

Xero Integration Setup

The comprehensive dashboards and smart Business Intelligence (BI) solutions that come with Xero's integration with MSPbots provide small businesses with more opportunities to grow and enhance business management. This article is your guide for setting up this integration so that you can start utilizing MSPbots automation with Xero to get books done faster and to track bills and payments, inventory, invoicing, purchase orders, and reporting more efficiently.

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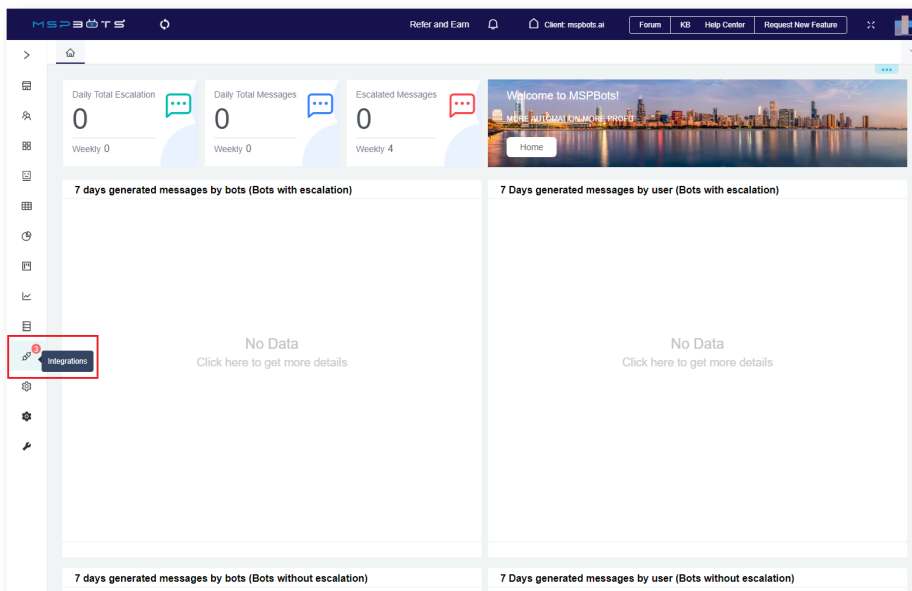
Prerequisites

You must have the following to ensure a successful connection between MSPbots and Xero:

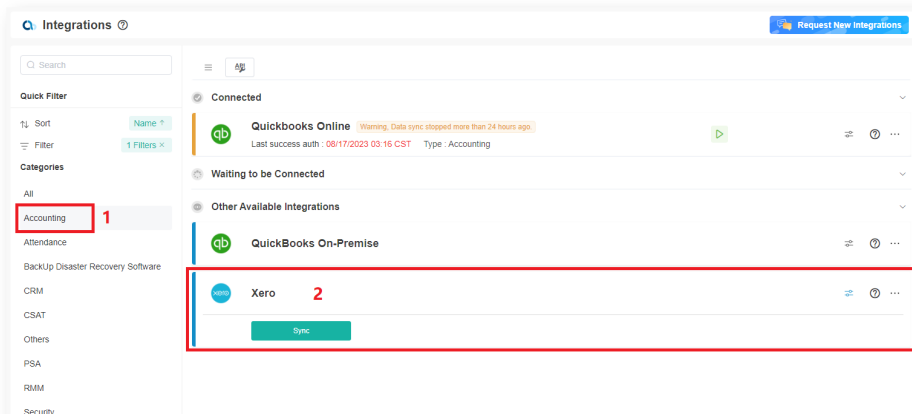
- A standard or advisor role to your account in the Xero app
- Admin role for modifying the settings in the MSPbots app

How to connect Xero to MSPbots

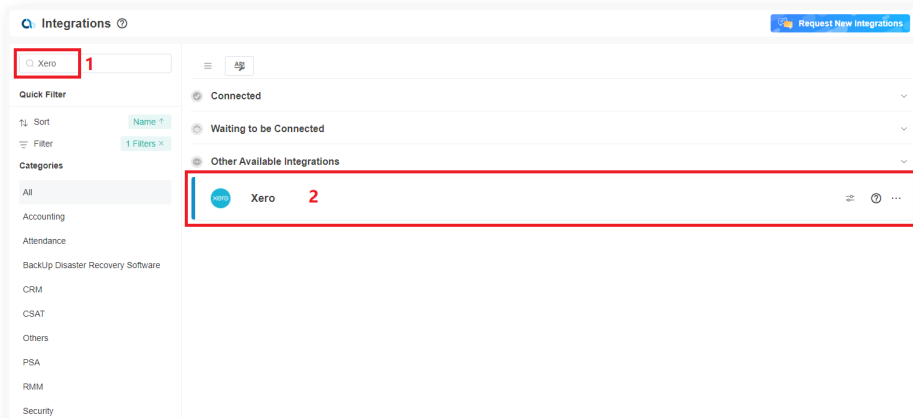
1. Open the MSPbots app and go to [Integrations](#).



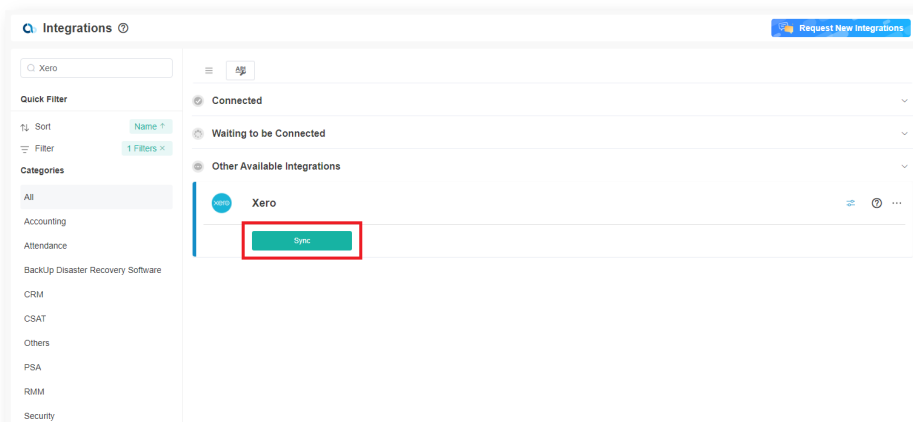
2. In the Integrations window, search for **Xero** and click it to open the connection settings.



As an alternative, go to the **Categories** section on the side menu, select **Accounting**, and click **Xero**.



3. Next, click **Sync** to authorize MSPbots to connect to your Xero company files. This action will open the login page for Xero. If you are already logged in, you will be directed straight to the Xero application.

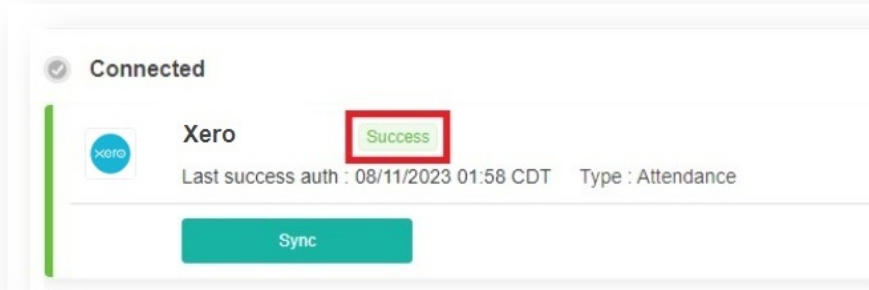


4. When the Log in to Xero pop-up opens, enter your Xero **Email address** and **Password** and click **Log in**.

A screenshot of the Xero login page. At the top is the Xero logo. Below it, the text 'Log in to Xero' is displayed. A red message says 'Please enter your email address and password'. There are two input fields: 'Email address' and 'Password'. Below these fields is a large blue button labeled 'Log in'. At the bottom, there are two links: 'Forgot password?' and 'Can't log in?'.

You have successfully connected MSPbots to Xero when the pop-up with the message "MSPbots oauth redirect success!" appears.

5. Go back to **Integrations** on the MSPbots app to verify your connection. The status "Success" should be displayed beside Xero.



The data sync should be completed within 20-30 minutes. Once the data source is saved, the dashboard, reports, datasets, and pointers will be added to your account.

Related Topics

- [Xero Public Dashboards](#)
- [Xero Public Widgets](#)
- [Xero Public Datasets](#)