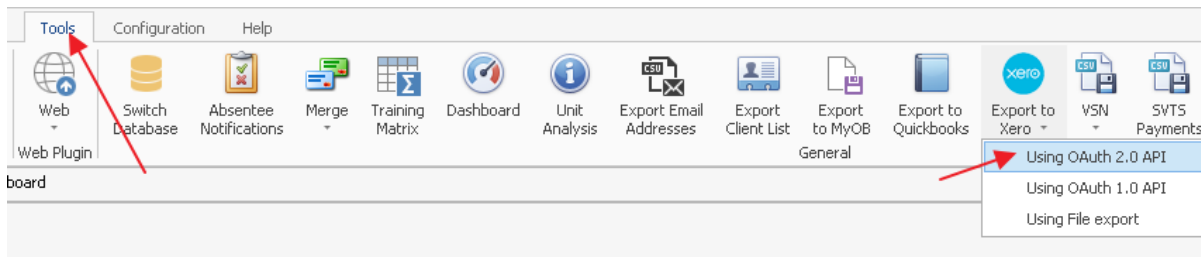
To access the Template Manager users must belong to a user group with the "Export to Accounts Ledger" action granted:

The screenshot shows the 'User Roles and Actions' configuration window. On the left, a list of roles is shown with 'Admin Users' selected. On the right, the 'Admin Users' role is selected, and a table of actions is displayed. The 'Export Invoices and Payments to Account Ledger' action is checked in the 'Allowed' column.

Allowed	Action description
▶	18 - Training Organisation
▶	19 - Application Options
▶	20 - AVETMISS and RAPT Defaults
▲	21 - Other
<input checked="" type="checkbox"/>	Open the Training Matrix window
<input checked="" type="checkbox"/>	Open the Dashboard window (charts)
<input checked="" type="checkbox"/>	Open the Template Manager
<input checked="" type="checkbox"/>	Open the "Printable Forms" menu
<input checked="" type="checkbox"/>	Export Client List
<input checked="" type="checkbox"/>	Export to MyOB
<input checked="" type="checkbox"/>	Export Invoices and Payments to Account Ledger
<input checked="" type="checkbox"/>	Generate/Export Vet Fee-Help files
<input checked="" type="checkbox"/>	Launch database backups
<input checked="" type="checkbox"/>	Adjust own Colour Scheme
<input checked="" type="checkbox"/>	Edit/Modify Bookmarks

## Launching the Xero API interface

The Xero API interface is launched from the Tools tab using the Export to Xero>Using OAuth 2.0 API menu option:



## Obtaining the Xero API credentials

In order to access their Xero database, Organisations are required to:

1. Login to their Xero account
2. Create an App in Xero using <https://developer.xero.com/myapps> as follows:

### Add a new app ✕

**App name**

**OAuth 2.0 grant type**

<b>Auth code</b> Web app	<b>Auth code with PKCE</b> Mobile or desktop app
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[Learn more about grant types](#)

**Enter your business web site here**

**Company or application URL**

**Privacy policy URL (optional)**

**Type this one exactly as this:**

**OAuth 2.0 redirect URI**

[Add another URI](#)

I have read and agree to the [Xero Developer Platform Terms & Conditions](#)

3. Once you create the App, the following page is displayed:

## App details

App name

PowerProRTO

Company or application URL

https://powerprorto.com.au

Privacy policy URL (optional)

## OAuth 2.0 credentials

OAuth 2.0 redirect URI

http://localhost:55568/

[Add another URI](#)

Client id

gF\*\*\*\*\*ED



[Copy](#)

[Generate a secret](#)

[Save](#)

4. Ignore the Client id field for now. Click on Generate a secret. The following page loads:

## OAuth 2.0 credentials

### OAuth 2.0 redirect URI

http://localhost:55568/

[Add another URI](#)

### Client id

gF\*\*\*\*\*ED



[Copy](#)

### Client secret

X\*\*\*\*\*



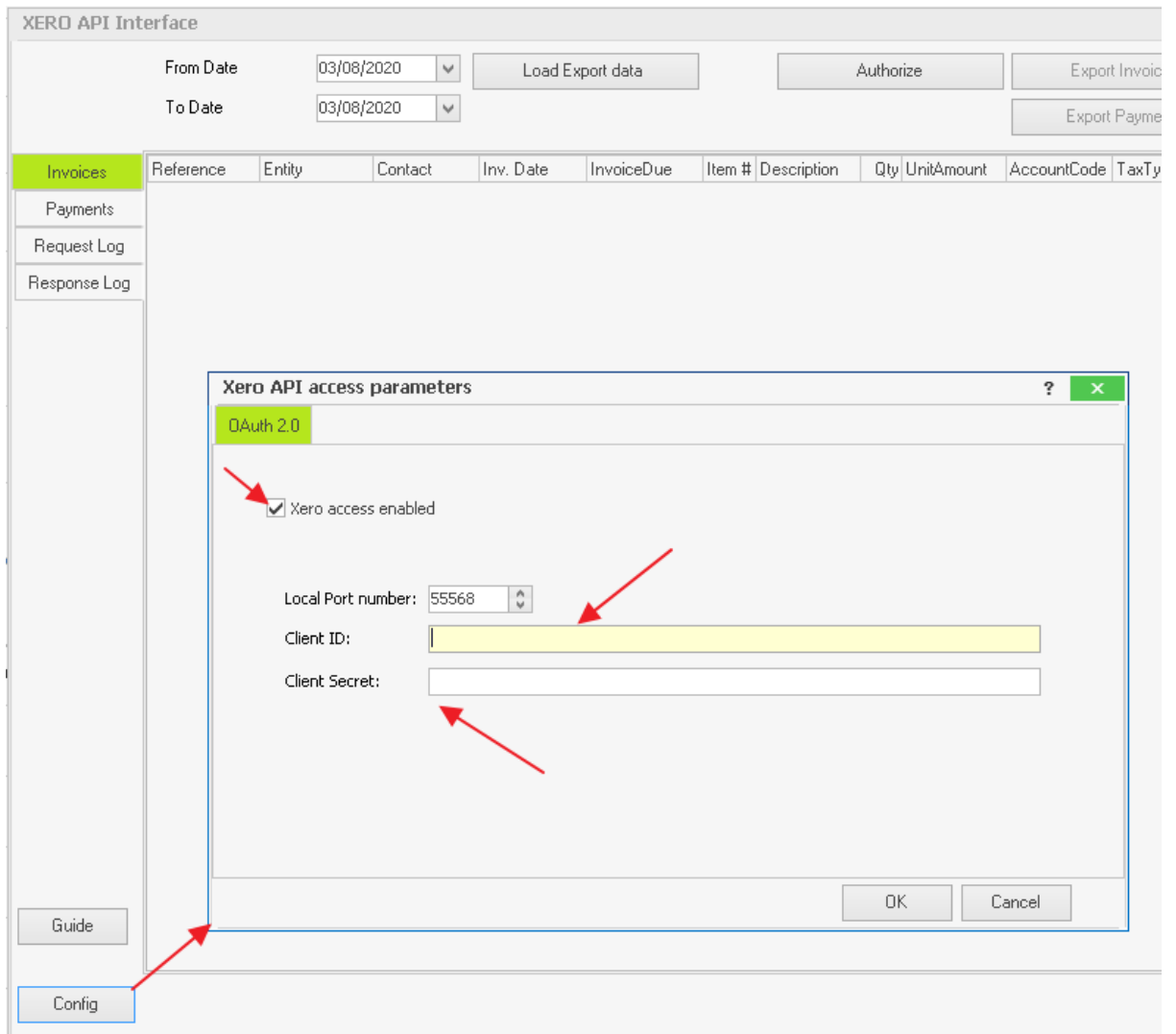
[Copy](#)

Make sure to copy and paste your new secret immediately.

You won't be able to see it again.

[Save](#)

5. Now, using the blue “Copy” buttons that copy each field to the Clipboard, Copy & Paste the above Client id and Client Secret to PowerPro>Tools>Export to Xero>Using OAuth 2.0 API:



6. Ensure you go back to the Xero API page and press "Save".
7. Done. The configuration is now complete.



## Customisations

The Invoice and Payment export scripts can be adjusted for each RTO. Examples of configuration include setting a default Account Code of 200 and a default Invoice Status of “Authorised”.

Vidatek, with the help of the RTO Xero user, will customise these scripts if necessary.

## The data export

It is vital to export the Invoices prior to exporting the Payments. The reason for this is that some of the exported payments might relate to the Invoices being exported and Xero will decline the payment if the Invoice cannot be found.

## Logging

The Xero interface tool logs all activity to the graphical user interface. Any errors returned from Xero are easily identified on the screen:

Description	Qty	UnitAmount	AccountCode	TaxType	TaxAmount	Export	Xero Result
Cert. III in Mus	1	1200	200	EXEMPTOL	0	<input type="checkbox"/>	OK
Cert. III in Mus	1	400	200	EXEMPTOL	0	<input type="checkbox"/>	OK
Cert. III in Mus	1	1200	200	EXEMPTOL	0	<input checked="" type="checkbox"/>	Invoice not of valid status for modification This document cannot be edited as it has a payment or credit note allocated to it.
Cert. III in Mus	1	1200	200	EXEMPTOL	0	<input checked="" type="checkbox"/>	
Enrolment fee	1	265	200	EXEMPTOL	0	<input checked="" type="checkbox"/>	Invoice not of valid