

Enabling OnePractice Sync with Xero Practice Manager

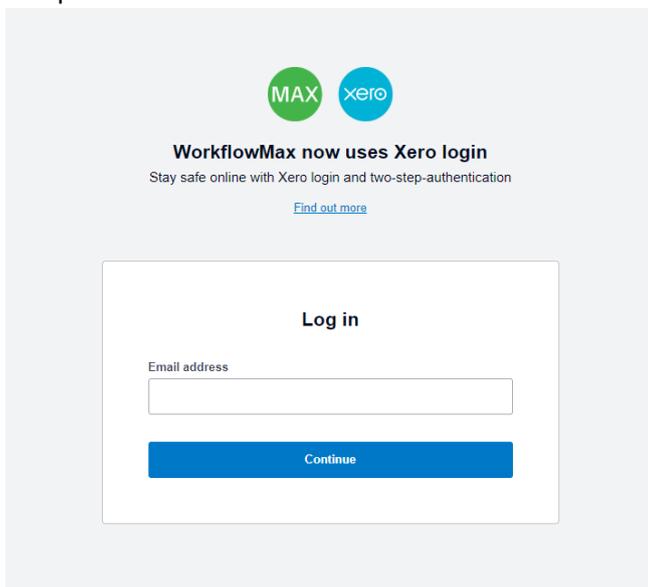
HubOne has changed the way we integrate with Practice Management Solutions. This makes you more secure and offers enhanced functionality.

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

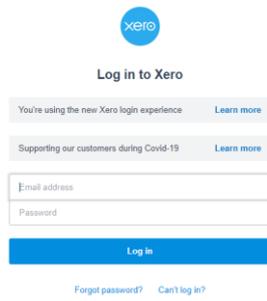
1. Login to Xero Practice Manager by navigating to <https://practicemanager.xero.com> – Some companies call this Green Xero.



The screenshot shows a login interface for WorkflowMax. At the top, there are two circular logos: a green one with 'MAX' and a blue one with 'xero'. Below the logos, the text reads 'WorkflowMax now uses Xero login' and 'Stay safe online with Xero login and two-step-authentication'. A link 'Find out more' is present. The main part of the page is a white box with the heading 'Log in'. Inside this box, there is a label 'Email address' above a text input field. Below the input field is a blue button labeled 'Continue'.

Enter Email Address and Click **Continue**

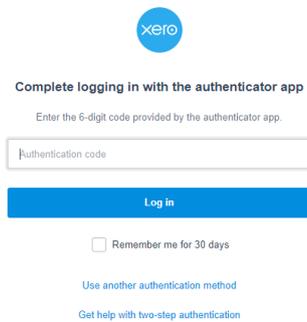
2. Xero will then prompt for a login.



The image shows the Xero login page. At the top is the Xero logo. Below it is the text "Log in to Xero". There are two links: "You're using the new Xero login experience Learn more" and "Supporting our customers during Covid-19 Learn more". Below these are two input fields: "Email address" and "Password". A blue "Log in" button is positioned below the fields. At the bottom, there are two links: "Forgot password?" and "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 code and click **log in**

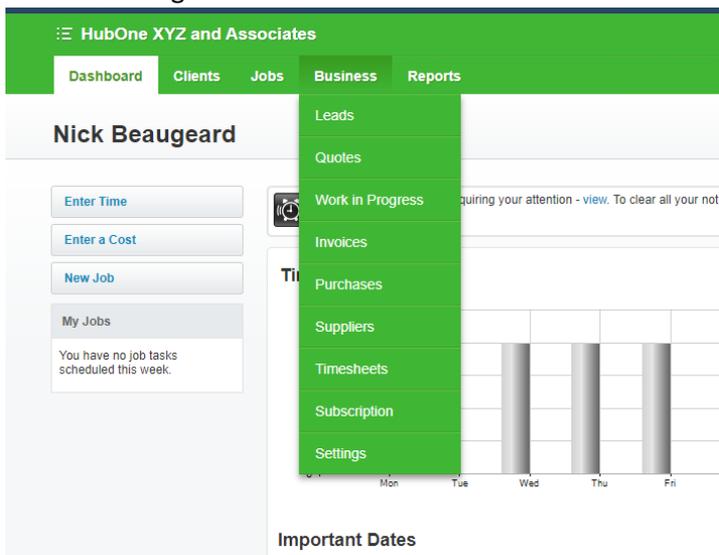


The image shows the Xero MFA page. At the top is the Xero logo. Below it is the text "Complete logging in with the authenticator app". There is a sub-header "Enter the 6-digit code provided by the authenticator app." Below this is an input field for the "Authentication code". A blue "Log in" button is below the field. At the bottom, there is a checkbox "Remember me for 30 days", a link "Use another authentication method", and a link "Get help with two-step authentication".

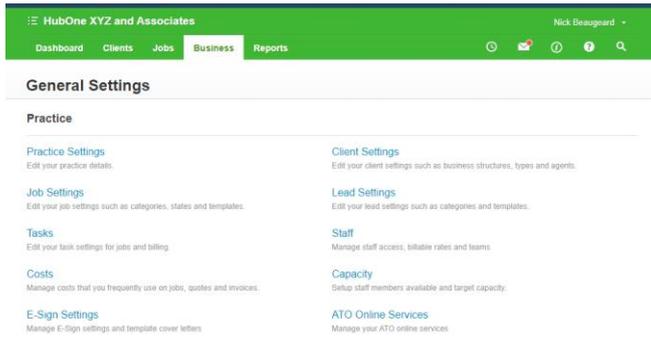
4. On the menu bar, click **Business**



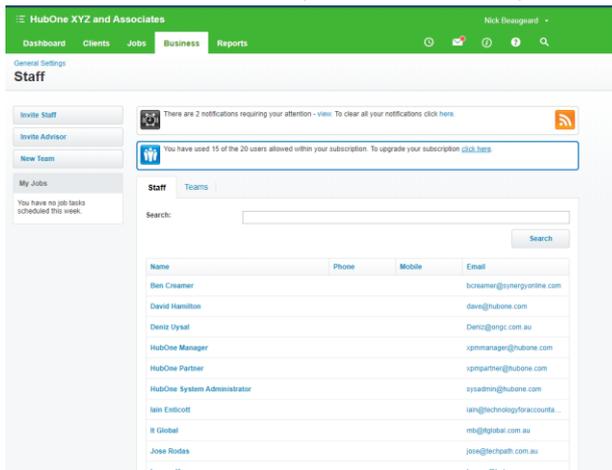
5. Choose Settings



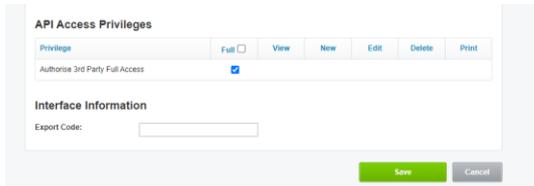
6. Click **Staff**



7. Select the staff member you wish to modify



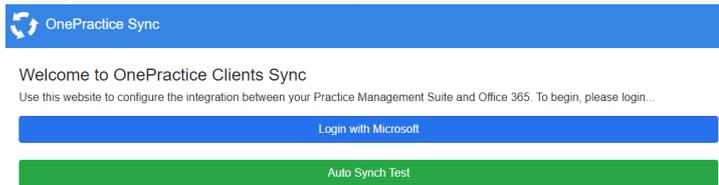
8. Scroll down to the bottom of the page



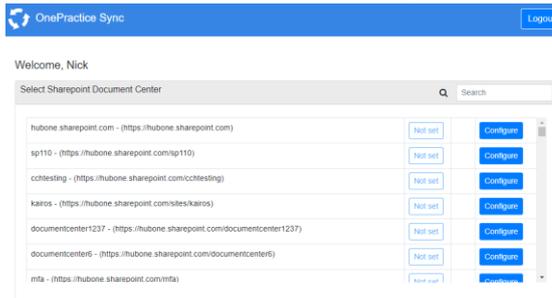
Ensure Authorise 3rd Party Full Access is checked and click Save.

Integrate HubOne Practice Sync

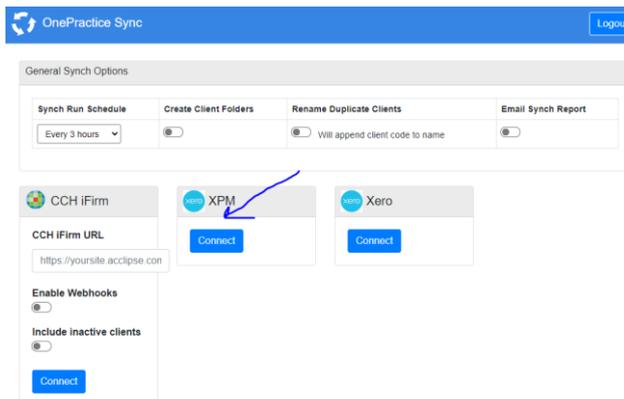
1. Navigate to <https://practicesync.azurewebsites.net/>



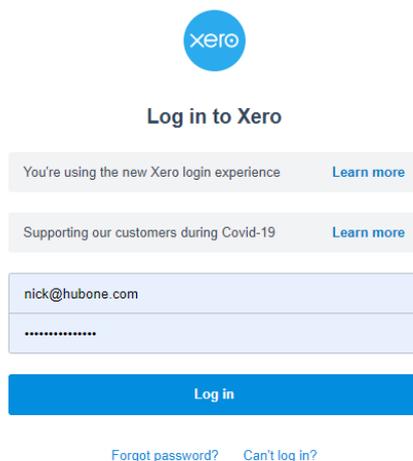
2. Click **Login with Microsoft** and login using your Office 365 username and password
3. Next, select the documentcenter you wish to configure and click **configure**



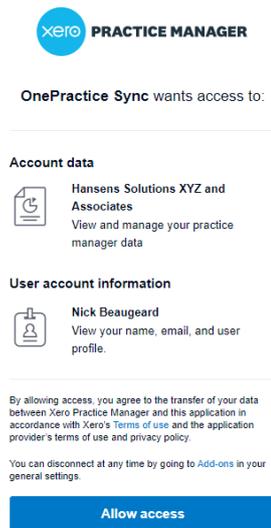
4. Click Connect XPM



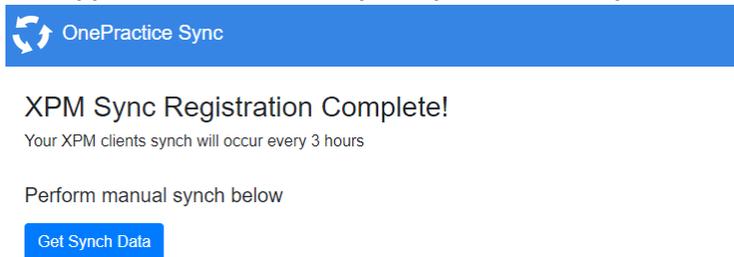
5. Login to Xero with the account edited above



6. Click **Allow Access**



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



8. **Click Get Synch 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.