



User Guide
Xero Integration

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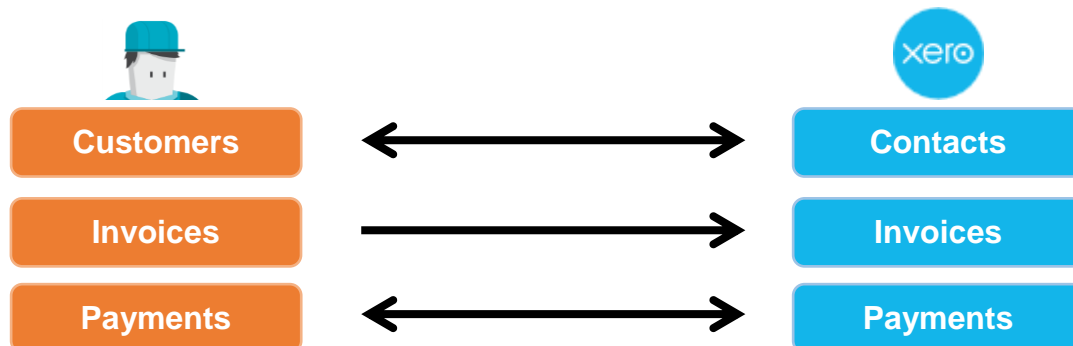
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1 Introduction

Welcome to the Tradietech Xero Integration guide. Connecting Tradietech with your Xero account will allow your contacts, invoices and payments to automatically synchronise.

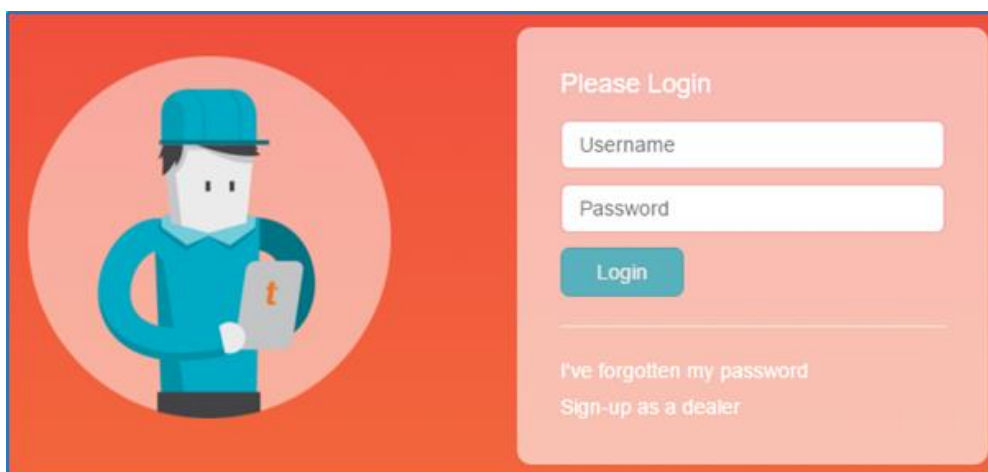


2 How to setup Xero Integration

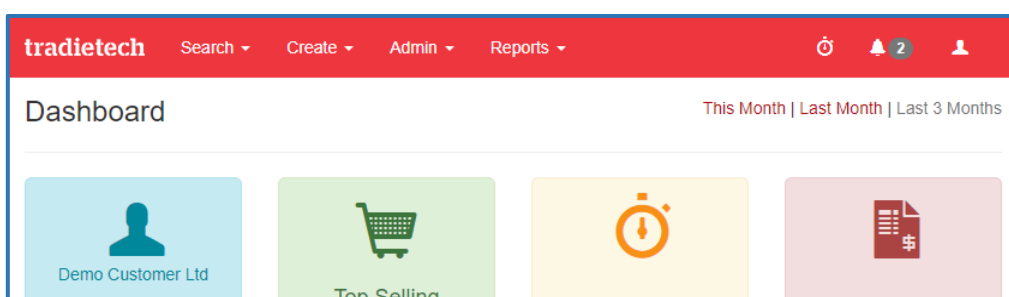
This setup guide will help you sign into Tradietech with your dealer account and connect to it your Xero organisation.

2.1 Sign In

Open the Tradietech website in your web browser to sign in, then enter your username and password and click the **Login** button.



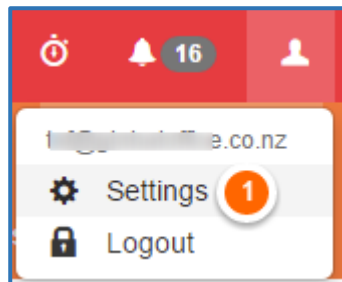
Once signed in the website will load your dashboard.



2.2 Setup the Xero Accounting Package

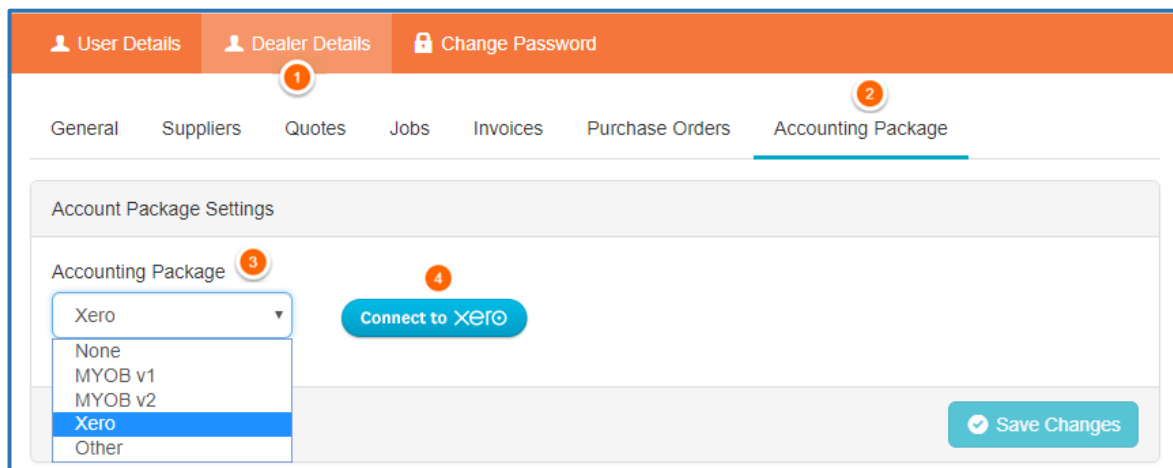
From the navigation bar at the top of the screen, click on the profile icon to show the profile menu and then click on **Settings** link in the menu.

1. Click the profile icon and then **Settings** to open up the user and Dealer settings.



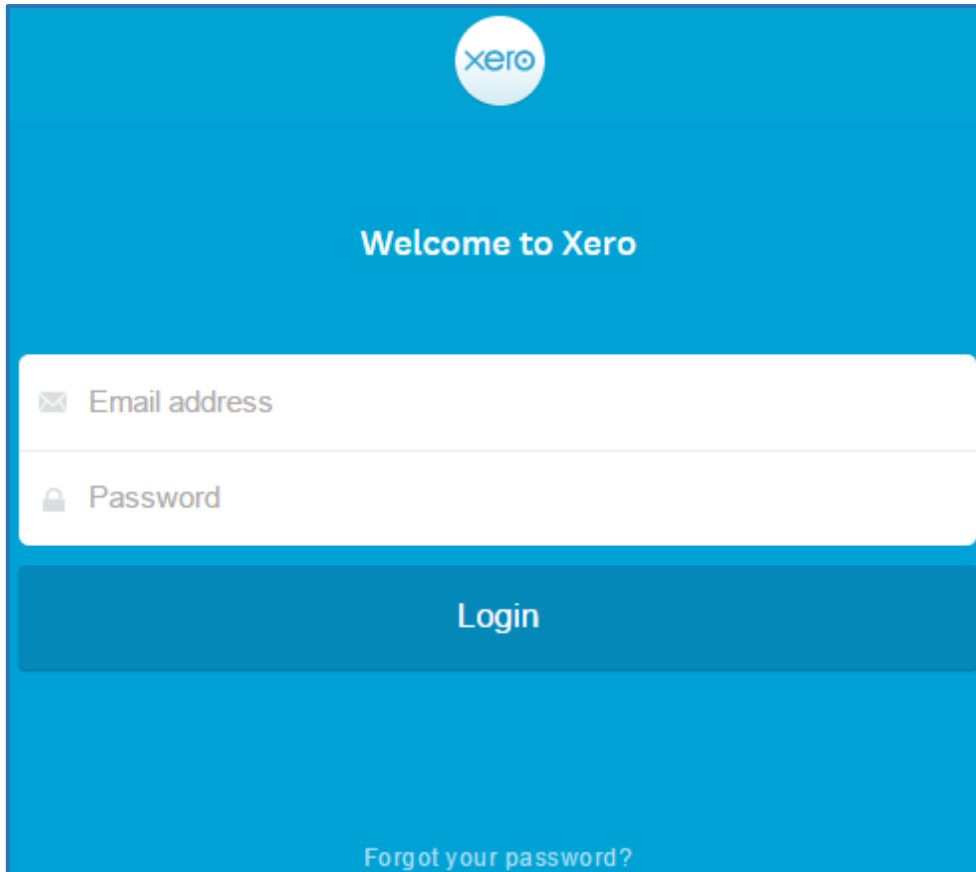
From the Settings page click on the tab heading **Dealer Details**. The Dealer Details pages stores the global settings that affect all users for your Dealer account.

1. Click to enter the **Dealer Details** window.
2. Click to enter the Accounting Package window.
3. Select the **Xero** accounting package from the dropdown list. Selecting this option will show the Connect to Xero button.
4. Click on the Connect to Xero button



2.3 Authorise Tradietech for Xero

When you click the “Connect to Xero” button on the Tradietech Dealer account package page, you will be redirected to the Xero login page. Enter your Xero account email address and password. Click the Login button as shown below.

The image shows the Xero login page. At the top center is the Xero logo. Below it, the text "Welcome to Xero" is displayed. There are two input fields: "Email address" with an envelope icon and "Password" with a lock icon. Below these fields is a large blue "Login" button. At the bottom of the page, there is a link that says "Forgot your password?".

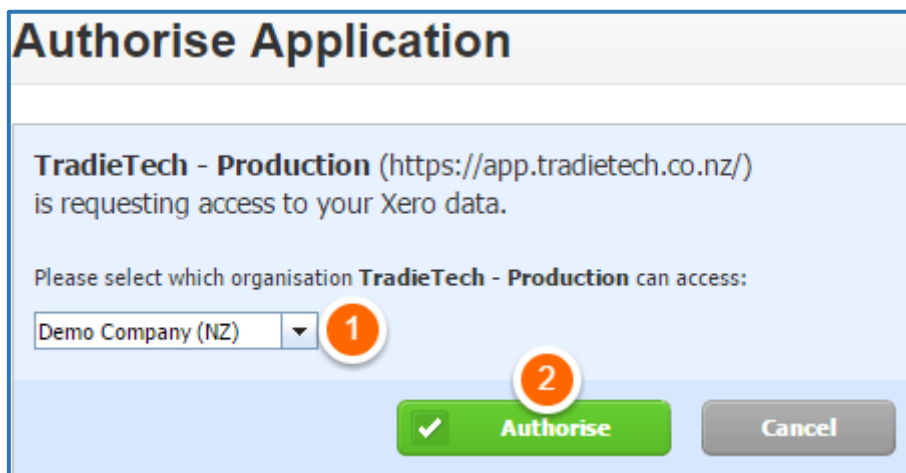
✉ Email address

🔒 Password

Login

[Forgot your password?](#)

Once logged in you will be prompted to authorize the tradietech application.

The image shows an "Authorise Application" dialog box. The title bar says "Authorise Application". The main content area contains the text: "TradieTech - Production (https://app.tradietech.co.nz/) is requesting access to your Xero data." Below this, it says "Please select which organisation TradieTech - Production can access:". There is a dropdown menu with "Demo Company (NZ)" selected. A red circle with the number "1" is next to the dropdown. At the bottom, there are two buttons: a green "Authorise" button with a checkmark and a red circle with the number "2" above it, and a grey "Cancel" button.

Authorise Application

TradieTech - Production (https://app.tradietech.co.nz/) is requesting access to your Xero data.

Please select which organisation **TradieTech - Production** can access:

Demo Company (NZ) 1

2

1. Select the company that Tradietech can access, e.g. Demo Company (NZ).
2. Click this button to authorise Tradietech. You will be presented with this message:

Authorise Application

TradieTech - Production is now enabled

You will be redirected back to <https://app.tradietech.co.nz/> in a second.

You will then be presented with your Xero account settings in Tradietech.

1. This displays your chosen accounting package, Xero.
2. Set the Xero account for payments. Only expense accounts will be available.
3. Set the Xero account for sales. Only income accounts will be available.
4. Click to save changes.

The screenshot shows the 'Accounting Package' settings page. At the top, there are navigation tabs: General, Suppliers, Quotes, Jobs, Invoices, Purchase Orders, and Accounting Package. The 'Accounting Package' section includes a dropdown menu for 'Accounting Package' set to 'Xero' (1), a red 'Disconnect from XERO' button (5), and a message: 'The Xero Organisation you are currently connected to is: Demo Company (NZ)'. Below this are two dropdown menus: 'Xero Account For Payments' (2) set to '090 - Business Bank Account' and 'Xero Account For Sales' (3) set to '200 - Sales'. At the bottom right, there is a 'Save Changes' button (4).

3 Frequently Asked Questions

How do I disconnect from Xero?

Open the **Accounting Package** screen from the **Settings** then **Dealer Details** page. Then click the red **Disconnect from Xero** button.

What doesn't your integration do?

Tradietech only synchronises details for the customers you load into it. So, anything in Xero that isn't an invoice, payment or change of contact details for your customer will not be accessed or synchronised.

When and how does data sync occur?

Changes will automatically sync to Xero within 5 minutes after either adding or editing a contacts, invoice or payment.