# Enabling OnePractice Sync with Xero Practice Manager

HubOne has changed the way we integrate with Practice Management Solutions. This makes you more secure and offers enhanced functionality.

In order to enable this for your practice, please follow the steps below:

- 1. Enable API Access in Xero Practice Manager
- 2. Integrate HubOne Sync

#### Enable API Access in Xero Practice Manager

1. Login to Xero Practice Manager by navigating to <u>https://practicemanager.xero.com</u> – Some companies call this Green Xero.

Monistia	
Stay safe online	with Xero login and two-step-authentication
	Find out more
	Log in
Email address	
	Continue

Enter Email Address and Click Continue

2. Xero will then prompt for a login.

Log in to Xero	
You're using the new Xero login experience	Learn more
Supporting our customers during Covid-19	Learn more
Email address	
Password	
Log in	
Forgot password? Can't log in	?

Enter email address and password and click log in

3. The user may be asked to authenticate with MFA. If so, get them to enter the close and click **log in** 

хего
Complete logging in with the authenticator app
Enter the 6-digit code provided by the authenticator app.
Authentication code
Log in
Remember me for 30 days
Use another authentication method
Get help with two-step authentication

4. On the menu bar, click **Business** 

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My Jobs			Suppliers						
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## 6. Click Staff

E HubOne XYZ and Associates	
Dashboard Clients Jobs Business Reports	© 💅 () 🛛 🤉
General Settings	
Practice	
Practice Settings	Client Settings
Edit your practice details.	Edit your client settings such as business structures, types and agents.
Job Settings	Lead Settings
Edit your job settings such as categories, states and templates	Edit your lead settings such as categories and templates.
Tasks	Staff
Edit your task settings for jobs and billing	Manage staff access, billable rates and learns.
Costs	Capacity
Manage costs that you frequently use on jobs, quotes and invoices.	Setup staff members available and target capacity.
E-Sign Settings	ATO Online Services
Manage E-Sign settings and template cover letters	Manage your ATO online services

## 7. Select the staff member you wish to modify

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Dashboard Clients	Jobs	Business	Reports				2			
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Invite Advisor										
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You have no job tasks scheduled this week.	Sea	rch:								Search
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	Jo	se Rodas					jo	se@tech	oath.com	au

## 8. Scroll down to the bottom of the page

Privilege		Full 🗆	View	New	Edit	Delete	Print
Authorize 3rd Darty E	ull Access	<b>2</b>					
Interface Infor	mation						
Interface Infor	mation						

Ensure Authorise 3<sup>rd</sup> Party Full Access is checked and click Save.

## Integrate HubOne Practice Sync

1. Navigate to <u>https://practicesync.azurewebsites.net/</u> OnePractice Sync Welcome to OnePractice Clients Sync

Use this website to configure the integration between your Practice Management Suite and Office 365. To begin, please login...
Login with Microsoft

- 2. Click Login with Microsoft and login using your Office 365 username and password
- 3. Next, select the documentcenter you wish to configure and click **configure**

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elect Sharepoint Document Center	٩	Search
hubone.sharepoint.com - (https://hubone.sharepoint.com)	Not set	Configure
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cchtesting - (https://hubone.sharepoint.com/cchtesting)	Not set	Configure
kairos - (https://hubone.sharepoint.com/sites/kairos)	Not set	Configure
documentcenter1237 - (https://hubone.sharepoint.com/documentcenter1237)	Not set	Configure
documentcenter6 - (https://hubone.sharepoint.com/documentcenter6)	Not set	Configure
mfa - (https://hubone.sharepoint.com/mfa)		Confourn

4. Click Connect XPM

OnePractice Sync			
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Synch Run Schedule	Create Client Folders	Rename Duplicate Clients	Email Synch Report
Every 3 hours 👻		Will append client code to name	۲
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https://yoursite.acclipse.	con		
Enable Webhooks			
Include inactive clients			
Connect			

5. Login to Xero with the account edited above

xero	
Log in to Xero	
You're using the new Xero login experience	Learn more
Supporting our customers during Covid-19	Learn more
nick@hubone.com	
Login	

Forgot password? Can't log in?

#### 6. Click Allow Access

OneF	Practice Sync wants access to:
ccour	it data
4	Hansens Solutions XYZ and
19	Associates
	manager data
User ac	count information
പ്പ	Nick Beaugeard
<u></u>	View your name, email, and user profile.
3y allowini between X accordanc provider's	g access, you agree to the transfer of your data ero Practice Manager and this application in e with Xero's Terms of use and the application terms of use and privacy policy.
You can di general se	sconnect at any time by going to Add-ons in your tlings.
	Allow access

7. The Application will run and your system will be synchronised and working.

ConePractice Sync XPM Sync Registration Complete! Your XPM clients synch will occur every 3 hours Perform manual synch below Get Synch Data

8. Click Get Sync Data to run synchronisation Now.

Finally, if clients have issues with templates, scans or mail, ask them to simply refresh the application with the inbuilt refresh button and all will be resolved.