

Adeptia Integration with XERO API

Table of Contents

Contents

A. Configuring Adeptia to consume xero API:	1
B. Testing XERO API using Postman	14
C. Signing up to Xero Account	19

A. Configuring Adeptia to consume xero API:

Collect the OAuth credentials from XERO for accessing XERO APIs. This is a prerequisite to start consuming the XERO APIs. Based on the credentials the xero API will allow access to the APIs.

1. Create OAuth Policy in the Adeptia end based on the OAuth credentials. Pass the following fields
 - a. Login to Adeptia Connect Portal, click on "Configure" -> "Accounts" -> "OAuth Profile".
 - b. Click on "Create OAuth Profile" button
 - c. Enter the OAuth Profile name that needs to be created
 - d. Select value for OAuth version as "2.0"
 - e. Select value for OAuth Grant Type as "Authorization Code Grant"
 - f. Enter value for Client Identifier with the ClientID from xero
 - g. Enter value for Client Secret with the client Secret from xero
 - h. Enter the value for Authorization URL as
<https://login.xero.com/identity/connect/authorize>
 - i. Enter the value for access token URL as <https://identity.xero.com/connect/token>
 - j. Enter the value for scopes as "accounting.transactions" (Please note multiple scopes can be added based on the use case)
 - k. Click on "Save" button to Save Profile.

Auth Url - [hhttps://login.xero.com/identity/connect/authorize](https://login.xero.com/identity/connect/authorize)

Access token url - <https://identity.xero.com/connect/token>

Call back Url for Postman - <https://www.getpostman.com/oauth2/callback>

Call back Url for Adeptia Connect Services Environment-
<https://services.adeptia.com:443/rest/oauth/account>

Scope - accounting.transactions

Operational Partners Transaction Dashboard **Configure**

Process Flow ▶	AK_Oauth_QuickBookPersonal_Profile
Templates ▶	AK_Oauth_Quickbook_Profile
Web Forms ▶	RS_VeteranAPI
Developer Studio ▶	AK_Oauth_Xero_Profile
ACCOUNTS 	
Database Driver ▶	
Database Info ▶	
FTP ▶	
HTTP ▶	
JDBC ▶	
JMS Provider ▶	
Kafka ▶	
Mail ▶	
MLLP Configuration ▶	
NetSuite ▶	
OAuth ▶	
OAuth Profile ▶	

Displaying 1 - 4 of 4

Edit OAuth Profile



Provide a name for this OAuth profile ⓘ

Access Information

OAuth Version ⓘ

OAuth Grant Type ⓘ

Client Identifier ⓘ

Client Secret ⓘ

Cancel

 Save

Edit OAuth Profile

Authorization URL ⓘ

Access Token URL ⓘ

Scope ⓘ

Callback URL ⓘ

Select Project

Cancel

2. Create OAuth account in the Adeptia end based on the OAuth credentials.
 - a. Login to Adeptia Connect Portal, click on “Configure” -> “Accounts” -> “OAuth Account”.
 - b. Click on “Create OAuth Account” button
 - c. Enter a name for OAuth account to be created.
 - d. Select the OAuth Profile created from Step 2
 - e. Select the Current Project
 - f. Click on “Get Access Token and Save” button
 - i. If Authentication is successful, the token will be created, and window will close to save the token.
 - ii. If Authentication is unsuccessful, then the Authentication failure message and reason is displayed. (Please verify the authentication credentials and retry)



Operational



Partners



Transaction



Dashboard



Configure

- Web Forms ▶
- Developer Studio ▶

ACCOUNTS -

- Database Driver ▶
- Database Info ▶
- FTP ▶
- HTTP ▶
- JDBC ▶
- JMS Provider ▶
- Kafka ▶
- Mail ▶
- MLLP Configuration ▶
- NetSuite ▶
- OAuth** ▶
- OAuth Profile ▶

- AK_OAuth_Quickbook_Account
- RS Dropbox
- newtest3
- newtest1
- testaccnew
- testacc10
- testacc7
- testacc6
- testacc5
- Testacc4

Displaying 1 - 12 of 22

Create OAuth Account ✕

Provide a name for this OAuth account

Use In Mail Activity

Access Information

Select OAuth Profile to use for this account

 ▼ +

Select Project

 ▼

Cancel  **Get Access Token and Save**

3. Create Security Policy for the Web service
 - a. Login to Adeptia Connect Portal, click on "Configure" -> "Web Services" -> "Security Policy".
 - b. Click on "Create Security Policy" button
 - c. Enter the Name and Description for the security Policy
 - d. Select the value of "Security Policy Type" as "WS Consumer"
 - e. Expand "Authentication Properties" option and select "Authentication" checkbox
 - f. Select value of "Authentication type" as "OAuth"
 - g. Select value of "OAuth Account" as the OAuth Xero Account which was created in previous step.
 - h. Click on Save button to save settings.

Edit Security Policy: AK_OAuth_Xero_SecurityPolicy
✕

Standard Properties

Name*

Description*

Security Policy Type WS Provider WS Consumer HTTP Source

Authentication Properties

Authentication

Authentication Type*

OAuth Account*

SSL Properties
 Outgoing Message Properties
 Incoming Message Properties
 Advanced Properties

* Mandatory fields.

4. Create webservice consumer for calling actual Xero API with the following Endpoint config, Header params, and Oauth policy configured in step 2.

- a. Login to Adeptia Connect Portal, click on "Configure" -> "Web Services" -> "REST Consumer".
- b. Click on "Create REST Consumer" button
- c. Enter the Name and Description for the webservice Consumer
- d. Enter the "URL" field with the XERO API URL, example - <https://api.xero.com/api.xro/2.0/Invoices>
- e. Add the parameters Content-Type and xero-tenant-id
 - i. Content-Type application/json
 - ii. xero-tenant-id \$\$xerotenantid\$\$

The \$\$xerotenantid\$\$ represents the context variable which will be set in the Process flow.

Please add as many parameters as needed for the required API call

- f. Select the value for "Security Policy" as the OAuth security Policy which was created in previous step.
- g. Click on "Save" button to save the webservice Consumer

Process Flow	▶
Templates	▶
Web Forms	▶
Developer Studio	▶
ACCOUNTS	+
CUSTOM DASHBOARD	+
DATA TRANSFORMATION	+
EDI	+
EVENTS	+
EXTENSIONS	+
LAYOUTS	+
SECURITY	+
SOURCES	+
TARGETS	+
WEB SERVICES	-
REST Consumer	▶
REST Provider	▶

AK_Quickbook_WebConsumerV1
AK_Quickbook_Webservice_New
AK_QuickBookAPI_WebServiceConsumer
AK_XeroAPI_WebServiceConsumer
AK_GetXeroTenantId_Webservice
AK_ZipCodeAPI_WebServiceConsumer
IF_RedHatRuleEngine_WSC
test_Affinity_getToken
ANGI_GSH_WC_D365_GetData_VendorMaster
ANGI_GSH_WC_D365toOR_Contact
AFFINITY_WC_D365FO_InsertBulkData
ANGI_GSH_WC_ORD365_CustomerMaster_Invoic
Displaying 1 - 12 of 42

Edit REST Consumer: AK_XeroAPI_WebServiceConsumer

Description* AK_XeroAPI_WebServiceConsumer

Character Set Encoding* UTF-8

URL* <https://api.xero.com/api.xro/2.0/Invoices>
 Extract Params From URL

#	Name	Value	Style
1	Content-Type	application/json	Header
2	xero-tenant-id	\$\$xerotenantid\$\$	Header

Parameter

No. of Rows 1 at Position 5 Add Row Remove Row

Method* Get

Type	Media Type	Variable Name
RESPONSE	application/text	restResponse
FAULT	application/text	restFault

Presentation

Security Policy AK_OAuth_Xero_SecurityPolicy

Save

6. Create webservice consumer for fetching the tenantId from xero API, with the following Endpoint config, Header params, and OAuth policy configured previously
 - a. Login to Adeptia Connect Portal, click on "Configure" -> "Web Services" -> "REST Consumer".
 - b. Click on "Create REST Consumer" button
 - c. Enter the Name and Description for the webservice Consumer
 - d. Enter the "URL" field with the XERO connections API URL, example - <https://api.xero.com/connections>
 - e. Select the value for "Security Policy" as the OAuth security Policy which was created in previous step.
 - f. Click on "Save" button to save the webservice Consumer

Edit REST Consumer: AK_GetXeroTenantId_Webservice

Description* AK_GetXeroTenantId_Webservice

Character Set Encoding* UTF-8

URL* https://api.xero.com/connections

#	Name	Value	Style
1			Query
2			Query

Parameter

No. of Rows 1 at Position 5

Method* Get

Type	Media Type	Variable Name
RESPONSE	application/text	restResponse
FAULT	application/text	restFault

Presentation

Security Policy AK_OAuth_Xero_SecurityPolicy

7. Create Process Flow for calling webservice consumer

- a. Login to Adeptia Connect Portal, click on "Configure" -> "Process Flow"
- b. Click on "Create Process flow" button
- c. Define the process flow to call the webservice consumer
 - i. To get the xerotenantid from the xero application, make a call to the connections API configured in webservice consumer
 - ii. Use the Data Mapping to map the json response field "tenantId" to the ContextLayout field "xerotenantid"
 - iii. Call the actual xero invoices API, by using the webservice consumer which was previously configured.

All Projects ▼

- Projects ▶
- Process Flow ▶
- Templates ▶
- Web Forms ▶
- Developer Studio ▶

+ CREATE
Process Flow
↻

NAME	DESCRIPTION
AK_Quickbook_ProcessFlow_v1	AK_Quickbook_ProcessFlow_v1
AK_Quickbook_ProcessFlow_New	AK_Quickbook_ProcessFlow_New
AK_Quickbook_ProcessFlow	AK_Quickbook_ProcessFlow
AK_Xero_Connections_ProcessFlow	AK_Xero_Connections_ProcessFlow

Process flow



Data Mapper

8. Executing the Process Flow

- a. Click on Configure -> process flow,
- b. Click on Actions button to execute the corresponding process flow
- c. Verify in Dashboard.
- d. Checks the repository logs for the API response

[Log Cleanup/Archival Error Click here for details](#)

All Projects + CREATE Process Flow ↻ Search Process Flow

	NAME	DESCRIPTION	PROJECT	OWNER	MODIFIED	PUBLISHED	ACTION
Projects	AK_Quickbook_ProcessFlow_v1	AK_Quickbook_ProcessFlow_v1	Default	Admin Admin	Today 5:45 PM	Unpublished	OFF <input type="checkbox"/> ON <input type="checkbox"/>
Process Flow	AK_Quickbook_ProcessFlow_New	AK_Quickbook_ProcessFlow_New	Default	Admin Admin	Today 4:38 PM	Unpublished	OFF <input type="checkbox"/> ON <input type="checkbox"/>
Templates	AK_Quickbook_ProcessFlow	AK_Quickbook_ProcessFlow	Default	Admin Admin	Today 4:30 PM	Unpublished	OFF <input type="checkbox"/> ON <input type="checkbox"/>
Web Forms	AK_Xero_Connections_ProcessFlow	AK_Xero_Connections_ProcessFlow	Default	Admin Admin	Nov 18 3:48 PM	Unpublished	OFF <input type="checkbox"/> ON <input type="checkbox"/>
Developer Studio	AK_Xero_ProcessFlow	AK_Xero_ProcessFlow	Default	Admin Admin	Nov 17 9:16 PM		
ACCOUNTS	AK_ZipCode_ProcessFlow	AK_ZipCode_ProcessFlow	Default	Admin Admin	Nov 17 8:25 PM		
CUSTOM DASHBOARD	SS_EmployeeBenefitsProcessFlow	Process flow for employee benefits Practice	Project_1	Sameera Sita	Oct 14 1:26 PM		
DATA TRANSFORMATION	AD_EmployeeBenefitsProcessFlow	process flow for employee benefitz	Project_1	Abishek Donthamsetty	Oct 13 7:12 PM		
EDI	AD_Training_ProcesFlow	AD_Training_ProcesFlow	Project_1	Abishek Donthamsetty	Sep 29 1:57 PM		
EVENTS	Revamp_MST_PF_ProcessFlowMonitoringDet...	This Process Flow is designed to Monitor the R...	Default	Admin Admin	Aug 16 12:42 PM		
EXTENSIONS	CE_EmployeeBenefitsProcessFlow_Copy	process flow for employee benefitz	Project_1	Carlos Escabalzeta	Aug 12 9:43 PM		
LAYOUTS							

- ✎ Edit
- ✖ Delete
- 📄 Copy
- 📄 New
- ⚙️ Evaluate
- 🔗 Bind Event
- 🔗 Unbind Event(s)
- 📄 New Event
- 🔍 Check-in
- 🔍 Trackback
- 🔄 Refresh With
- 🕒 Revision History
- 📄 Publish as Post Process
- 📄 Publish as Template
- 🔗 View Dependencies
- 🔗 View References

✔ A job has been submitted to Queue Processor for executing a process flow **AK_Xero_Connections_ProcessFlow**
[Visit Dashboard for execution logs of this process flow.](#)

All Errors Search All Messages Current Logs ↻

TRANSACTION	TEMPLATE	PARTNER	USER ID	TYPE	STARTED ↓	REFERENCE	STATUS	ACTION
AK_Xero_Connections_ProcessFlow			admin	Process Flow	Today 6:35 PM	AK_Xero_Connections_Pro...	✔	🔄
AK_Quickbook_ProcessFlow_v1			admin	Process Flow	Today 5:45 PM	AK_Quickbook_ProcessFlo...	✔	🔄
AK_Quickbook_ProcessFlow_v1			admin	Process Flow	Today 5:16 PM	AK_Quickbook_ProcessFlo...	✔	🔄

B. Testing XERO API using Postman

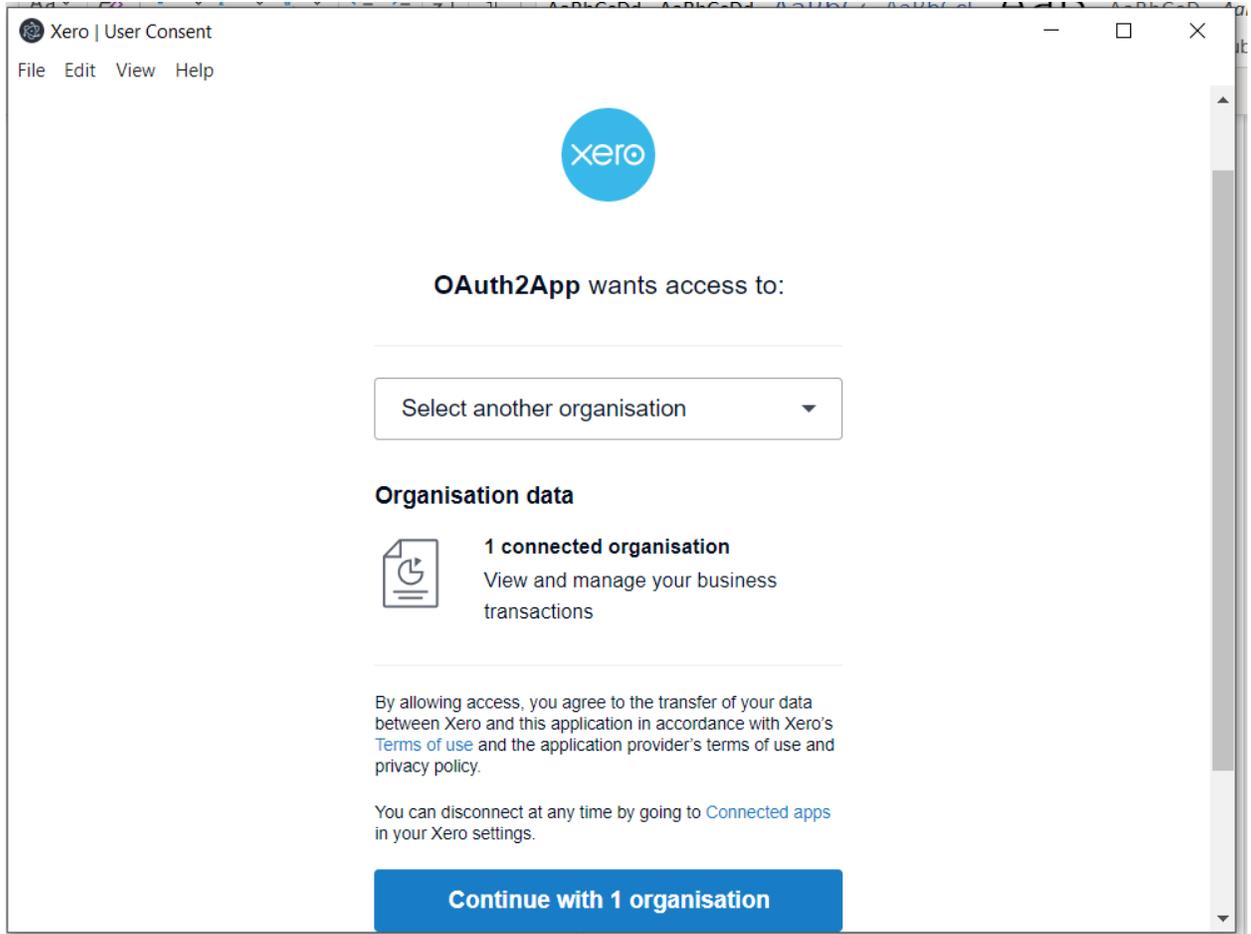
Open Postman -> Authorization Tab -> OAuth 2.0 -> Configure New Token.
Enter the following values which is got from xero application

The screenshot shows the Postman interface for configuring a new OAuth 2.0 token. The URL bar shows a GET request to `https://api.xero.com/connections...`. The 'Authorization' tab is active, and the 'Configure New Token' section is expanded. The configuration is as follows:

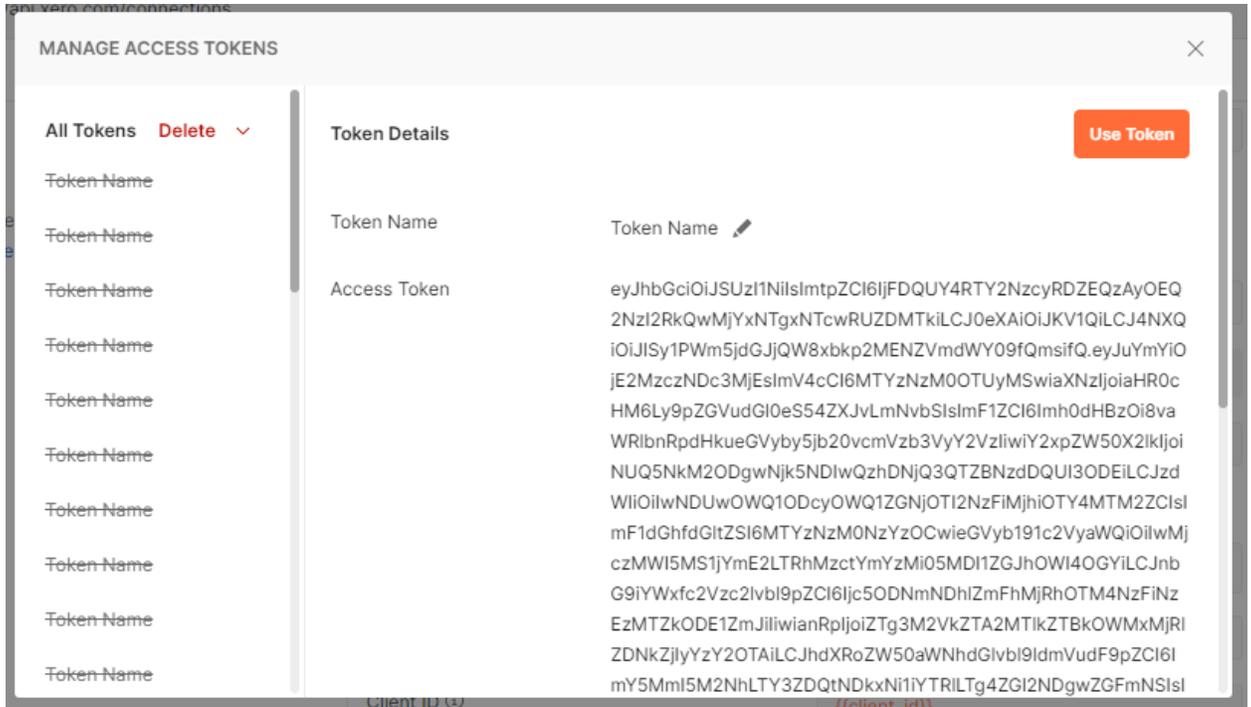
Field	Value
Type	OAuth 2.0
Header Prefix	Bearer
Grant Type	Authorization Code
Callback URL	{{re_directURI}}
Auth URL	https://login.xero.com/identity/connect/autl...
Access Token URL	https://identity.xero.com/connect/token
Client ID	{{client_id}}
Client Secret	{{client_secret}}
Scope	{{scopes}}
State	12345678
Client Authentication	Send as Basic Auth header

Additional options include 'Authorize using browser' (unchecked) and a 'Clear cookies' button. A red 'Get New Access Token' button is located at the bottom of the configuration panel.

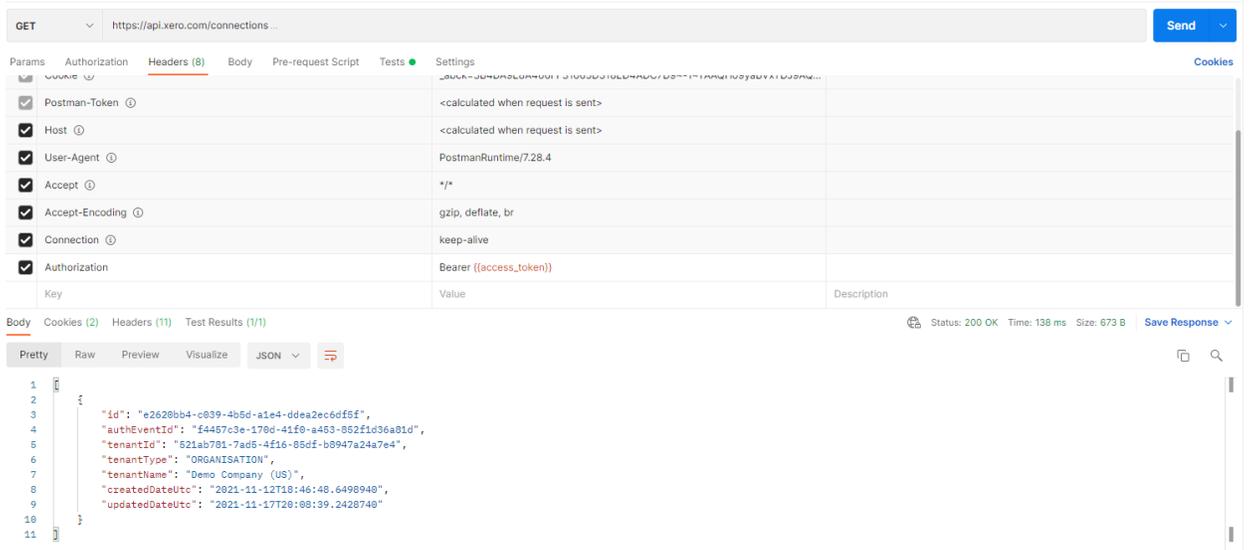
Click on Get New Access Token, opens a model with Xero login and company details. Select accordingly and continue.



Access Token is generated. Save the Access token and refresh token to environment variable.



Make the Connections API call to get the xero-tenant-id, Save the xero-tenant-Id in environment variable



Make the actual XERO API call to get response. AUTH token and xero-tenant-Id will be used from environment variable

GET https://api.xero.com/api.xro/2.0/BankTransactions ...

Params Authorization Headers (11) Body Pre-request Script Tests Settings

Key	Value	Description
Accept	*/*	
Accept-Encoding	gzip, deflate, br	
Connection	keep-alive	
xero-tenant-id	{{xero-tenant-id}}	
Authorization	Bearer {{access_token}}	
Accept	application/json	
Content-Type	application/json	

Body Cookies (2) Headers (13) Test Results Status: 200 OK Time: 228 ms Size: 15.72 KB Save Response

Pretty Raw Preview Visualize JSON

```

1  {
2    "Id": "2ee81971-608f-4e65-87e9-a212d5db90c2",
3    "Status": "OK",
4    "ProviderName": "OAuth2App",
5    "DateTimeUTC": "/Date(1637347890221)/",
6    "BankTransactions": [
7      {
8        "BankTransactionID": "9575e6f9-fead-4456-bfba-aeFed46937f2",
9        "BankAccount": {
10         "AccountID": "ceef66a5-a545-413b-9312-78a53caadbc4",
11         "Code": "890",
12         "Name": "Checking Account"
13       },
14       "Type": "SPEND",
15       "Reference": ""
16     }
17   ]
18 }

```

A. Sample Transactions Request Response

a. GET Bank Transactions API

Endpoint - <https://api.xero.com/api.xro/2.0/BankTransactions>

Response:

```

{
  "Id": "843ebfb1-09da-41f5-b71b-4467ca969d2a",
  "Status": "OK",
  "ProviderName": "OAuth2App",
  "DateTimeUTC": "/Date(1637005536456)/",
  "BankTransactions": [
    {
      "BankTransactionID": "9575e6f9-fead-4456-bfba-aeFed46937f2",
      "BankAccount": {
        "AccountID": "ceef66a5-a545-413b-9312-78a53caadbc4",

```

b. POST Update Bank Transactions API

Endpoint -

<https://api.xero.com/api.xro/2.0/BankTransactions/cd94b413-0250-49ab-8dfc-185827a5662d>

Request:

```
{ "BankTransactions": [ { "Type": "SPEND", "Contact": { "ContactID": "00000000-0000-0000-0000-000000000000", "ContactStatus": "ACTIVE", "Name": "Buzz Lightyear", "FirstName": "Buzz", "LastName": "Lightyear", "EmailAddress": "buzz.Lightyear@email.com", "ContactPersons": [], "BankAccountDetails": "", "Addresses": [ { "AddressType": "STREET", "City": "", "Region": "", "PostalCode": "", "Country": "" }, { "AddressType": "POBOX", "AddressLine1": "", "AddressLine2": "", "AddressLine3": "", "AddressLine4": "", "City": "Palo Alto", "Region": "CA", "PostalCode": "94020", "Country": "United States" } ], "Phones": [ { "PhoneType": "DEFAULT", "PhoneNumber": "847-1294", "PhoneAreaCode": "(626)", "PhoneCountryCode": "" }, { "PhoneType": "DDI", "PhoneNumber": "", "PhoneAreaCode": "", "PhoneCountryCode": "" }, { "PhoneType": "FAX", "PhoneNumber": "", "PhoneAreaCode": "", "PhoneCountryCode": "" }, { "PhoneType": "MOBILE", "PhoneNumber": "", "PhoneAreaCode": "", "PhoneCountryCode": "" } ], "UpdatedDateUTC": "2017-08-21T13:49:04.227-07:00", "ContactGroups": [] }, "LineItems": [], "BankAccount": { "Code": "088", "Name": "Business Wells Fargo", "AccountID": "00000000-0000-0000-0000-000000000000" }, "IsReconciled": false, "Date": "2019-02-25", "Reference": "You just updated", "CurrencyCode": "USD", "CurrencyRate": 1, "Status": "AUTHORISED", "LineAmountTypes": "Inclusive", "TotalTax": 1.74, "BankTransactionID": "00000000-0000-0000-0000-000000000000", "UpdatedDateUTC": "2019-02-26T12:39:27.813-08:00" } ] }
```

Response:

```
{  
  "ErrorNumber": 10,  
  "Type": "ValidationException",  
  "Message": "A validation exception occurred",  
  "Elements": [  
    {  
      "BankTransactionID": "cd94b413-0250-49ab-8dfc-185827a5662d",  
      "BankAccount": {  
        "AccountID": "00000000-0000-0000-0000-000000000000",  
        "Code": "088",  
        "Name": "Business Wells Fargo",  
        "ValidationErrors": []  
      }  
    }  
  ]  
}
```

c. Error Scenarios: Invalid or missing xero-tenant-id

Error Response:

```
{  
  "Type": null,  
  "Title": "Forbidden",  
  "Status": 403,  
  "Detail": "AuthenticationUnsuccessful",  
  "Instance": "5bfc2679-9b20-4cca-9c3d-c34b387766dc",  
  "Extensions": {}  
}
```

d. Error Scenarios: Invalid or Missing Oauth access token in header

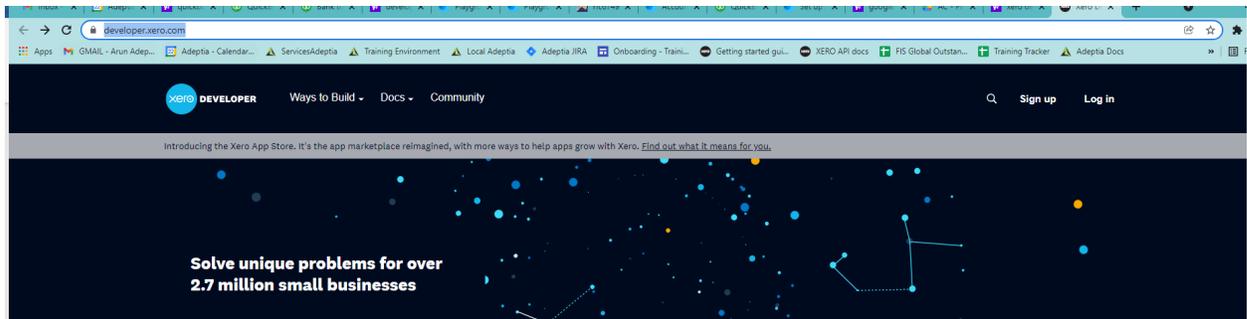
Error Response:

```
oauth_problem=consumer_key_unknown&oauth_problem_advice=Consumer%20key%20was%20not%20recognised
```

C. Signing up to Xero Account

Login to below url to sign for a xero account

<https://www.xero.com/us/signup/>



Enter the following details and submit

First name

Last name

Email

Phone

Location

I'm not a robot  reCAPTCHA
[Privacy](#) - [Terms](#)

I've read and agreed to the terms of use, privacy notice and offer details:

[Terms of use](#), [privacy notice](#), and [offer details](#).

Next: Confirmation

- 1 Intro
- 2 Choose an app
- 3 Set up app
- 4 Add a backup



Add a second layer of security

To set up multi-factor authentication, you'll need an **authenticator app on your phone** and a **backup email address or security questions**.

[Set up multi-factor authentication](#)

Create a new APP



You haven't added any apps yet. Add an app to get started.

[New app](#)

Provide the company name, app url and redirect url.

Name

AdeptiaTestApp

Integration type

Web app

Standard auth code

Connect up to 25 organisations before certification

Mobile or desktop app

Auth code with PKCE. For native apps that can't securely store a client secret

Connect up to 25 organisations before certification

Custom connection

Premium one-to-one integration that utilises the client credentials grant type

Only available to Xero organisations in UK, Australia and New Zealand

[Learn more about integration types](#) 

Company or application URL

 **Company or application URL is required**

Login URL for launcher (optional)

URL will be used by launcher to log in to app. [Find out about launcher](#) 

Privacy policy URL (optional)

Terms and conditions URL (optional)

Click on the Configuration section to view the Client ID.
Click on Generate secret to create a client secret
Save clientid and clientsecret to be used in postman

[Apps](#) > [AdeptiaTestApp](#)
Configuration

The screenshot shows the configuration interface for an application. On the left is a sidebar with the following menu items: App details, Configuration (highlighted with a blue bar), History, Webhooks, and App Store application. The main content area is titled 'Connection' and shows '0 of 25 connections'. It contains a 'Redirect URIs' section with a text input field containing 'https://www.getpostman.com/oauth2/callback' and a 'Learn about redirects' link. Below this is an 'Add another URI' button. The 'Client id' section shows a masked ID '51*****46' with an eye icon and a 'Copy' button. A 'Generate a secret' button is located below the client ID. At the bottom, there is a 'Login URL for launcher (optional)' text input field and a 'Find out about launcher' link.

Connection

0 of 25 connections

Redirect URIs

<https://www.getpostman.com/oauth2/callback>

[Learn about redirects](#) 

Add another URI

Client id

51.....46



Copy

Client secret 1

Wo.....U_



Copy

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

Login URL for launcher (optional)

URL will be used by launcher to log in to app. [Find out about launcher](#) 

Download the postman collection from Xero API. And start using the APIs.
<https://www.postman.com/xeroapi>



Overview Collections (4) APIs (1) Workspaces (1)

Xero API

The team looking after Xero's APIs and developer platform

500+ Profile views

<https://developer.xero.com/>

<https://twitter.com/xeroapi>

<https://github.com/xeroapi>

Members (2)

Adam Moore

Richard DeMarco

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Latest collections [View all collections →](#)

Xero OAuth 2.0 No Summary Last updated: 5 Sep, 2021	Custom Connections No Summary Last updated: 24 Jun, 2021	Accounting API The full set of endpoints from the Accounting API. You'll need a valid access token from the Xero OAuth 2.0 collection. Last updated: a year ago
--	---	--

Latest workspaces [View all workspaces →](#)

XeroAPI Get up and running with Xero's API
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