Enabling OnePractice Sync with Xero Practice Manager

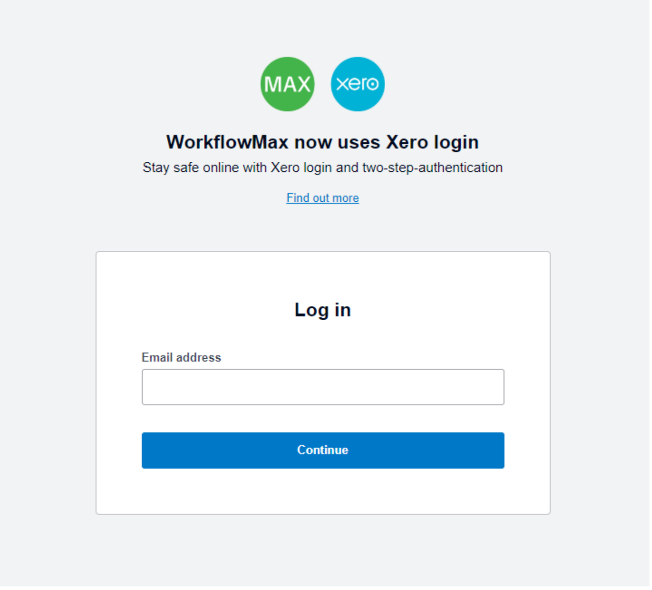
HubOne has changed the way we integrate with Practice Management Solutions. This makes you more secure and offers enhanced functionality.

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

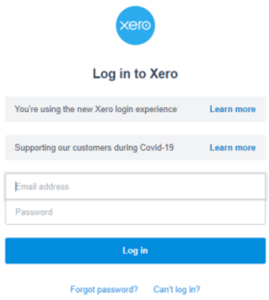
Enable API Access in Xero Practice Manager

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



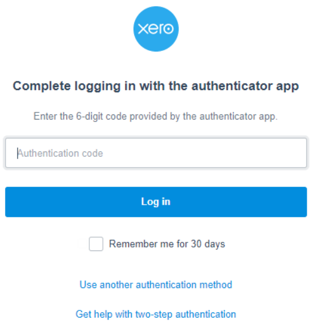
Enter Email Address and Click **Continue**

2. Xero will then prompt for a login.



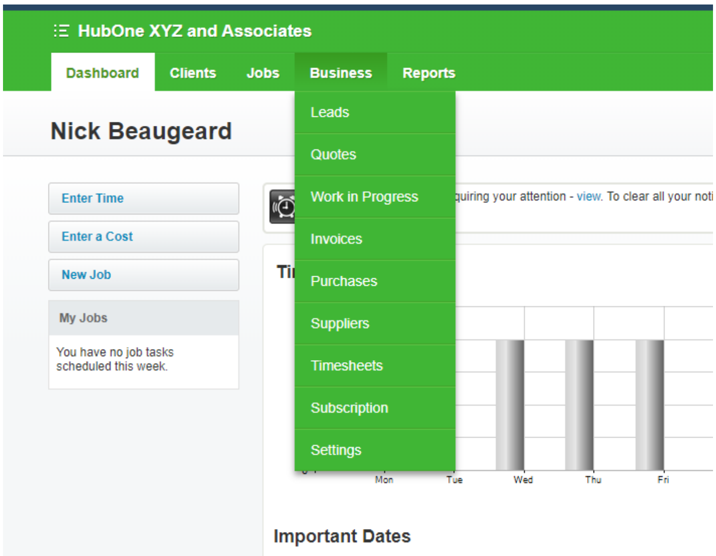
Enter email address and password and click **log in**

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

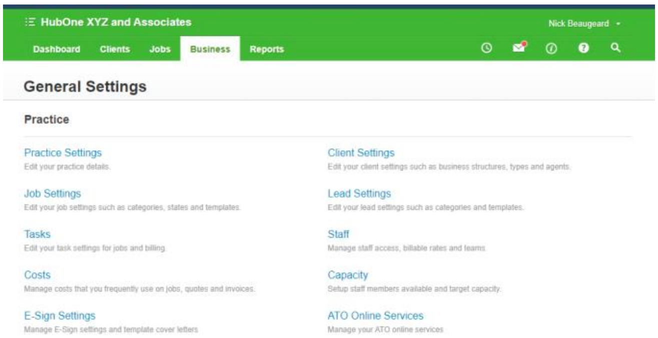


4. On the menu bar, click **Business**

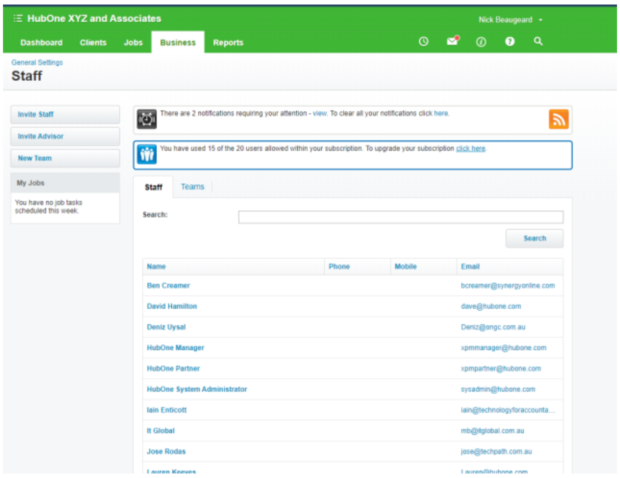
5. Choose Settings



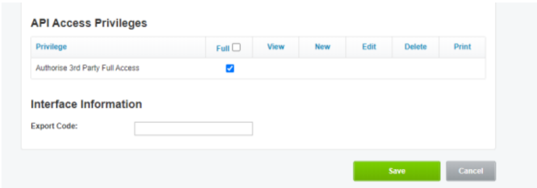
6. Click **Staff**



7. Select the staff member you wish to modify



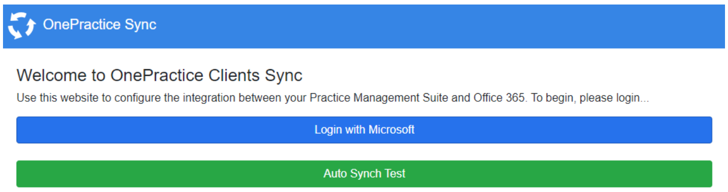
8. Scroll down to the bottom of the page



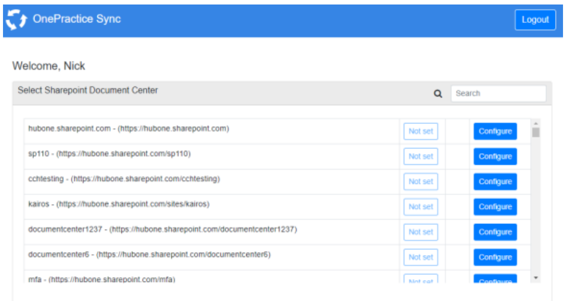
Ensure Authorise 3rd Party Full Access is checked and click Save.

Integrate HubOne Practice Sync

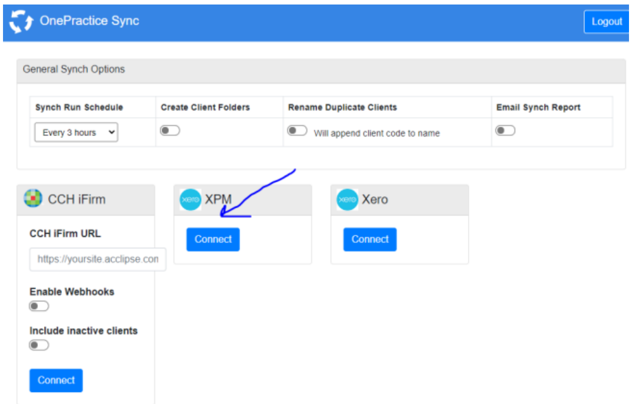
1. Navigate to https://practicesync.azurewebsites.net/



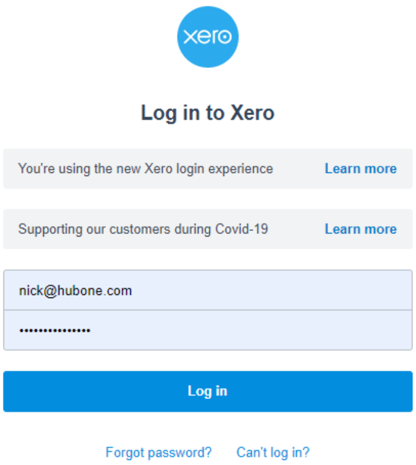
2. Click **Login with Microsoft** and login using your Office 365 username and password
3. Next, select the documentcenter you wish to configure and click **configure**



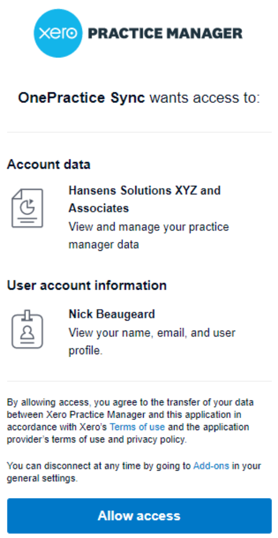
4. Click Connect XPM



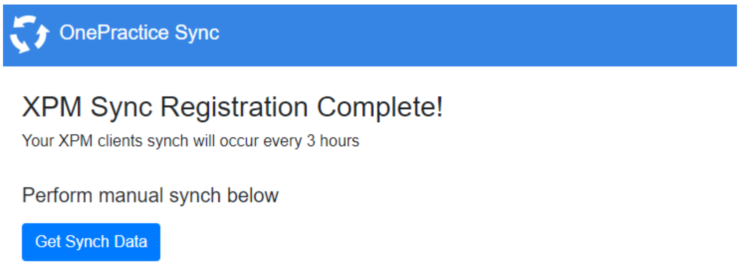
5. Login to Xero with the account edited above



6. Click **Allow Access**



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



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.