



Preact Dynamics 365-> Xero Connector

Installation Guide

Microsoft
Partner



Gold Cloud Customer Relationship Management
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2020/2021 INNERCIRCLE
for Microsoft Business Applications

Overview

The purpose of this document is to guide the user on how to install the Dynamics 365 - Xero Connector solution.

Prerequisites

The prerequisites to install Dynamics 365 Xero Connector are highlighted below:

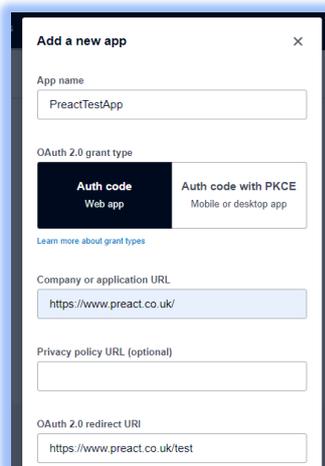
- Dynamics 365 Sales instance
- Xero Instance

Installation

To install Dynamics Xero Connector, go through the steps below to configure Xero and also Dynamics 365 application.

Xero Configuration

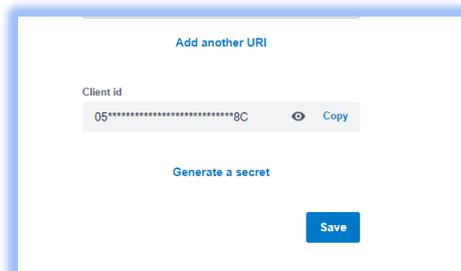
1. Create an **App** in Xero, to capture the **Client id**, **Client secret** and the **Code** values.
 - a. Navigate to <https://developer.xero.com>
 - b. Go to My Apps > New app > Private App and provide the details and click on **Create**. **Note** that the Application URL and the Redirect URL are required, however they can be any URL.



The screenshot shows the 'Add a new app' form in the Xero Developer Portal. The form includes the following fields and options:

- App name:** PreactTestApp
- OAuth 2.0 grant type:** Two options are shown: 'Auth code' (selected, for 'Web app') and 'Auth code with PKCE' (for 'Mobile or desktop app'). A link 'Learn more about grant types' is visible below.
- Company or application URL:** https://www.preact.co.uk/
- Privacy policy URL (optional):** (Empty field)
- OAuth 2.0 redirect URI:** https://www.preact.co.uk/test

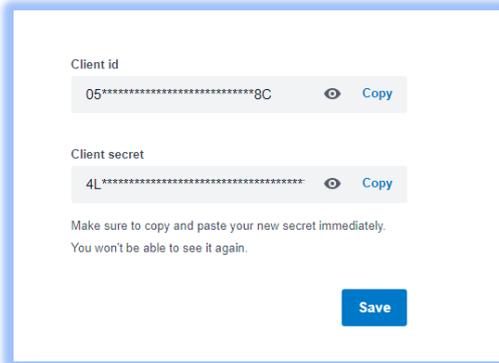
- c. Accept the terms and condition and click on the Create App, once you create the app you can see the details below and note it down. Copy the **Client id** and click on **Generate a secret**.



The screenshot shows the 'Add another URI' page in the Xero Developer Portal. It displays the following information:

- Client id:** 05*****8C (with a 'Copy' button next to it)
- Generate a secret:** A button to generate a secret key.
- Save:** A blue button at the bottom right to save the configuration.

- Copy and save the **Client id** and **Client secret** values and click on the **Save** button.



Client id
05*****QC Copy

Client secret
4L***** Copy

Make sure to copy and paste your new secret immediately.
You won't be able to see it again.

Save

- Generate Code**

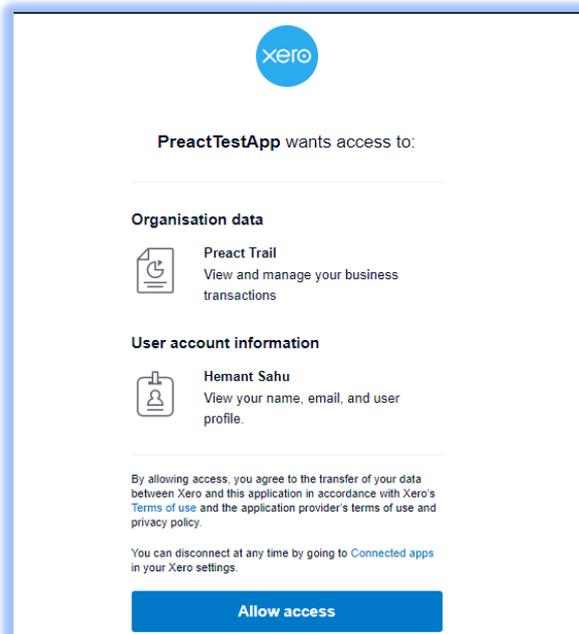
Replace the highlighted with the original value and open the URL on browser.

https://login.xero.com/identity/connect/authorize?response_type=code&client_id={clientId}&redirect_uri={redirectURL}&scope=offline_access openid profile email accounting.transactions accounting.contacts accounting.contacts.read accounting.settings &state=698

Example

https://login.xero.com/identity/connect/authorize?response_type=code&client_id=05E89C94F3D3427DB5DDDDF186B5758C&redirect_uri=https://www.preact.co.uk/test&scope=offline_access openid profile email accounting.transactions accounting.contacts accounting.contacts.read accounting.settings &state=854

Open the URL in Browser where you have logged-in in your Xero and click on the **Allow Access**



xero

PreactTestApp wants access to:

Organisation data

 **Preact Trail**
View and manage your business transactions

User account information

 **Hemant Sahu**
View your name, email, and user profile.

By allowing access, you agree to the transfer of your data between Xero and this application in accordance with Xero's [Terms of use](#) and the application provider's terms of use and privacy policy.

You can disconnect at any time by going to [Connected apps](#) in your Xero settings.

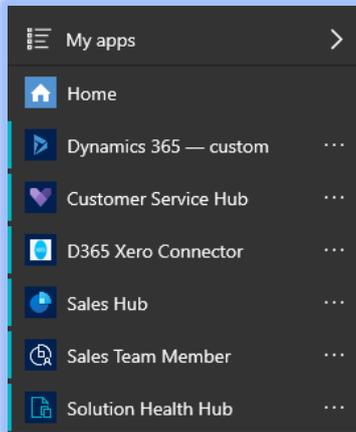
Allow access

Once you click on the **Allow Access** you will be redirected to your **Redirect URL** (that was provided in previous step. Copy and save the **Code** from URL address (highlighted below):

https://www.preact.co.uk/test?code=e7f4985bdba12a3e488b9e5246f5aaa3c5366191b7ba67b3188cb37170e8aa14&scope=openid%20profile%20email%20accounting.transactions&state=854&session_state=EDlonstrPvzlpaho9ucz

Dynamics 365 Configuration

1. Install the **D365 Xero Connector** managed solution in your Dynamics 365 instance.
2. Open the **D365 Xero Connector**, model driven app



3. Click on **Xero Settings** and click on **New**, enter details as below and click **Save**.

New Xero Settings Hemant Kumar
Owner

General Settings

Application Name * PreactTestApp	Xero Tenant Id ---
Xero Client Id * 05E89C94F3D3427DB5DDDDF186B5758C	Xero Secret Key * SISuHpfFH6etKRNLftZD6X70fqTB07BEq9TFaya-lwQzf...
Xero Code * e7f4985bdba12a3e488b9e5246f5aaa3c5366191b7...	Return URI * https://www.preact.co.uk/test
	Refresh Token ---

D365 Xero Connector has been successfully installed.

Note!

When to regenerate the Xero Code:

1. When we install Xero Connector for the first time, we need to generate the Xero Code.
2. Xero Code and Token (Refresh Token) is active for 60 days, if there is no transaction done within 60 days from D365 to Xero then we need to regenerate the code same as mentioned at step 3.
3. If there is any Integration log on the 'D365 To Xero Integration' record with message 'invalid_request, please re-generate code and retry.' then we need to regenerate the code same as mentioned at step 3.

D365 to Xero Integration - Get Xero Connection Details - 6/9/2020 9:37:06 AM
 D365 To Xero Integration Log

6/9/2020 3:07 PM **SYSTEM** **Failed**
Created On Owner Status

General Related

Name	* D365 to Xero Integration - Get Xero Connection Deta...	Event	Create
Parent Entity	---	Regarding Account	---
Status	Failed	Regarding Contact	---
		Regarding Product	---
		Regarding WriteIn Product	---
		Regarding Order	---
Message	invalid_request, please re-generate code and retry.		

Activate Windows
Go to Settings to activate Windows.