



Connect: Xero for Magento 1

A few quick notes before installing your extension:

- It's a great idea to [install any new extension on a test site](#) before adding it to your live site. Once you have successfully installed the new extension on your test site and are happy with its performance, repeat the extension installation on your live site. Distributed version control systems (such as git or mercurial) can be used to sync live and test sites with minimal effort
- The instructions below are for basic setups (one server which provides Apache, Mysql and PHP). For more advanced setups, the steps are still applicable but need to be adjusted to your particular setup. Your system administrator or web host can provide you with details
- [We don't recommend installing extensions via Magento Connect](#) - please follow the instructions below

If you prefer, we can install the extension for you (select at checkout or contact us).

Summary

[Step 1 - Turn off Magento's Compilation Mode](#)

[Step 2 - Turn on Magento's Configuration Cache](#)

[Step 3 - Install the Extension](#)

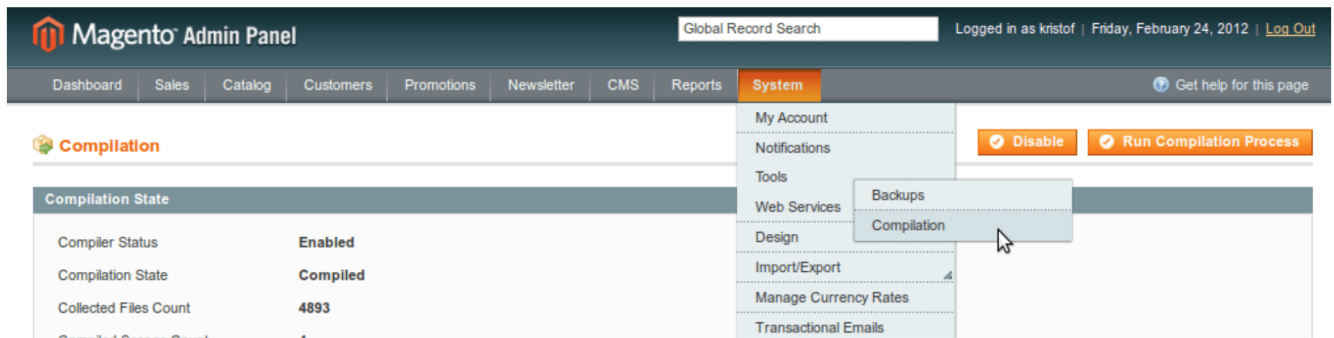
[Step 4 - Refresh Magento's Cache](#)

[Step 5 - Log Out of the Backend and Log Back In](#)

[Step 6 - Rerun Magento's Compilation Process](#)

Step 1 - Turn Off Magento's Compilation Mode

Check to see if Magento's compilation mode has been enabled. If it has, turn it off before installing an extension or making any code changes (go to **System > Tools > Compilation**). In a worst case scenario, not disabling compilation mode before installing an extension could make your site inaccessible (including the admin area). Yikes!



Command Line Equivalent: `php -f shell/compiler.php -- clear`

As part of this step we also recommend:

- **Backing up your Magento files** so you can revert back to a previous version if something unexpected happens during installation. If this is your first backup, take additional care to verify that the backup is both complete and functional by performing a trial run of your recovery process
- **Refreshing the cache** to ensure your site is running up-to-date code, refresh your Magento cache (see Step 4). Verify that your current site works as expected ([this is a good list of what to look for](#)). If you identify any issues with your existing site, it's much easier to resolve these before adding a new extension
- [Taking your store offline](#) before taking a database backup (below). If we kept the store online and needed to rollback to this backup, we would lose any orders placed after the backup was taken. The alternative to this approach would be to keep the store live, but to re-add those orders manually if you needed to revert back to the old database. To take your site offline to customers, but retain access to the backend yourself, you can redirect users (excluding yourself) to a static page saying that the site is currently unavailable but will be back online shortly
- [Creating a database backup](#)

Step 2 - Turn On Magento's Configuration Cache

Turn on Magento's configuration cache – this will prevent Magento from trying to install the new extension too early. If the extension needs to make any database changes, triggering the installation too early could miss some database changes and create errors which are difficult to fix later on.

Magento Admin Panel Global Record Search Logged in as kristof | Friday, February 24, 2012 | [Log Out](#)

Dashboard Sales Catalog Customers Promotions Newsletter CMS Reports **System** [Get help for this page](#)

Cache Storage Management

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected

Cache Type	Description	Associated Tags	Status
☐ Configuration	System(config.xml, local.xml) and modules configuration files(config.xml).	CONFIG	ENABLED
☐ Layouts	Layout building instructions.	LAYOUT_GENERAL_CACHE_TAG	DISABLED
☐ Blocks HTML output	Page blocks HTML.	BLOCK_HTML	DISABLED
☐ Translations	Translation files.	TRANSLATE	DISABLED
☐ Collections Data	Collection data files.	COLLECTION_DATA	DISABLED
☐ EAV types and attributes	Entity types declaration cache.	EAV	DISABLED
☐ Web Services Configuration	Web Services definition files (api.xml).	CONFIG_API	DISABLED

Additional Cache Management

- My Account
- Notifications
- Tools
- Web Services
- Design
- Import/Export
- Manage Currency Rates
- Transactional Emails
- Custom Variables
- Permissions
- Magento Connect
- Cache Management**
- Index Management
- Manage Stores

Flush Magento Cache Flush Cache Storage

Actions Submit

Step 3 - Install the Extension

3.1 Download the extension, either from [your account on our website](#) or via the direct link sent to you in the order confirmation email. Once you have the files on your computer unzip the extension files into a separate folder.

3.2 Upload the extension by uploading the unzipped files to your Magento server via FTP or SFTP (an excellent option is to use the free opensource program [Filezilla](#)). To do this:

1. Connect to the server
2. Navigate to your Magento root folder
3. Upload the previously unzipped files to your root folder by dragging them from your local computer to your Magento root folder

Host: Username: Password: Port: Quickconnect

Response: Current directory is: "/home/magento3"
 Status: Directory listing successful
 Status: Retrieving directory listing...
 Command: ls
 Status: Listing directory /home/magento3

Local site: /Users/admin/Desktop/Fooman Extensions/fooman_speedster-3.0.14/	Remote site: /home/magento3
Filename	Filesize Filetype Last modified Permissions
..	..
app	File folder
lib	File folder
skin	File folder
var	File folder
	BACKUP
	cgi-bin
	fcgi-bin
	FILES
	homes
	logs
	public_html
	skin
	tmp
	.bash_logout

Host: Username: Password: Port: Quickconnect

Status: Retrieving directory listing...
 Command: pwd
 Response: Current directory is: "/home/magento3"
 Status: Directory listing successful

Local site:	Remote site:
C:\Users\admin\Desktop\Fooman Extensions\fooman_speedster-3.0.14\	/home/magento3/public_html

Filename	Filesize	Filetype	Last modified
..			
app		File folder	12/19/2014
lib		File folder	12/19/2014
skin		File folder	12/19/2014
var		File folder	12/19/2014

Filename	Filesize	Filetype	Last modified
..			
app		File folder	12/19/2014 4:3...
downloader		File folder	11/26/2013
errors		File folder	11/26/2013
includes		File folder	11/26/2013
js		File folder	12/18/2014 11:...
lib		File folder	12/11/2014 8:4...
media		File folder	12/11/2014 3:3...
pkginfo		File folder	11/26/2013
shell		File folder	11/26/2013
skin		File folder	12/19/2014 4:3...
var		File folder	12/13/2014 12:...
.htaccess	5,673	HTACCESS...	12/11/2014 3:3...
.htaccess.sample	4,568	SAMPLE File	11/26/2013
api.php	2,834	PHP File	11/26/2013
cron.php	2,831	PHP File	11/26/2013
cron.sh	717	SH File	11/26/2013
favicon.ico	1,150	Icon	11/26/2013

Having issues locating your Magento Root Folder? Check [this FAQ](#).

3.3 Check the file permissions of the newly uploaded files: Files need to be readable by the webserver. Pay particular attention to the user and group of the files, and to the files' read/write permissions. It's not possible to give a generic recommendation for which settings to use because it depends entirely on your individual webserver setup. Compare file permissions of the newly uploaded files and folders against existing files on the server. Alternatively, ask your webhost or server administrator for the best settings to use.

Filename ^	Filetype	Filesize	Last modified	Permissions	Owner/Group
..					
app	Directory	20/02/10		drwxr-x—	apache apache
downloader	Directory	20/02/10		drwxr-x—	apache apache
errors	Directory	20/02/10		drwxr-x—	apache apache
includes	Directory	20/02/10		drwxr-x—	apache apache
js	Directory	20/02/10		drwxr-x—	apache apache
lib	Directory	20/02/10		drwxr-x—	apache apache
media	Directory	14/08/08		drwxr-x—	apache apache
pkginfo	Directory	20/02/10		drwxr-x—	apache apache
shell	Directory	20/02/10		drwxr-x—	apache apache
skin	Directory	20/02/10		drwxr-x—	apache apache
var	Directory	05/09/10		drwxr-x—	apache apache

Selected 1 directory.

The ideal scenario is to give the server the absolute minimum access rights needed to perform a given task. Granting universal read/write/execute (777) permissions can be unsafe and is generally not recommended.

Step 4 - Refresh Magento's Cache

Refreshing the Magento cache allows Magento to register the addition of the new extension

and to run any necessary installation routines. Alternatively, turning off the cache will have the same effect.

The screenshot shows the Magento Admin Panel interface. The top navigation bar includes the Magento logo, a search bar, and the user's login information. The main menu on the left has the 'System' tab selected, which has opened a sub-menu with 'Cache Management' highlighted. The main content area is titled 'Cache Storage Management' and contains a table of cache types. To the right of the table, there are buttons for 'Flush Magento Cache' and 'Flush Cache Storage', and a table of associated tags with their status.

Cache Type	Description
☐ Configuration	System(config.xml, local.xml) and modules configuration files(config.xml).
☐ Layouts	Layout building instructions.
☐ Blocks HTML output	Page blocks HTML.
☐ Translations	Translation files.
☐ Collections Data	Collection data files.
☐ EAV types and attributes	Entity types declaration cache.
☐ Web Services Configuration	Web Services definition files (api.xml).

Associated Tags	Status
CONFIG	ENABLED
LAYOUT_GENERAL_CACHE_TAG	DISABLED
BLOCK_HTML	DISABLED
TRANSLATE	DISABLED
COLLECTION_DATA	DISABLED
EAV	DISABLED
CONFIG_API	DISABLED

Step 5 - Log Out of the Backend and Log Back In

Log out and back into Magento to reload any access rules for the backend and prevent a potential “Access Denied” error on newly added admin areas that you haven’t been granted access to. Logging back in with a full administrator account will grant you the new permissions required.

Check your site to make sure your newly installed extension works as advertised, and the rest of your store still behaves as you would expect (you can use the same [checklist](#) we linked to earlier).

If you took your store offline before installing the extension, [bring it back online](#).

Step 6 - Rerun Magento’s Compilation Process

If you're using Magento’s compilation mode, you need to hit the “Run Compilation Process” button to update the compiled state with the newly installed extension (go to **System > Tools > Compilation**).

The screenshot shows the Magento Admin Panel interface. The top navigation bar includes the Magento logo, a search bar, and the user's login information. The main menu on the left has the 'System' tab selected, which has opened a sub-menu with 'Tools > Compilation' highlighted. The main content area is titled 'Compilation' and contains a section for 'Compilation State' with buttons for 'Run Compilation Process' and 'Run Compilation Process'.

Compilation State	
Compiler Status	Disabled
Compilation State	Not Compiled

Command Line Equivalent:
`php -f shell/compiler.php -- compile`

Installation Complete!

Troubleshooting

If you run into any issues, check out the [Installation Help](#) FAQ.

Uninstall Fooman Connect: Xero

To uninstall Fooman Connect: Xero:

- Delete all downloaded files from your system
- Refresh your Magento cache
- Upload the this file [fooman-connect-remove.php](#) to the Magento root folder. Open the uploaded file in your browser. This file can be deleted afterwards.

“Errors received from Xero: No data has been processed for this endpoint. This endpoint is expecting Invoice data to be specified in the request body.”

Enter your serial number into the Magento backend settings. The serial number can be found in your order confirmation pdf.

Error message: [Order number] Invoice not of valid status for modification

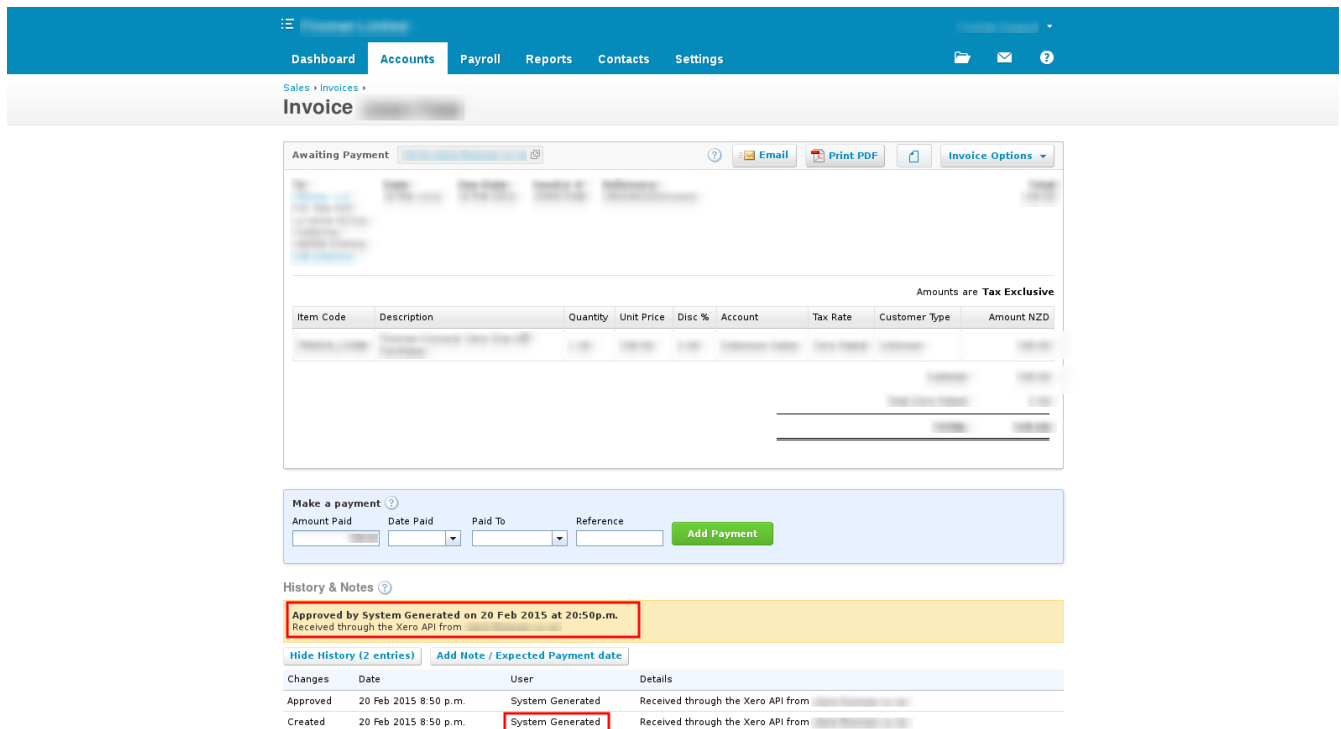
An error message like the below:

```
100001012: Export did not succeed
Errors received from Xero: A validation exception occurred
Invoice not of valid status for modification
```

usually indicates that:

1. Xero already has this invoice number (from Magento or other source) and
2. and a payment has been applied against it.

Any further changes to that invoice are then prevented by Xero with the above error message. We suggest taking a look at the invoice history in Xero (see below) to establish if this invoice had already been exported by our integration, was possibly exported wrongly from a test site (we suggest connecting any test/staging/dev sites to a Xero demo organisation to prevent this from happening) or is genuinely a double up of order numbers.



The screenshot shows the Xero Accounts page with the 'Invoices' tab selected. The main area displays an 'Awaiting Payment' invoice. Below the invoice details, there is a 'Make a payment' section and a 'History & Notes' section. The 'History & Notes' section shows a table of changes:

Changes	Date	User	Details
Approved	20 Feb 2015 8:50 p.m.	System Generated	Received through the Xero API from [redacted]
Created	20 Feb 2015 8:50 p.m.	System Generated	Received through the Xero API from [redacted]

Broken admin order page after installing the extension

If Amasty Order Attachments extension is enabled, please edit
/app/code/local/Amasty/Orderattach/Model/Observer.php

Replace

```
if ($this->_isInstanceOf($block, $this->_orderViewClasses)) {
    $html = $this->_prepareBackendHtml($html);
}
```

with

```
if ($this->_isInstanceOf($block, $this->_orderViewClasses) &&
!($block instanceof Fooman_Connect_Block_Adminhtml_Sales_Order_View_Tab_Xero)) {
    $html = $this->_prepareBackendHtml($html);
}
```

Error Message: The line total does not match the expected line total

It can happen that your Magento store and Xero account don't agree on the same way of dealing with a certain order (mostly tax configuration). We try our best in the integration to level this out sensibly.

To work out why it doesn't like this particular order can you please do the following:

Under **System > Configuration > Fooman Connect** enable logging also enable logging under **System > Configuration > Developer**

Once enabled please go to **Fooman Connect > Xero Orders** manually mark the attempted but failed order and choose 'Export Selected' from the actions dropdown menu.

It will likely not go through - it however creates some additional log entries. Please email us the log from var/log/xero.log so we can take a look into this further.

Automatic Xero export stopped working

Usually this can happen due to any of the two reasons mentioned below:

1. Something in our integration stopped working (stopped subscription, changes in order data coming in - mostly applies to order import from 3rd party marketplaces like ebay and amazon)
2. Our automation is run as part of Magento's other automation which are triggered through a cronjob and this is no longer executing correctly

To rule out 1

- Login to Magento Store Admin
- Navigate to Sales > Fooman Connect - Xero Orders
- Now, select one of the orders that should have exported and then use the action from the dropdown "Export Selected".

If this exports successfully the most likely cause is that your Magento cronjob is no longer executing correctly.

Magento's information on this is [here](#) and if this is not running there would be a few more things that are no longer working (including pricing updates and customer emails).

We suggest you to get in touch with your system admin person or webhosting company to confirm that the Magento cronjob is running successfully. A good way to verify this is to check the database table `cron\_schedule` for updates.

Error message: [Order number]: Order status is not allowed for export - see config

This message indicates that the orders being exported did not match the order statuses chosen in the Export Orders with Status setting. Please re-configure your settings to choose a compatible order status.

Is Fooman Connect: Xero right for my store?

Xero itself is designed to support volumes of up to 1,000 sales invoices and 1,000 purchases/bills per month.

Like Xero, Fooman Connect is optimised for small to medium sized online stores. Transfers from your Magento store to Xero are additionally subject to Xero's limit of 60 requests per minute. As this limit comes from Xero directly, it's not specific to Fooman Connect and also applies to other Magento-Xero integrators.

Is Fooman Connect: Xero suitable for multi store set ups?

Magento multi-stores can be mapped to the same Xero organisation, or to different Xero organisations. Contact us with your requirements and we'll help you get set up.

Are there any known conflicts between Fooman Connect: Xero and other Magento extensions?

There is one small conflict with the Amasty Order Attachments extension - see the workaround in the article below.

There are no other known conflicts.

What additional features from external extensions are integrated?

- **Rentals:** We have recently added support for integrating with SalesIgniter's [Magento rental booking software](#).
- **Surcharges:** Fooman Connect: Xero is compatible with [Fooman Surcharge](#). The surcharge will be carried over to Xero as a separate line item

Reporting Any Issues/Bugs

We are proud of our quality extension code - it's been widely tested and we stand by it 100%. If something does happen and you think you might be experiencing an issue or bug, please contact us via support@fooman.co.nz and we will help you out.