

## 2. Xero Integration User Guide

Thank you for purchasing our extension. If you have any questions that are beyond the scope of this document, do not hesitate to leave us an email via [support@magenest.com](mailto:support@magenest.com)

By: Magenest | Support Portal: <http://servicedesk.izysync.com/servicedesk/customer/portal/26>

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## Introduction

**Xero Integration extension for Magento 2** is a great tool that allows you to synchronize accounting data automatically from Magento 2 store to Xero Website.



## Features

- Sync customer data from Magento 2 store to Xero both manually and automatically.
- Sync product data from Magento 2 store to Xero both manually and automatically.
- Sync order data from Magento 2 store to Xero both manually and automatically.
- Sync invoice data from Magento 2 store to Xero both manually and automatically.
- Sync Credit Memos from Magento 2 store to Xero both manually and automatically.
- Allow admin to view sync history log to see what is synchronized between two apps.
- Allow admin to manage the sync queue to see what will be synchronized next.
- Allow admin to request a report on the Backend of Magento 2.
- Support multiple-website
- Add to queue mass action in customer listing, product listing, order/invoice listing, and credit memo listing
- Sync to Xero mass action in customer listing, product listing, order/invoice listing, and credit memo listing

## System Requirements

Your store should be running on **Magento 2 Community Edition version 2.3.x and 2.4.x**

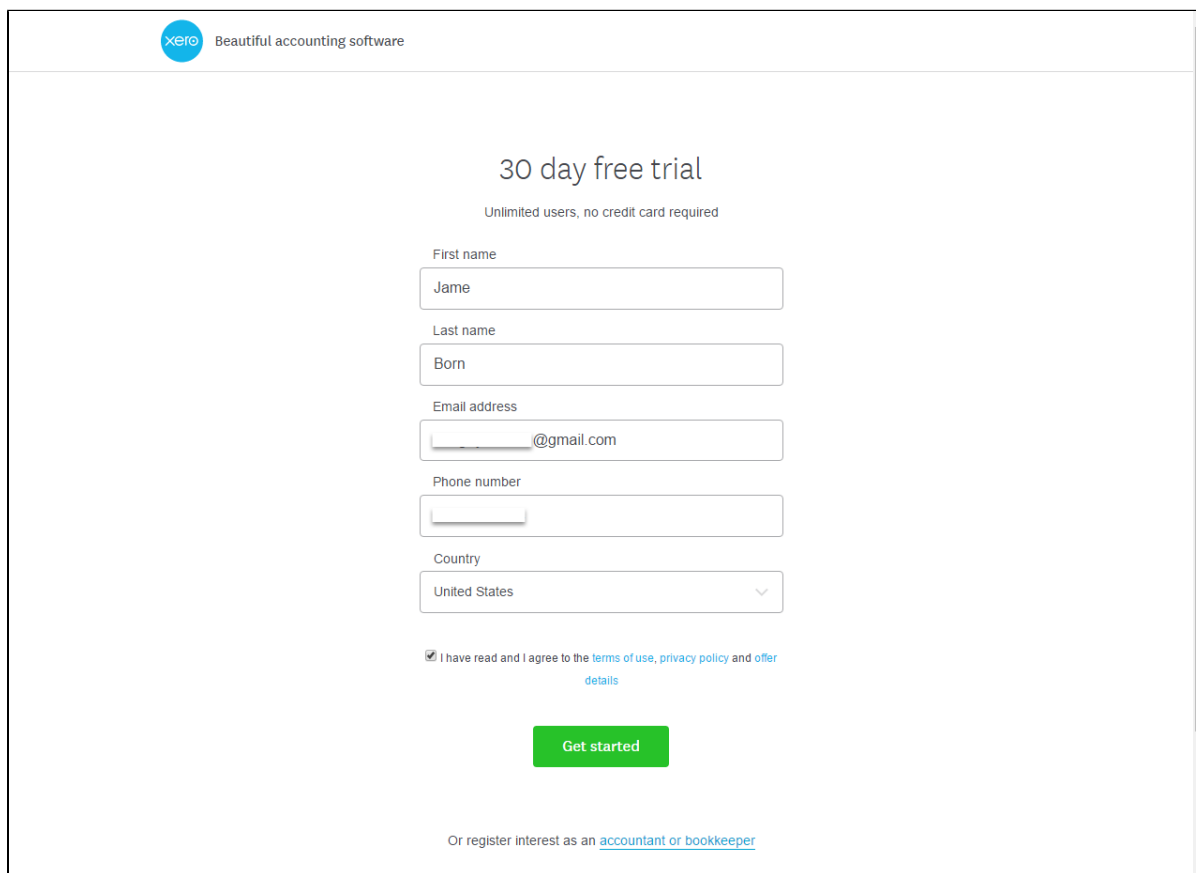
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## How to create a new consumer key

Video Tutorial

First, you need to create a Xero consumer key to connect from Magento 2 to Xero if you haven't got one. Go to <https://www.xero.com/> and register a Xero accounts (click on "Try Xero for free" or "Free Trial").

Fill in the required information click on "Get started". If everything goes right, Xero sends you an account activation email.



The screenshot shows the Xero website's registration page for a 30-day free trial. At the top, the Xero logo and tagline "Beautiful accounting software" are visible. The main heading is "30 day free trial" with the subtext "Unlimited users, no credit card required". Below this, there are several input fields: "First name" (containing "Jame"), "Last name" (containing "Born"), "Email address" (containing a redacted email followed by "@gmail.com"), "Phone number" (containing a redacted number), and "Country" (a dropdown menu set to "United States"). A checkbox is checked, indicating agreement to the terms of use, privacy policy, and offer details. A prominent green "Get started" button is centered below the form. At the bottom, there is a link to "Or register interest as an accountant or bookkeeper".

Xero Beautiful accounting software

## 30 day free trial

Unlimited users, no credit card required

First name  
Jame

Last name  
Born

Email address  
[redacted]@gmail.com

Phone number  
[redacted]

Country  
United States

☒ I have read and I agree to the [terms of use](#), [privacy policy](#) and [offer details](#)

[Get started](#)

Or register interest as an [accountant or bookkeeper](#)

When your account is activated, you can log in on the page <https://login.xero.com/>.



## Welcome to Xero

Your email or password is incorrect

Login

[Forgot your password?](#)

## Better protect your Xero data with two-step authentication



 Play video

[Learn More](#)

Don't have a login? [Try Xero for free](#)

[Terms of use](#) [Privacy](#)

If you log in to the account for the first time, Xero will ask you to create an organization. Enter the details of your organization. Press on Start Trial, or Buy Now to continue.



Logout

### Add your organization to start using Xero now

What is the name of your organization?

Where does your organization pay taxes?

United States

What is your time zone?

(UTC-05:00) Eastern Time (US & Cana

What does your organization do?

Currently using QuickBooks?[Convert your QuickBooks file for free](#)

Start Trial

 or 

Buy Now

[Try the Demo Company \(US\)](#) Have a play, try out new features and get familiar with Xero.

Now you can create a new consumer key for Xero account. There are two types of Application Mode you can choose: **Private Application Mode** or **Public Application Mode**

## For Private Application Mode

In order to create a new consumer key for private app mode, you need to have the public key first. There are two ways for you to get the public key:

- + You can use the public key file attached to our extension.
- + Or please follow the steps below to create a new one:

Go to <http://developer.xero.com/> > Docs then search with **Create a public/private key pair**

XERO DEVELOPER Docs SDKs Previewer My Apps Community Partner Media

1

2

Search Create a public/private key pair

### Search Results for 'Create a public/private key pair'

About 7 results (0.72 seconds)

3

[Create a public/private key - How-to Guides | Xero Developer](#)  
Private and Partner applications must sign messages using the OAuth RSA- SHA1 method. This requires that you create a public/private key-pair, and upload the ...

[Private Applications - Auth and Limits | Xero Developer](#)  
Private applications use the RSA-SHA1 signature method. You will need to generate a public/private key-pair, of which the public part will be uploaded to Xero ...

[OAuth Issues - Auth and Limits | Xero Developer](#)  
Resolution: Create a new connection with the new demo company, or in the ... This can be encountered if the public private key pair X509 certificate used for ...

[Entrust Certificate Deprecation - Auth and Limits | Xero Developer](#)  
... Optional: Remove Entrust SSL certificates when creating an instance of http ... at http://app.xero.com and continue using the same public/private key pair for ...

[Partner Applications - Auth and Limits | Xero Developer](#)  
Partner applications are public applications that have been upgraded to support long term access ... To do this you need to generate a public/private key pair.

[Development accounts - Getting Started | Xero Developer](#)  
Below is a rundown of the key differences between the demo company and a Xero trial organisation. Xero trial ... If you're using a Private application you will need to setup the application as per usual. When the ... Public & Partner Applications.

[API Application Types - Getting Started | Xero Developer](#)  
Xero has three types of API applications: Private, Public and Partner. The authorisation process is different depending on the type of application you use The ...

1

 **Dev Blog**  
News and Updates from the team

 **Roadmap**  
See what we're working on next

 **GitHub**  
Find our SDKs and other source code

 **Questions**  
Ask about our API on Stack Overflow

 API Status Terms Privacy

Create a public/private key pair page appears as below. Follow the user guide of Xero to get 2 file: **public key(.cer)** and **private key(.pem)**.

The screenshot shows the Xero Developer documentation page for creating a public/private key pair. The page has a dark header with navigation links: XERO DEVELOPER, Docs (highlighted), SDKs, Previewer, My Apps, Community, Partner, and Media. A left sidebar contains a 'How-to Guides' dropdown and a list of guides, with 'Create a public/private key' selected. The main content area is titled 'Create a public/private key pair' and includes an 'Overview' section explaining the OAuth RSA-SHA1 method. It provides instructions for Windows users (downloading OpenSSL) and Mac users (using Terminal). A code block shows the OpenSSL commands to generate a private key, a public key certificate, and a PKCS12 file. A list of steps explains the process: generating a private key, creating a certificate, and exporting to PKCS12. A note mentions Java libraries and a link to a guide. The page concludes with a reminder to note the certificate's expiry date.

XERO DEVELOPER Docs SDKs Previewer My Apps Community Partner Media

How-to Guides

Integration Best Practices  
Certification Checklist  
Branding Your Integration  
Deep link to Xero  
**Create a public/private key**  
Rounding in Xero  
Accounting for Inventory  
Xero Tracked Inventory  
Processing Payments  
Conversions Guide  
CRM and Xero

## Create a public/private key pair

### Overview

Private and Partner applications must sign messages using the OAuth RSA-SHA1 method.

This requires that you create a public/private key-pair, and upload the public certificate during application registration. We refer to this certificate as an application certificate.

To get started with creating a public/private key-pair we recommend the use of [OpenSSL](#).

### Windows users

[Download OpenSSL for Windows](#)

To run the commands below, go to the OpenSSL32 directory on your PC, and change to the /bin directory.

**Notes:**

- You may need to open the command prompt with admin privileges (Run as administrator)
- If OpenSSL has just been installed, you might need to restart your computer before it can generate certs

### Mac users

OpenSSL comes shipped with Mac OS X version 10.6.2 onwards. You can use Terminal to run OpenSSL (search for 'terminal' using the search bar in the top right of your screen on your desktop) to open the terminal window and then run the commands below.

**Notes:**

- You may need to run each OpenSSL command lines with elevated privileges - add `sudo` before each command lines

### Using OpenSSL

The basics command line steps to generate a private and public key using OpenSSL are as follows:

```
openssl genrsa -out privatekey.pem 1024
openssl req -new -x509 -key privatekey.pem -out publickey.cer -days 1825
openssl pkcs12 -export -out public_privatekey.pfx -inkey privatekey.pem -in publickey.cer
```

- Step 1: generates a private key
- Step 2: creates a X509 certificate (.cer file) containing your public key which you upload when registering your private application (or upgrading to a partner application).
- Step 3: Export your x509 certificate and private key to a pfx file. If your chosen wrapper library uses the .pem file to sign requests then this step is not required.

**Note:** If you are using Java libraries which require extracting the private key in PKCS8 format, please refer [here](#).

Please make a note of the expiry date of your certificate as you will need to upload a replacement in the Xero Developer Center before the expiry date to ensure uninterrupted service.

When you have file **public key.cer**, please go to <https://app.xero.com/Application> to create the Application.

Choose **Private** application mode, application name (the name for the application is not very important), choose your organization (this is where the Magento 2 data will be synced into). You need to copy and paste the content or upload the file **Public key.cer** into **X509 Public Key Certificate** field.

Check the information again then choose "I have read and agree to the Xero Developer Platform". After that click **Save** button.

DEVELOPER

Docs

SDKs

Previewer

My Apps

History

Community

Partner

Media

My Applications

Add an Application

Getting started with the Xero Developer Platform

Hide Getting Started



Watch the API tour  
(2 minutes long)

- Try the Accounting API Previewer or the Payroll API Previewer to see the API in action
- Register your own application
- Refer to our Developer Centre for our API Reference and code samples
- Review the developer platform terms and conditions before using Xero developer platform features.

Setup an Application

Are you developing a Public or Private application?

☐ Public - for use with any organisation that authorises you

☒ Private - just for use with my own organisation

Application Name

Test for private app mode

Please select which organisation your application can access:

Magenest

X509 Public Key Certificate

☐ Paste In

☒ Upload X509 certificate file (.cer)

Browse...

publickey.cer

☐ Enable Payroll API for this organisation

☒ I have read and agree to the Xero Developer Platform

Terms & Conditions

Save

Cancel

What is the difference between a Public and Private app?

Read our guide on [adding an application](#) on the Xero Developer Centre site.

Why do I need an X509 Public Key Certificate?

When using a private application, all calls to the Xero API must be signed using RSA-SHA1.

An X509 Certificate (containing the public key only) will need to be uploaded to Xero so that we can use this to verify the source of your API calls.

Read our guide on [adding an application](#) on the Xero Developer Centre site to learn more about creating a X509 public key certificate.

See the [Xero Developer Centre](#) for more information on OAuth authentication.

If everything goes right, you will see the following content. Click on the "Show" button to get the **Consumer Key** for **Private App Mode**.

DEVELOPER

Docs

SDKs

Previewer

My Apps

History

Community

Partner

Media

My Applications

Edit Application

✓

Your application details have been updated

Application added

Edit Details

Application Name

Test for private app mode

Selected Organisation:

Magenest

X509 Public Key Certificate

Subject

O=Internet Widgits Pty Ltd, S=Some-State, C=AU

Valid From

6/1/2017 3:05:05 AM UTC

Valid To

5/31/2022 3:05:05 AM UTC

Thumbprint

FDBB1C2F739E5EEE5995D295E9B5812D65E5B841

[Upload a new Public Key Certificate](#)

☒ I have read and agree to the Xero Developer Platform

Terms & Conditions

Delete...

Save

Cancel

OAuth Credentials

Consumer Key

D9\*\*\*\*\*R1

Show

Consumer Secret

41\*\*\*\*\*KS

Show

[Regenerate Key and Secret](#)

Note, For Private applications, the consumer token and secret are also used as the access token and secret.

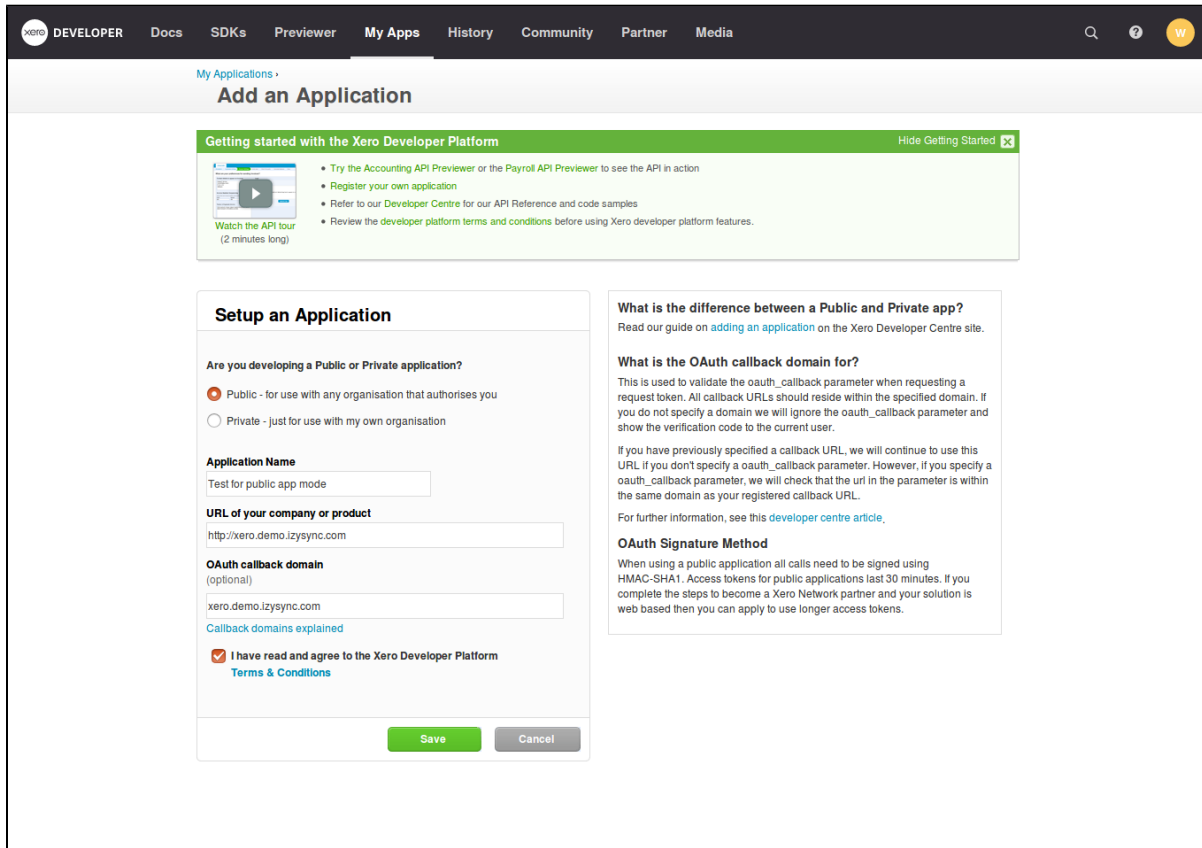
API Endpoint URL:

https://api.xero.com/api.xro/2.0/



## For Public Application Mode

Navigate to <https://app.xero.com/Application> to create the Application for Public Mode. You just need to enter Application Name, Url of your company or product and OAuth callback domain. Then **Save** button to finish.



The screenshot shows the 'Add an Application' page on the Xero Developer Platform. The page has a dark header with navigation links: DEVELOPER, Docs, SDKs, Previewer, My Apps (active), History, Community, Partner, and Media. Below the header, there's a 'My Applications' breadcrumb and a title 'Add an Application'. A green banner at the top says 'Getting started with the Xero Developer Platform' with a 'Hide Getting Started' button. Below this is a video player for 'Watch the API tour (2 minutes long)' and a list of links: 'Try the Accounting API Previewer or the Payroll API Previewer to see the API in action', 'Register your own application', 'Refer to our Developer Centre for our API Reference and code samples', and 'Review the developer platform terms and conditions before using Xero developer platform features.' The main form is titled 'Setup an Application' and contains two radio buttons for 'Are you developing a Public or Private application?': 'Public - for use with any organisation that authorises you' (selected) and 'Private - just for use with my own organisation'. Below are input fields for 'Application Name' (placeholder: 'Test for public app mode'), 'URL of your company or product' (placeholder: 'http://xero.demo.izysync.com'), and 'OAuth callback domain (optional)' (placeholder: 'xero.demo.izysync.com'). There's a link 'Callback domains explained' and a checked checkbox 'I have read and agree to the Xero Developer Platform Terms & Conditions'. At the bottom are 'Save' and 'Cancel' buttons. To the right of the form, there are two informational boxes: 'What is the difference between a Public and Private app?' and 'What is the OAuth callback domain for?'. The latter explains that the callback domain is used to validate the oauth\_callback parameter and that public applications last 30 minutes.

Last, click on **Show** button to take **Consumer Key** and **Consumer Secret** for **Public App Mode**.

---

## Configuration

### Set up Xero Account Informations

Go to **Store > Configuration** or **Xero Integration > Configuration**:

**Edit Application**

✓ Your application details have been updated

### Edit Details

**Application Name**  
Test for public app mode

**URL of your company or product**  
http://xero.demo.izysync.com/

**OAuth callback domain (optional)**  
xero.demo.izysync.com  
[Callback domains explained](#)

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

Delete... Save Cancel

### OAuth Credentials

**Consumer Key**  
E5\*\*\*\*\*VC Show

**Consumer Secret**  
G5\*\*\*\*\*DZ Show

[Regenerate Key and Secret](#)

**OAuth Request URLs**

**Request Token URL:**  
https://api.xero.com/oauth/RequestToken

**Authorise URL:**  
https://api.xero.com/oauth/Authorize

**Access Token URL:**  
https://api.xero.com/oauth/AccessToken

**API Endpoint URL:**  
https://api.xero.com/api.xro/2.0/

At My Applications tab

Taking **Consumer Key** that you have just created above and paste into Magento 2 backend configuration. Press **Save Config** after you've done (refresh the cache if needed). Then, click on **Connect Private App Now** button for private application mode or **Connect Public App Now** button for public application mode.



#### Note

You need to save config before connecting, this will help you avoid making errors.

Setting My Applications in Configuration of your Magento 2 store will base on their app mode types.

#### Private App Mode:

If you choose **Private** mode, you will have to enter the content of **Private Key(.pem)** and **Public Key(.cer)** beside **Consumer Key**

The screenshot displays the Magento 2 Configuration interface for Xero integration. The 'Configuration' title is circled in green. The left sidebar shows the 'INTEGRATION' menu item highlighted with a red box. The main content area shows 'Xero Account Informations' with a 'NOT CONNECTED' status. Fields for 'Consumer Key', 'App Mode' (set to Private), 'Public Key(.cer)', and 'Private Key(.pem)' are visible. A 'Connect Private App Now' button is at the bottom.

### Public App Mode:

If you choose **Public** mode, it will require both **Consumer Secret** and **Consumer Key**. The expiration for each connection time is 30 minutes. After that, you need to reconnect Magento 2 store to your Xero account.

The screenshot shows the Magento 2 Configuration page. The left sidebar contains navigation links: DASHBOARD, SALES, PRODUCTS, CUSTOMERS, MARKETING, CONTENT, **INTEGRATION** (highlighted with a red box), STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The main content area is titled 'Configuration' and includes a 'Store View: Default Config' dropdown and a 'Save Config' button. The 'Xero Account Informations' section is active, showing 'My Applications' with a 'Learn More' link. The 'Xero' application is listed with a 'Connection Status' of 'NOT CONNECTED'. Fields for 'Consumer Key', 'Consumer Secret', and 'App Mode' (set to 'Public') are visible. A warning message states: 'Warning: This version only supports Public & Private App'. A 'Connect Public App Now' button is present, with a note: 'Please save configuration before Connect'.

When Magento 2 store is connected with your Xero account successfully, connection status will be transferred from *not connected* to *connected* as below:

The screenshot shows the Magento 2 Configuration page with the Xero integration status updated to 'CONNECTED'. The 'Xero' application is listed with a 'Connection Status' of 'CONNECTED'. The 'Account Information' section is expanded, displaying the following details:

| Field            | Value                                |
|------------------|--------------------------------------|
| UserID           | 58dae05d-ca2d-4792-ab3e-895dc13ddf83 |
| EmailAddress     | support@magenest.com                 |
| FirstName        | William                              |
| LastName         | Moseley                              |
| UpdatedDateUTC   | 2017-05-08T02:35:46.673              |
| IsSubscriber     | true                                 |
| OrganisationRole | STANDARD                             |

A 'Disconnect' button is located at the bottom of the account information section.

At Configure the Accounts Types in Xero tab

The system will take four account types in the chart of account: **Bank account, Sale account, Inventory account, Cost and Good Sold account** from Xero account into Magento 2 store. Enter the name you would like to use for each account then click on **Add all Data to Queue**. The default Xero account name will be used if you do not change it. If there is no account on Xero site, the extension will automatically create a new one.

Dashboard

Sales

Catalog

Customers

Marketing

Content

Reports

Integration

Stores

System

Find Partners & Extensions

Configuration

Store View: Default Config

Save Config

GENERAL

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MAGENTEST

Xero

CUSTOMERS

SALES

DOTMAILER

SERVICES

ADVANCED

Xero Account Informations

My Applications

Learn More

Connection Status

Account Information

Disconnect

Account Mapping

Choose your Accounts to use in the integration.

Bank Account

Sales Account

Inventory Account

Cost of good sold Account

Synchronization Settings

Multiple Websites

Contacts

Items

Invoices

Credit Memos

Xero Integration Version

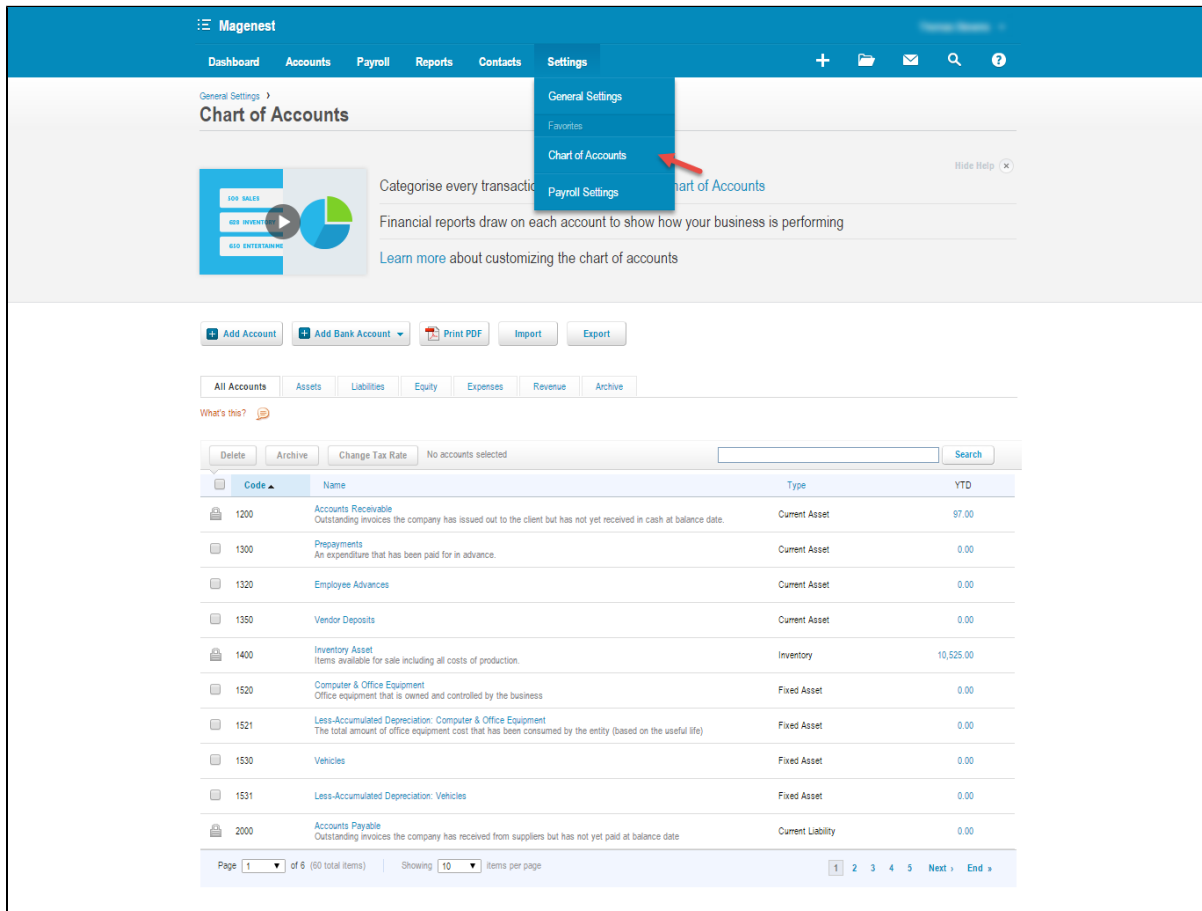
Version

Support Links

3.2.0

Installation Guide

Go to Installation Guide



## Set up Synchronization

Admins are able to choose which type of data to sync from Magento 2 to Xero: **Customers, Products(Items in Xero), Orders, Invoices, Credit Memos**. In addition, admins can choose the way to synchronize data Immediately use Cron Job. Admins can also **Add All data To Queue** or add **individual data group** queue for synchronizing.



## Configuration

Store View: Default Config

Save Config

### GENERAL

### CATALOG

### MAGENEST

### Xero

### CUSTOMERS

### SALES

### SERVICES

### ADVANCED

## Xero Account Informations

### Synchronization Settings

#### Customers

Enable Yes  
Sync Mode Cron Job  
Time 15 minutes

Add All Customers To Queue

Warning: Please save the configuration before syncing data

Cron Job  
Immediately

#### Products(Items in Xero)

Enable Yes  
Sync Mode Cron Job  
Time 15 minutes

Add All Products To Queue

Warning: Please save the configuration before syncing data

5 minutes  
10 minutes  
15 minutes  
30 minutes  
45 minutes  
1 hour  
2 hours

#### Orders

Enable Yes  
Sync Magento Order to Xero Invoice No  
Sync Mode Cron Job  
Time 15 minutes

Add All Orders To Queue

Warning: Please save the configuration before syncing data

#### Invoices

Enable Yes  
Sync Mode Cron Job  
Time 15 minutes

Add All Invoices To Queue

Warning: Please save the configuration before syncing data

#### Credit Memos

Enable Yes  
Sync Mode Cron Job  
Time 15 minutes

Add All Credit Memos To Queue

Warning: Please save the configuration before syncing data



#### How to distinguish between Immediately mode and Cron Job mode.

- **Immediately mode:** the data will be synced to Xero as soon as they're created or updated in Magento
- **Cron Job:** the data will be put into a queue and will be synced together after some intervals
- Some application mode like private mode only allows 1000 requests a day. Choosing Cron Job will guarantee all data will be synced. We recommend you use Cron Job mode to make sure that you don't run out of requests per day.

At the end of Configuration, admins can quickly navigate to the online documentation as well as support portal for Xero Integration extension:

**Configuration**

Store View: Default Config ? Save Config

**GENERAL** **Xero Account Informations**

**CATALOG**

**MAGENEST**

**Xero** **Version** 2.1.2

**CUSTOMERS**

**SALES**

**Support Links**

- Installation Guide [Go to Installation Guide](#)
- User Guide [Go to User Guide](#)
- Support Portal [Go to Support Portal](#)

Tutorial Menu

## Payment Mapping

You can map the order payment method with the Xero bank account in Xero Integration > Payment Mapping

1. Update Bank Accounts
2. Choose the Xero bank account field to map
3. Save Mapping

**Payment Mapping**

Store View: Default Config ? Save Mapping

(Paid Orders will be transferred to the Bank Account matches that Order's Payment Method. Only enabled Payments will display here.)

| Title                                 | Code                     | Xero Account                                   |
|---------------------------------------|--------------------------|------------------------------------------------|
| No Payment Information Required       | free                     | Default Bank Account (in Stores/Configuration) |
| vault                                 | vault                    | Default Bank Account (in Stores/Configuration) |
| PayPal Billing Agreement              | paypal_billing_agreement | Default Bank Account (in Stores/Configuration) |
| Payment by cards or by PayPal account | hosted_pro               | Default Bank Account (in Stores/Configuration) |
| Paybox                                | paybox                   | Default Bank Account (in Stores/Configuration) |
| Check / Money order                   | checkmo                  | Default Bank Account (in Stores/Configuration) |
| Stored Accounts (Braintree PayPal)    | braintree_paypal_vault   | Default Bank Account (in Stores/Configuration) |

## Tax Mapping

Go to **Xero Integration > Taxes Mapping**

1. Update Tax rates
2. Choose the tax field in Xero Tax

### 3. Save Mapping

The screenshot shows the 'Taxes Mapping' page in the Magento admin. The left sidebar contains navigation links: Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Xero, Integration, Stores, and System. The main content area has a 'Store View' dropdown set to 'Default Config'. Below this is a note: '(Tax method will be converted to the corresponding Xero tax. Only enabled Tax method will display here.)'. There are two buttons: 'Save Mapping' and 'Update Tax Rates'. A table lists tax mappings with columns: ID, Tax Identifier, Country, and Xero Tax. Three mappings are shown: 1. US-CA-\*Rate 1 (US) mapped to '[AVALARA] Auto Look Up'; 2. US-NY-\*Rate 1 (US) mapped to '[INPUT] Tax on Purchases'; 3. uk (GB) mapped to 'Default Tax in Sale Account (in Stores/Configuration)'. A dropdown menu is open for the third mapping, showing options: '[AVALARA] Auto Look Up', '[GSTONIMPORTS] Sales Tax on Imports', '[NONE] Tax Exempt', '[INPUT] Tax on Purchases', and '[OUTPUT] Tax on Sales'. The footer includes 'Copyright © 2018 Magento Commerce Inc. All rights reserved.' and 'Magento ver. 2.2.5 Account Activity | Report an Issue'.

| ID | Tax Identifier | Country | Xero Tax                                              |
|----|----------------|---------|-------------------------------------------------------|
| 1  | US-CA-*Rate 1  | US      | [AVALARA] Auto Look Up                                |
| 2  | US-NY-*Rate 1  | US      | [INPUT] Tax on Purchases                              |
| 3  | uk             | GB      | Default Tax in Sale Account (in Stores/Configuration) |

## Add Data to Queue/ Sync instantly to Xero

In **customer listing**, **product listing**, **order/invoice listing** and **credit memo listing**, you can add data to queue for later processing as mass action.

You can select the data you want to add to queue then choose **Actions > Add to queue**

You can also sync the selected data instantly to Xero by choosing **Actions > Sync to Xero**

The screenshot shows the 'Customers' listing page in the Magento admin. The left sidebar is the same as the previous screenshot. The main content area has a search bar and a table of customers. Above the table are buttons for 'Filters', 'Default View', 'Columns', and 'Export'. The table has columns: Email, Group, Phone, Country, State/Province, Customer Since, Web Site, Confirmed email, Account Created in, and Action. A dropdown menu is open for the 'Actions' column, showing options: 'Delete', 'Subscribe to Newsletter', 'Unsubscribe from Newsletter', 'Assign a Customer Group', 'Edit', 'Sync to Xero', and 'Add to Queue'. The table contains 19 records. The footer includes 'Copyright © 2018 Magento Commerce Inc. All rights reserved.' and 'Magento ver. 2.2.5 Account Activity | Report an Issue'.

| Email                            | Group   | Phone         | Country       | State/Province | Customer Since           | Web Site     | Confirmed email           | Account Created in | Action |
|----------------------------------|---------|---------------|---------------|----------------|--------------------------|--------------|---------------------------|--------------------|--------|
| Account_mageneat@gmail.com       | General |               |               |                | Apr 20, 2018 11:35:20 AM | Main Website | Confirmation Not Required | Default Store View | Edit   |
| first@last.com                   | General |               |               |                | Apr 5, 2018 10:42:45 AM  | Main Website | Confirmation Not Required | Default Store View | Edit   |
| hieunguyenct55@gmail.com         | General |               |               |                | Apr 5, 2018 4:11:17 AM   | Main Website | Confirmation Not Required | Default Store View | Edit   |
| hieunguyen95@gmail.com           | General | +841669546354 | Vietnam       |                | Apr 5, 2018 4:10:41 AM   | Main Website | Confirmation Not Required | Default Store View | Edit   |
| wkyne@gmail.com                  | General |               |               |                | Jan 10, 2018 5:51:52 AM  | Main Website | Confirmation Not Required | Default Store View | Edit   |
| lalene.depio@nichefashion.com.au | General | 123456789     | Philippines   | cebu           | Jan 10, 2018 4:41:23 AM  | Main Website | Confirmation Not Required | Default Store View | Edit   |
| jack davi                        | General |               |               |                | Dec 1, 2017 7:55:15 PM   | Main Website | Confirmation Not Required | Default Store View | Edit   |
| ytst tyrt                        | General |               |               |                | Oct 12, 2017 6:01:54 AM  | Main Website | Confirmation Not Required | Default Store View | Edit   |
| dominik.wiecek                   | General | 123456789     | United States | American Samoa | Sep 29, 2017 3:42:43 PM  | Main Website | Confirmation Not Required | Default Store View | Edit   |
| my huyen                         | General |               |               |                | Aug 24, 2017 4:20:12 AM  | Main Website | Confirmation Not Required | Default Store View | Edit   |
| Liam Tran                        | General |               |               |                | Aug 20, 2017 2:24:03 PM  | Main Website | Confirmation Not Required | Default Store View | Edit   |
| Cezary Testy-Exorigo             | General | 519080318     | Poland        |                | Aug 20, 2017 12:04:18 PM | Main Website | Confirmation Not Required | Default Store View | Edit   |

## Products

[Xero](#)

[Add Product](#)

|                          |    | Type                                                                                                    | Attribute Set  | SKU               | Price                 | Quantity  | Visibility      | Status          | Websites     | Action               | Xero Sales Account   | Xero COGS Account        | Xero Tracking Category   |
|--------------------------|----|---------------------------------------------------------------------------------------------------------|----------------|-------------------|-----------------------|-----------|-----------------|-----------------|--------------|----------------------|----------------------|--------------------------|--------------------------|
|                          |    | Simple Product                                                                                          | Default        | Test001           | £1,221.00             | 12.0000   | Catalog, Search | Enabled         | Main Website | <a href="#">Edit</a> | Sales[4000]          | Cost of Goods Sold[5000] |                          |
|                          |    | Simple Product                                                                                          | Default        | Samsung Galaxy S9 | £1,100.00             | 22.0000   | Catalog, Search | Enabled         | Main Website | <a href="#">Edit</a> | Service[4300]        | Subcontractor[5300]      |                          |
| <input type="checkbox"/> | 27 |  Test product 1        | Simple Product | Default           | Test product 1        | £1,000.00 | 9999.0000       | Catalog, Search | Enabled      | Main Website         | <a href="#">Edit</a> | Discount Received[4100]  | Purchase Discount[5100]  |
| <input type="checkbox"/> | 30 |  Infinity war          | Simple Product | Default           | Ticket 1              | £142.00   | 999.0000        | Catalog, Search | Enabled      | Main Website         | <a href="#">Edit</a> | Service[4300]            | Purchase Discount[5100]  |
| <input type="checkbox"/> | 31 |  Incredible            | Simple Product | Default           | Incredible            | £123.00   | 992.0000        | Catalog, Search | Enabled      | Main Website         | <a href="#">Edit</a> | Sales[4000]              | Cost of Goods Sold[5000] |
| <input type="checkbox"/> | 26 |  Scarlett Yellow Dress | Simple Product | Default           | Scarlett Yellow Dress | £27.00    | 19984.0000      | Catalog, Search | Enabled      | Main Website         | <a href="#">Edit</a> | Sales[4000]              | Cost of Goods Sold[5000] |
| <input type="checkbox"/> | 24 |  Lovely Blue jumpsuit  | Simple Product | Default           | Lovely Blue jumpsuit  | £21.00    | 19999.0000      | Catalog, Search | Enabled      | Main Website         | <a href="#">Edit</a> | Sales[4000]              | Cost of Goods Sold[5000] |
| <input type="checkbox"/> | 25 |  Black Culottes        | Simple Product | Default           | Black Culottes        | £21.00    | 19982.0000      | Catalog, Search | Enabled      | Main Website         | <a href="#">Edit</a> | Sales[4000]              | Cost of Goods Sold[5000] |

## Process Synchronization

If the App mode is Cron Job, data will be added to the Queue List to be sync after a specific interval. On the **Queue** List tab, admin can preven any data from being synced by removing them from the Queue list. Admin can also use click on **Sync Now** to syncall data on the queue list immediately.

Note that syncing time will vary, depending on the size of database.



DASHBOARD  
SALES  
PRODUCTS  
CUSTOMERS  
MARKETING  
CONTENT  
**XERO INTEGRATION**  
REPORTS  
STORES  
SYSTEM  
FIND PARTNERS & EXTENSIONS

Log

View Request Daily

Search by keyword

Filters

Default View

Columns

Export

25 records found

20 per page

1 of 2

Actions

Delete

| <input type="checkbox"/> | ID  | Message                                                                                                      | Dequeue Time        | Xero Record Id               | Type          | Magento Entity Id         | Status  |
|--------------------------|-----|--------------------------------------------------------------------------------------------------------------|---------------------|------------------------------|---------------|---------------------------|---------|
| <input type="checkbox"/> | 494 | ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: Item code 'Xero Integration 1' is not valid    | 2017-06-03 08:39:17 |                              | PurchaseOrder | 000000016                 | ERROR   |
| <input type="checkbox"/> | 495 | ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: PurchaseOrder not of valid status for creation | 2017-06-03 08:39:17 |                              | PurchaseOrder | 000000017                 | ERROR   |
| <input type="checkbox"/> | 381 | OK                                                                                                           | 2017-06-01 03:17:24 | <a href="#">View on Xero</a> | Item          | tax                       | SUCCESS |
| <input type="checkbox"/> | 382 | OK                                                                                                           | 2017-06-01 03:17:24 | <a href="#">View on Xero</a> | Item          | shipping                  | SUCCESS |
| <input type="checkbox"/> | 383 | OK                                                                                                           | 2017-06-01 03:17:24 | <a href="#">View on Xero</a> | Contact       | magenest_xero             | SUCCESS |
| <input type="checkbox"/> | 384 | OK                                                                                                           | 2017-06-03 04:15:36 | <a href="#">View on Xero</a> | Item          | tax                       | SUCCESS |
| <input type="checkbox"/> | 385 | OK                                                                                                           | 2017-06-03 04:15:36 | <a href="#">View on Xero</a> | Item          | shipping                  | SUCCESS |
| <input type="checkbox"/> | 386 | OK                                                                                                           | 2017-06-03 04:15:37 | <a href="#">View on Xero</a> | Contact       | magenest_xero             | SUCCESS |
| <input type="checkbox"/> | 391 | OK                                                                                                           | 2017-06-03 04:28:08 | <a href="#">View on Xero</a> | Contact       | 6                         | SUCCESS |
| <input type="checkbox"/> | 392 | OK                                                                                                           | 2017-06-03 06:20:33 | <a href="#">View on Xero</a> | Contact       | 13                        | SUCCESS |
| <input type="checkbox"/> | 409 | OK                                                                                                           | 2017-06-03 06:50:07 | <a href="#">View on Xero</a> | Item          | Harmony Lumaflex Band Kit | SUCCESS |
| <input type="checkbox"/> | 411 | OK                                                                                                           | 2017-06-03 06:56:32 | <a href="#">View on Xero</a> | Contact       | d7b3d                     | SUCCESS |
| <input type="checkbox"/> | 412 | OK                                                                                                           | 2017-06-03 06:56:33 | <a href="#">View on Xero</a> | Contact       | 4a22e                     | SUCCESS |
| <input type="checkbox"/> | 413 | OK                                                                                                           | 2017-06-03 06:56:33 | <a href="#">View on Xero</a> | Contact       | 9bd63                     | SUCCESS |
| <input type="checkbox"/> | 414 | OK                                                                                                           | 2017-06-03 06:56:34 | <a href="#">View on Xero</a> | Contact       | ff965                     | SUCCESS |
| <input type="checkbox"/> | 457 | OK                                                                                                           | 2017-06-03 07:10:29 | <a href="#">View on Xero</a> | Invoice       | 000000008                 | SUCCESS |
| <input type="checkbox"/> | 467 | OK                                                                                                           | 2017-06-03 08:35:57 | <a href="#">View on Xero</a> | Contact       | 7                         | SUCCESS |
| <input type="checkbox"/> | 468 | OK                                                                                                           | 2017-06-03 08:35:57 | <a href="#">View on Xero</a> | Contact       | 8                         | SUCCESS |
| <input type="checkbox"/> | 469 | OK                                                                                                           | 2017-06-03 08:35:57 | <a href="#">View on Xero</a> | Contact       | 9                         | SUCCESS |
| <input type="checkbox"/> | 470 | OK                                                                                                           | 2017-06-03 08:35:57 | <a href="#">View on Xero</a> | Contact       | 10                        | SUCCESS |

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Navigate to **Xero Integration > Request Daily Report**, admins can easily see their synchronization status.

# Request Report

Requests Made Today

**Total Request Today**

8

**Detail**

|                     |                                 |
|---------------------|---------------------------------|
| Contact Request:    | 2                               |
| Item Request:       | 3                               |
| Order Request:      | 2                               |
| Invoice Request:    | 1                               |
| CreditNote Request: | No request has been made to day |

**Request Records**

**Detail**

|                  | Date       | Number of Requests |
|------------------|------------|--------------------|
| Highest Request: | 2017-06-03 | 42                 |
| Lowest Request:  | 2017-05-20 | 1                  |

**Request Report**

Get Date From  To

**Requests**

| Date       | Number of Requests |
|------------|--------------------|
| 2017-06-01 | 7                  |
| 2017-06-03 | 42                 |
| 2017-06-05 | 8                  |

**Detail**

| Type            | Total Request | Request Failed |
|-----------------|---------------|----------------|
| BankTransaction | 1             | 1              |
| Contact         | 17            | 0              |
| Invoice         | 2             | 0              |
| Item            | 10            | 1              |
| PurchaseOrder   | 4             | 4              |

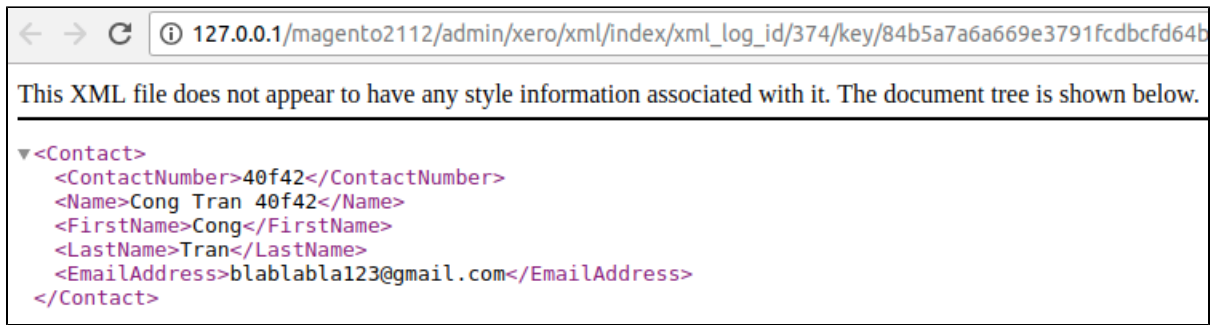
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You can also view the xml data that is synced to Xero. This helps you debug easily in case there is a bug.

| ID  | Magento Entity Id | Type             | Message | Dequeue Time        | Website        | Xero Record Id               | XML Log                      | Status  |
|-----|-------------------|------------------|---------|---------------------|----------------|------------------------------|------------------------------|---------|
| 583 | 308022            | BankTransaction  | OK      | 2018-08-07 09:10:10 | Second Website | <a href="#">View on Xero</a> | <a href="#">View XML Log</a> | SUCCESS |
| 582 | test product      | Item             | OK      | 2018-08-07 09:10:09 | Second Website | <a href="#">View on Xero</a> | <a href="#">View XML Log</a> | SUCCESS |
| 578 | 000000011         | InvoiceToInvoice | OK      | 2018-08-07 08:59:41 | Main Website   | <a href="#">View on Xero</a> | <a href="#">View XML Log</a> | SUCCESS |
| 577 | 4                 | Contact          | OK      | 2018-08-07 08:55:04 | Second Website | <a href="#">View on Xero</a> | <a href="#">View XML Log</a> | SUCCESS |
| 569 | C000000003        | CreditNote       | OK      | 2018-08-07 08:28:03 | Second Website | <a href="#">View on Xero</a> | <a href="#">View XML Log</a> | SUCCESS |



---

## Main Functions

Video Demonstration



When a new account is registered on the frontend of Magento 2, Xero Integration extension will automatically add a new record on Xero site.

This is demo store. No orders will be fulfilled.

GET STARTED FOR FREE

Magenest

SALE TRAINING WOMEN

Q

DEFAULT STORE VIEW

Create New Customer Account

Personal Information

First Name \*

Thomas

Last Name \*

Stevens

☐ Sign Up for Newsletter

Sign-in Information

Email \*

thomasstevensbk1212@gmail.com

Password \*

\*\*\*\*\*

Password Strength: Medium

Confirm Password \*

\*\*\*\*\*

Create an Account

NEWSLETTER

Sign Up for Our Newsletter:

Enter your email address

SUBSCRIBE

ABOUT

Privacy Policy

Terms and Conditions

Magento Marketplace

Magento Customization

HELP

FAQ

ORDER TRACKING

SHIPPING AND HANDLING

PAYMENT METHODS

RET

INFOMATION

ABOUT US

DELIVERY INFORMATION

PRIVACY POLICY

TERMS CONDITIONS

SEVICES

CUSTOMER SERVICE

CONTACT US

support@magenest.com

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- DASHBOARD
- SALES
- PRODUCTS
- CUSTOMERS**
- MARKETING
- CONTENT
- INTEGRATION
- REPORTS
- STORES
- SYSTEM
- FIND PARTNERS & EXTENSIONS

## Customers

5 records found
20 per page
1 of 1

|                          | ID | Name                  | Email                         | Group   | Customer Since          | Web Site     | Confirmed email           | Account Created in | Action               |
|--------------------------|----|-----------------------|-------------------------------|---------|-------------------------|--------------|---------------------------|--------------------|----------------------|
| <input type="checkbox"/> | 1  | Danny Prichett Miller | dannymiller@gmail.com         | General | Jul 13, 2016 8:08:37 AM | Main Website | Confirmation Not Required | Default Store View | <a href="#">Edit</a> |
| <input type="checkbox"/> | 8  | Jack Perez            | ict10@gmail.com               | General | Apr 22, 2017 8:51:25 AM | Main Website | Confirmation Not Required | Default Store View | <a href="#">Edit</a> |
| <input type="checkbox"/> | 10 | Jack Perez            | jackp@gmail.com               | General | Apr 23, 2017 3:35:47 PM | Main Website | Confirmation Not Required | Default Store View | <a href="#">Edit</a> |
| <input type="checkbox"/> | 11 | Jame Lorenz           | jl@gmail.com                  | General | Apr 23, 2017 3:38:36 PM | Main Website | Confirmation Not Required | Default Store View | <a href="#">Edit</a> |
| <input type="checkbox"/> | 13 | Thomas Stevens        | thomasstevensbk1212@gmail.com | General | Jun 3, 2017 6:19:08 AM  | Main Website | Confirmation Not Required | Default Store View | <a href="#">Edit</a> |

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Or you can click on **Sync Now** button within each customer info dashboard to synchronize a specific customer data manually.

- DASHBOARD
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## Thomas Stevens

✓ Sync process complete, please check out Logs for results

**CUSTOMER INFORMATION**

- Customer View
- Account Information
- Addresses
- Orders
- Billing Agreements
- Newsletter
- Product Reviews
- Wish List
- Xero Integration**

### Information

Xero ID: **785dd063-0dd6-4459-bff8-1bcacb5e2ecd**

Last Updated At: Jun 2, 2017, 8:19:04 AM

Created At: Jun 2, 2017, 8:19:04 AM

### Sync History

|    |                     |    |
|----|---------------------|----|
| 1. | 2017-06-02 08:19:04 | Ok |
|----|---------------------|----|

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**Contacts**

All 7

Customers 1

Suppliers 0

Employees 0

Archived 0

Groups [New](#)

No groups

Smart Lists [New](#)

Have purchased an item

Outstanding > 30 days

Options Edit No items selected Search Sort by Name

| CONTACT                                                     | EMAIL                     | YOU OWE THEM | THEY OWE YOU |
|-------------------------------------------------------------|---------------------------|--------------|--------------|
| <input type="checkbox"/> Chuck Taylor                       | chucktaylor@converse.c... | —            | —            |
| <input type="checkbox"/> Danny Miller<br>Hanoi, 01234567890 | dannymiller@gmail.com     | —            | —            |
| <input type="checkbox"/> Jack Perez<br>NYC, 5334533         | jackp@gmail.com           | —            | —            |
| <input type="checkbox"/> Jame Lorenz                        | jl@gmail.com              | —            | —            |
| <input type="checkbox"/> Thomas Stevens                     | thomasstevensbk1212@...   | —            | 26.00        |

Import Export Send statements Add contact

- Whenever admins create a new order, invoice, and product or edit them on Magento 2 store successfully, The data will be synced to Xero automatically.

- Orders

**Orders**

Create New Order

Search by keyword

Filters Default View Columns Export

Actions 18 records found 20 per page 1 of 1

| ID       | Purchase Point                                           | Purchase Date             | Bill-to Name   | Ship-to Name   | Grand Total (Base) | Grand Total (Purchased) | Status     | Action               |
|----------|----------------------------------------------------------|---------------------------|----------------|----------------|--------------------|-------------------------|------------|----------------------|
| 00000018 | Main Website<br>Main Website Store<br>Default Store View | Jun 05, 2017, 4:06:00 AM  | Thomas Stevens | Thomas Stevens | \$26.00            | \$26.00                 | Closed     | <a href="#">View</a> |
| 00000017 | Main Website<br>Main Website Store<br>Default Store View | Jun 03, 2017, 6:06:00 AM  | Thomas Stevens | Thomas Stevens | \$13.00            | \$13.00                 | Closed     | <a href="#">View</a> |
| 00000016 | Main Website<br>Main Website Store<br>Default Store View | Apr 23, 2017, 15:04:00 PM | Jame Lorenz    | Jame Lorenz    | \$17.00            | \$17.00                 | Processing | <a href="#">View</a> |

Tutorial Menu

Admins can synchronize a specific order by manually by clicking on **Sync Now** button on each order.

#000000018

← Back   Send Email

**ORDER VIEW**

- Information
- Invoices
- Credit Memos
- Shipments
- Comments History
- Xero Integration**

**Information**

Xero ID: 54caa51e-b30b-4898-8f15-a386dbddab64

Last Updated At: Jun 5, 2017, 8:50:17 AM

Created At: Jun 5, 2017, 4:26:42 AM

[Sync Now](#)

**Sync History**

|    |                     |    |
|----|---------------------|----|
| 1. | 2017-06-05 08:50:17 | Ok |
| 2. | 2017-06-05 06:08:55 | Ok |
| 3. | 2017-06-05 06:08:18 | Ok |
| 4. | 2017-06-05 04:26:42 | Ok |

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Magenest      William Moseley

Dashboard   Accounts   Payroll   Reports   Contacts   Settings

Purchases > **Purchase**

+ New Purchase

All   Draft   **Purchases**   Billed (0)

3 items   [Search](#)

| Number    | Supplier       | Date raised | Delivery date | Amount | Status            | Sent |
|-----------|----------------|-------------|---------------|--------|-------------------|------|
| 000000018 | Thomas Stevens | Jun 5, 2017 |               | 26.00  | Deleted           |      |
| 000000016 | Jame Lorenz    | Jun 5, 2017 |               | 17.00  | Approved          |      |
| 000000011 | Jams Mas       | Jun 5, 2017 |               | 17.00  | Awaiting Approval |      |

- Products

**\* Note: The products name must be less than or equal to 50 characters otherwise it would be cut off to fit in since Xero only allows maximum 50 characters in product name.**

**In addition, the products SKU must be less than or equal to 30 characters otherwise it can't be synced to Xero since Xero only allows maximum 30 characters in product SKU.**

SALES

PRODUCTS

CUSTOMERS

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XBIO

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REPORTS

STORES

SYSTEM

# Catalog

10
 xero ▾

Add Product ▾

Filters

Default View ▾

Columns ▾

Actions ▾      5 records found

20 ▾ per page    <    1    of 1    >

|                          | ID | Thumbnail | Name                     | Type           | Attribute Set | SKU                      | Price   | Quantity   | Visibility      | Status  | Websites     | Action               |
|--------------------------|----|-----------|--------------------------|----------------|---------------|--------------------------|---------|------------|-----------------|---------|--------------|----------------------|
| <input type="checkbox"/> | 21 |           | Lilac Flower Dress       | Simple Product | Default       | Lilac Flower Dress       | \$12.00 | 20000.0000 | Catalog, Search | Enabled | Main Website | <a href="#">Edit</a> |
| <input type="checkbox"/> | 22 |           | Flora Maxi Dress         | Simple Product | Default       | Flora Maxi Dress         | \$21.00 | 20000.0000 | Catalog, Search | Enabled | Main Website | <a href="#">Edit</a> |
| <input type="checkbox"/> | 23 |           | White Printed Maxi Dress | Simple Product | Default       | White Printed Maxi Dress | \$12.00 | 20000.0000 | Catalog, Search | Enabled | Main Website | <a href="#">Edit</a> |

Tutorial Menu

For each product, this extension created Xero Integration tab that allows admins to synchronize a specific product to Xero.

DASHBOARD

SALES

PRODUCTS

CUSTOMERS

MARKETING

CONTENT

INTEGRATION

REPORTS

STORES

SYSTEM

RND PARTNERS & EXTENSIONS

# Harmony Lumaflex Band Kit

Store View: All Store Views

Back

Add Attribute

Save

Sync process complete, please check out Logs for results

Enable Product

Yes

Attribute Set

Default

Product Name

Harmony Lumaflex Band Kit

SKU

Harmony Lumaflex Band Kit

Dynamic SKU

Yes

Price

\$ 35.00

Advanced Pricing

Dynamic Price

No

Tax Class

Taxable Goods

Quantity

0

Advanced Inventory

Stock Status

In Stock

Weight

lbs

Dynamic Weight

Yes

Visibility

Catalog, Search

Categories

Training

New Category

Set Product as New From

To

Country of Manufacture

Content

Bundle Items

Product Reviews

Images And Videos

Search Engine Optimization

Related Products, Up-Sells, and Cross-Sells

Customizable Options

Product in Websites

Design

Schedule Design Update

Gift Options





DASHBOARD



PRODUCTS



CUSTOMERS



MARKETING



CONTENT



INTEGRATION



REPORTS



STORES

#000000001

[← Back](#) [Send Email](#) [Print](#)

## Order &amp; Account Information

Order # 000000001 (The order confirmation email was sent)

## Account Information

|                |                                                          |                |                       |
|----------------|----------------------------------------------------------|----------------|-----------------------|
| Order Date     | Jul 13, 2016, 8:10:35 AM                                 | Customer Name  | Danny Miller          |
| Order Status   | Closed                                                   | Email          | dannymiller@gmail.com |
| Purchased From | Main Website<br>Main Website Store<br>Default Store View | Customer Group | General               |

## Address Information

Billing Address [Edit](#)

Danny Miller  
Tay Son - Dong Da District  
Hanoi, 12345-6789  
Vietnam  
T: 01234567890

Shipping Address [Edit](#)

Danny Miller  
Tay Son - Dong Da District  
Hanoi, 12345-6789  
Vietnam  
T: 01234567890

## Xero Integration

## Information

Xero ID: 576ff78e-d15f-40fe-9c23-7aca383a14a9  
Last Updated At: Nov 14, 2016, 4:10:37 AM  
Created At: Nov 12, 2016, 3:32:46 AM

[Sync Now](#)

## Sync History

|                     |    |
|---------------------|----|
| 2016-11-14 04:10:37 | Ok |
| 2016-11-12 03:32:46 | Ok |

## Payment &amp; Shipping Method

## Payment Information

Check / Money order  
The order was placed using USD.

## Shipping Information

**Flat Rate - Fixed**  
Total Shipping Charges: **\$5.00**

## Items Invoiced

| Product                                                         | Price   | Qty | Subtotal | Tax Amount | Discount Amount | Row Total |
|-----------------------------------------------------------------|---------|-----|----------|------------|-----------------|-----------|
| Yoga Adventure<br>SKU: Yoga Adventure 1<br>Links Trailer #1 (2) | \$75.00 | 1   | \$75.00  | \$0.00     | \$0.00          | \$75.00   |
| Nadia Elements Shell<br>SKU: Nadia Elements Shell-KK47          | \$8.00  | 1   | \$8.00   | \$0.00     | \$0.00          | \$8.00    |

## Order Total

## Invoice History

Comment Text

☐ Notify Customer by Email☐ Visible on Storefront[Submit Comment](#)

## Invoice Totals

|                     |                |
|---------------------|----------------|
| Subtotal            | \$83.00        |
| Shipping & Handling | \$5.00         |
| <b>Grand Total</b>  | <b>\$88.00</b> |



The screenshot displays the Magenest software interface. At the top, a blue navigation bar contains the Magenest logo and several menu items: Dashboard, Accounts, Payroll, Reports, Contacts, and Settings. To the right of these are icons for adding new items, a folder, email, search, and help. Below the navigation bar, a sub-menu for 'Sales' is open, showing options like Bank Accounts, Sales, Purchases, Checks, Inventory, Expense Claims, and Fixed Assets. A red arrow points to the 'Invoices' option in this sub-menu. Another red arrow points to the 'Credit Memos' option in the same sub-menu. Below the sub-menu, there are buttons for 'New Invoice', 'Send Statements', 'Import', 'Export', and a toggle for 'Invoice reminders off'. A status bar indicates 'Awaiting Payment (1)', 'Paid', and 'Repeating'. At the bottom, a table lists invoices with columns for Number, Ref, Date, Due Date, Paid, Due, Status, and Sent. The table contains five rows of data, with the last row highlighted in blue. A red arrow points to the 'Invoices' label in the bottom right corner of the interface.

**Magenest**

Dashboard Accounts Payroll Reports Contacts Settings

+ Folder Email Search ?

Sales >

**Invoices**

New Invoice

Send Statements Import Export Invoice reminders off

All Draft

Awaiting Payment (1) Paid Repeating

Credit Memos

5 Items Search

| Number    | Ref          | Date         | Due Date     | Paid | Due   | Status           | Sent |
|-----------|--------------|--------------|--------------|------|-------|------------------|------|
| 2         |              | Nov 15, 2016 |              | 0.00 | 0.00  | Paid             |      |
| 1         | Chuck Taylor | Nov 15, 2016 |              | 0.00 | 0.00  | Paid             |      |
| 000000003 | Chuck Taylor | Jul 13, 2016 | Jul 13, 2016 | 0.00 | 0.00  | Paid             |      |
| 000000002 | Danny Miller | Jul 13, 2016 | Jul 13, 2016 | 0.00 | 97.00 | Awaiting Payment |      |
| 000000001 | Danny Miller | Jul 13, 2016 | Jul 13, 2016 | 0.00 | 0.00  | Paid             |      |

Invoices

- ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: Item code 'shipping' is not valid

=> Please disconnect and re-connect your Xero account in Xero Integration -> Configuration.

=> Please sync related items first, then re-sync the order/invoice or turn on setting "Sync Needed Data"

- ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: An existing contact could not be found using the specified contact details. The contact name field is required to create a new contact.

|                          |      |            |                |                                                                                                                                                                                                       |                     |              |                 |                              |
|--------------------------|------|------------|----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|--------------|-----------------|------------------------------|
| <input type="checkbox"/> | 3880 | 3000000003 | OrderToInvoice | ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: An existing contact could not be found using the specified contact details. The contact name field is required to create a new contact. | 2018-11-08 04:11:51 | <b>ERROR</b> | Default Website | <a href="#">View XML Log</a> |
|--------------------------|------|------------|----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|--------------|-----------------|------------------------------|

=> Please sync related customer first, then re-sync the order/invoice or turn on setting "Sync Needed Data"

- ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: Organisation is not subscribed to currency

|                          |      |           |                  |                                                                                                          |                     |              |                 |                              |
|--------------------------|------|-----------|------------------|----------------------------------------------------------------------------------------------------------|---------------------|--------------|-----------------|------------------------------|
| <input type="checkbox"/> | 3854 | 000000006 | InvoiceToInvoice | ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: Organisation is not subscribed to currency | 2018-10-25 07:51:23 | <b>ERROR</b> | Default Website | <a href="#">View XML Log</a> |
|--------------------------|------|-----------|------------------|----------------------------------------------------------------------------------------------------------|---------------------|--------------|-----------------|------------------------------|

=> Please check your Xero currency and your order currency, make sure that your Xero account support the order currency

- ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: The specified bank account details does not match a known bank account.

|                          |      |        |                 |                                                                                                                                       |                     |              |                 |                              |
|--------------------------|------|--------|-----------------|---------------------------------------------------------------------------------------------------------------------------------------|---------------------|--------------|-----------------|------------------------------|
| <input type="checkbox"/> | 3894 | 000000 | BankTransaction | ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: The specified bank account details does not match a known bank account. | 2018-11-08 04:27:39 | <b>ERROR</b> | Default Website | <a href="#">View XML Log</a> |
|--------------------------|------|--------|-----------------|---------------------------------------------------------------------------------------------------------------------------------------|---------------------|--------------|-----------------|------------------------------|

=> Please check your Xero bank account and make sure it is correctly configured in Xero integration configuration.

- ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: Invoice could not be found

|                          |      |           |         |                                                                                          |                     |              |                 |                              |
|--------------------------|------|-----------|---------|------------------------------------------------------------------------------------------|---------------------|--------------|-----------------|------------------------------|
| <input type="checkbox"/> | 3882 | 000000038 | Payment | ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: Invoice could not be found | 2018-11-08 04:18:38 | <b>ERROR</b> | Default Website | <a href="#">View XML Log</a> |
|--------------------------|------|-----------|---------|------------------------------------------------------------------------------------------|---------------------|--------------|-----------------|------------------------------|

=> Please check invoice error with above errors and then re-sync the order/invoice first

- ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: Invoice not of valid status for modification, This document cannot be edited as it has a payment or credit note allocated to it.

|                          |      |           |                  |                                                                                                                                                                                                 |                     |              |                 |                              |
|--------------------------|------|-----------|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|--------------|-----------------|------------------------------|
| <input type="checkbox"/> | 3856 | 000000013 | InvoiceToInvoice | ERROR MESSAGE: A validation exception occurred; ERROR DETAIL: Invoice not of valid status for modification, This document cannot be edited as it has a payment or credit note allocated to it., | 2018-10-25 07:51:23 | <b>ERROR</b> | Default Website | <a href="#">View XML Log</a> |
|--------------------------|------|-----------|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|--------------|-----------------|------------------------------|

=> This invoice in Xero is already in the status that does not allow to modify anymore.

## Update

- When a new update is available, we will provide you with a new package containing our updated extension.
- You will have to delete the module directory and repeat the installing steps above.
- Flush the config cache. Your store and newly installed module should be working as expected.

## Support

- We will reply to support requests within **2 business days**.
- We will offer **lifetime free update and 6 months free support for all of our paid products**. Support includes answering questions related to our products, bug/error fixing to make sure our products fit well in your site exactly like our demo.
- Support **DOES NOT** include other series such as customizing our products, installation and uninstallation service.

Once again, thank you for purchasing our extension. If you have any questions, please do not hesitate to contact us for support.