



Connect: Xero for Magento 2

Note: These instructions apply to installing the monthly version of Fooman Connect: Xero downloaded from the Fooman website.

If you want to install the license purchase version of Fooman Connect: Xero, follow [these installation instructions](#).

If you downloaded the extension from the Magento Marketplace, follow [these installation instructions](#).

Option 1: Preferred Installation Method (Fooman-Hosted Repository)

Fooman will host your extension and will automatically push new extension updates to your repository, ready for you to pull/update in the future.

The advantages of this approach are:

- Saves time installing
- Saves time on installing future extension updates (you don't need to manually download these from the Fooman website and repeat the installation process each time)
- Helps to avoid common errors some people make when using the manual installation method
- It integrates better with a multi-stage deployment process

New extension updates will be pushed automatically to this repository for as long as your support/update period is valid.

1. Log into your account on the [Fooman website](#), using your login details you signed up with. On your [My Extensions](#) page you will see a custom command line. Copy the command line:

Magento 2 Extension Installation

Command for setting up Fooman Hosted Installation Method

example.com

Copy and paste the below command and run it from your Magento 2 root directory as the first step of your installation process (all lines are part of the same command):

```
composer config repositories.fooman composer https://customer-repos.fooman.co.nz/example.com-440cc27e232e6490a6ab27d1565928358a40bb9d
```

[VIEW](#)

[COPY](#)

2. From a command line in your Magento root folder run

1. [The custom command line you copied from your Fooman Account dashboard]
2. `composer require fooman/connect-sub-m2:^8.0`
3. `bin/magento module:enable Fooman_ConnectLicenseSub Fooman_Connect`
4. `bin/magento setup:upgrade`

If you are using Production Mode please also run

5. `bin/magento setup:static-content:deploy`
6. `bin/magento setup:di:compile`

In the above example, line 1 would look like this:

1. `composer config repositories.fooman composer https://customer-repos.fooman.co.nz/www.example.com-1a5a588b88a32a6826080639160f1532`

Option 2: Manual Installation Method (Self-Hosted Repository)

1. Unzip the zip file you downloaded from our store into the following folder (please create this folder if it's not already present):

`MAGENTO_ROOT/vendor/fooman/packages`



2. From a command line in your Magento root folder run

1. `composer config repositories.foomanartifacts artifact $(pwd)/vendor/fooman/packages`
2. `composer require fooman/connect-sub-m2:^8.0`
3. `bin/magento module:enable Fooman_ConnectLicenseSub Fooman_Connect`
4. `bin/magento setup:upgrade`

If you are using Production Mode please also run

5. `bin/magento setup:static-content:deploy`
6. `bin/magento setup:di:compile`

Uninstall Fooman Connect: Xero (M2)

From a command line in the Magento root folder run:

```
bin/magento module:disable Fooman_ConnectLicense Fooman_Connect
bin/magento module:uninstall Fooman_ConnectLicense Fooman_Connect --remove-data
bin/magento setup:upgrade
composer remove --update-with-dependencies fooman/connect-m2
```

or if you are using the monthly service option please run

```
bin/magento module:disable Fooman_ConnectLicenseSub Fooman_Connect
```

```
bin/magento module:uninstall Fooman_ConnectLicense Fooman_Connect --remove-data
bin/magento setup:upgrade
composer remove --update-with-dependencies fooman/connect-sub-m2
```

If you have used the Manual Installation Method (Option 2), then please delete the following files if they exist.

```
rm vendor/fooman/packages/Fooman_ConnectLicense-*.zip
rm vendor/fooman/packages/Fooman_Connect-*.zip
```

Manual Removal of Product Attribute

Please run the following mysql queries (adjust the table names if you are using table prefixes). Please note that if you used the uninstall with `--remove-data` above this is not required.

```
delete from eav_attribute where attribute_code='xero_sales_account_code';
```

Manual removal of all database content (optional)

To manually remove any database entries please run the following mysql queries (adjust the table names if you are using table prefixes). Please note that if you used the uninstall with `--remove-data` above this is not required.

```
SET foreign_key_checks = 0;
DROP TABLE IF EXISTS foomanconnect_creditmemo, foomanconnect_creditmemo_error, foomanconnect_invoice, foomanconnect_invoice_error, foomanconnect_invoiceupdate, foomanconnect_invoiceupdate_log, foomanconnect_item, foomanconnect_item_error, foomanconnect_order, foomanconnect_order_error, foomanconnect_taxrate_link, foomanconnect_tenantid, foomanconnect_token, foomanconnect_tracking_rule;
SET foreign_key_checks = 1;

delete from setup_module where module LIKE 'Fooman_Connect%';
```

Error Message: invalid_grant

The invalid_grant error would come up if Xero is not liking the credentials being used to connect. The most likely explanation is that the token used has expired. The access token to Xero needs to get refreshed every 24 hours. This is usually performed in the background via Magento's cronjob.

The following should get the connection re-established. Please update our extension to the latest version by running

```
bin/magento deploy:mode:set developer (if in production mode)
composer update fooman/* xeroapi/*
bin/magento setup:upgrade
your usual sequence of commands to enable production mode (if started in production mode)
```

for example `bin/magento deploy:mode:set production`

Then head to the Magento admin and click the button
Refresh Xero Token
under Stores > Configuration > Fooman > Xero OAuthv2.0.

This should redirect you to Xero, please click continue until you are back in Magento. You should then see the connection status as connected.

Lastly please check the cronjob for Magento is running regularly.

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.

Connecting a staging / test / dev environment

Our licensing already covers the installation of our integration on any dev/test/staging sites associated with the live url.

The one strong suggestion we do make is that when connecting any test site to Xero to choose a Xero demo organisation (comes with every Xero account) to not mess up your live Xero accounting data. You can set this up under <https://my.xero.com/!xkcD/Dashboard>

My Xero

Hi Kristof, you last logged into [Demo Company \(NZ\)](#) today at 5:28 PM

Organisations

Name *	Last viewed	Access	Subscription
Foومان Demo Company (NZ)		Standard Manage users	Info Upgrade Transfer Premium
Foومان Demo Company (UK)		Adviser Manage users	Info Upgrade Transfer Premium
Foومان Demo Company (US)		Standard Manage users	Info Upgrade Transfer Standard

Run another business?

[Add an organisation](#)

[Try the Demo Company \(NZ\)](#) Have a play, try out new features and get familiar with Xero. [Reset](#) or [Change Country](#)

Once the demo organisation is enabled you can follow our set up guide from [here](#) and select the demo organisation to create API keys for.

Good for 30 days

Please note Xero resets the demo organisation every 30 days after which you would need to reconnect your test site - you can do this by clicking Refresh Xero Token.

Caution

If the test environment was initially copied over from the live environment there is a chance that the tokens from the live site were copied over. Please use the button "Remove Xero Connection" (only on the test site) to remove these fully.

Error Message: Item Code 'X' is not valid

The following error message

```
Error from Xero - A validation exception occurred Item code 'X' is not valid
```

would come up if our integration has previously exported the mentioned item to Xero which was then subsequently deleted manually via Xero's website.

To get the two systems back into sync please perform the following steps in Magento head to **Stores > Configuration > Foومان > Foومان Connect > Xero - General**

and set Enable Reset to Yes and save the configuration

Xero - General

Enabled
[store view] Yes

✓ Connected to Fooman NZ Demo Company

Xero Version
[store view] New Zealand

Use Xero Numbers
[store view] No

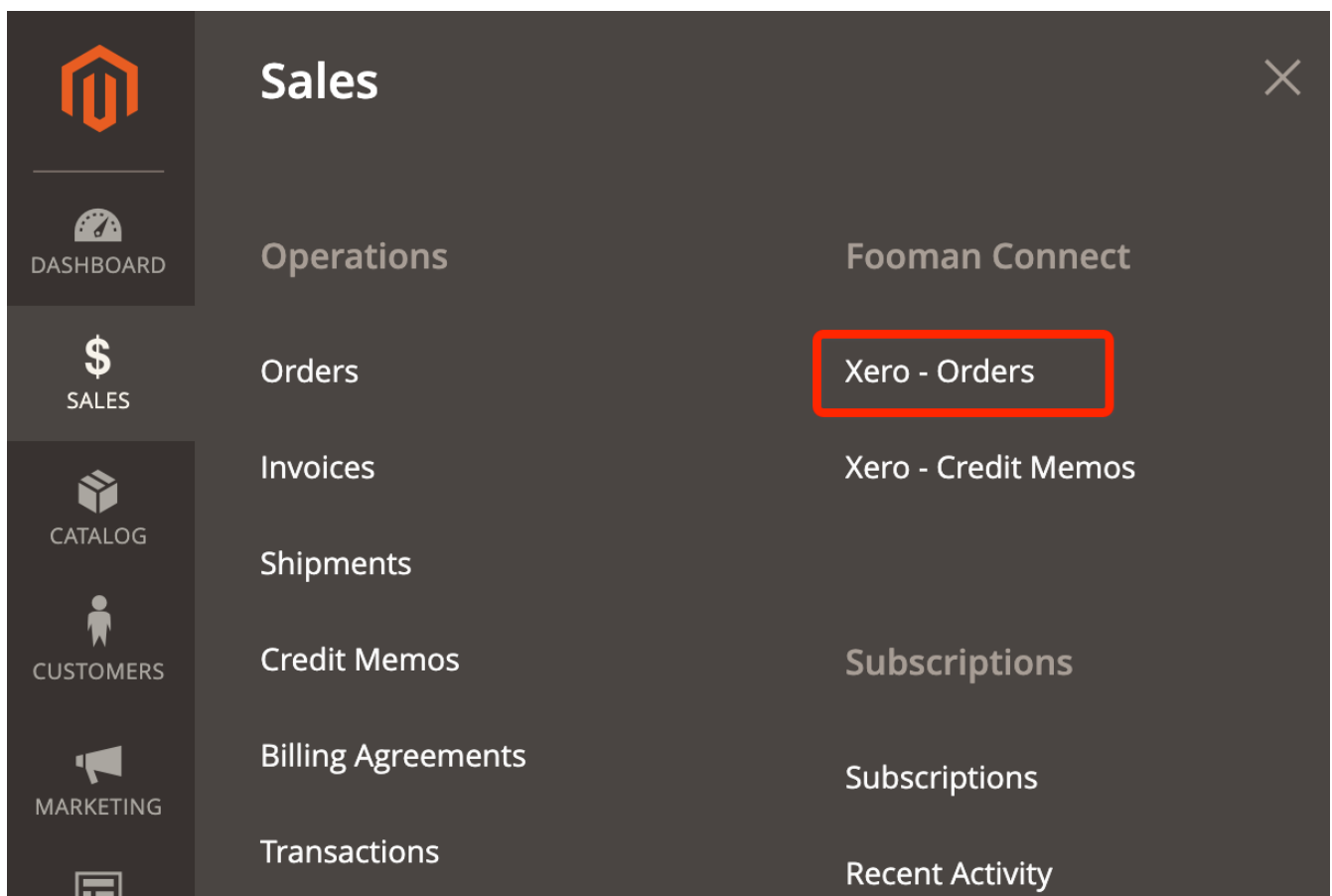
Prefer Company as Contact
[store view] Yes

Transfer Currency
[website] Store Base Currency

Tracking
[store view] None

Enable Reset
[store view] Yes

Next head to **Sales > Fooman Connect > Xero Orders/Invoices**



and click the button **Reset Item Export Status**

[Reset Item Export Status](#)

Filters

Default View ▾

Columns ▾

Any subsequent exports will now no longer be missing the above item.

Troubleshooting Buttons

Troubleshooting

Refresh Xero Token

Remove Xero Connection

Import Xero Payments

Process Xero Payments

Queue Magento Product Export

Refresh Xero Token

The connection to Xero uses secure tokens. These token need to be refreshed every 24 hours. Our integration usually handles this automatically in the background via Magento's cron system. Sometimes, for reasons outside the scope of our integration, this automatic process is not run continuously. This in turn can lead to the connection to Xero requiring a manual re-authorisation. Using the button Refresh Xero Token does exactly that. You may get redirected to Xero to confirm the connection. Please click continue until you are back in Magento and the connection should have gotten re-established.

Remove Xero Connection

This button will completely remove the credentials for the connection to Xero. This is useful if you are looking to switch to a different Xero organisation.

Import Xero Payments / Process Xero Payments

For selected payment methods you can choose to poll Xero to see if the exported invoices have been paid in full. With the setting

Bank Account for Xero Payments set to Don't Create Payment
Create Magento Invoice set to yes

Bank Account for Xero Payments
[store view]

Don't create Payment

?

Adjust Xero Invoice Due Date
[store view]

Payment within 7 days

Create Magento Invoice
[store view]

Yes

Create Magento Invoice on full payment in Xero

Using the button Import Xero Payments will check if previously exported invoices have received a payment. If this is the case subsequently using the Process Xero Payments will create the invoice in Magento for these Xero invoices.

Queue Magento Product Export

Queues all products to be exported to Xero. Please note this button will update the Sales prices in Xero to the current price in Magento. This is different to our standard behaviour to leave pricing information as is.

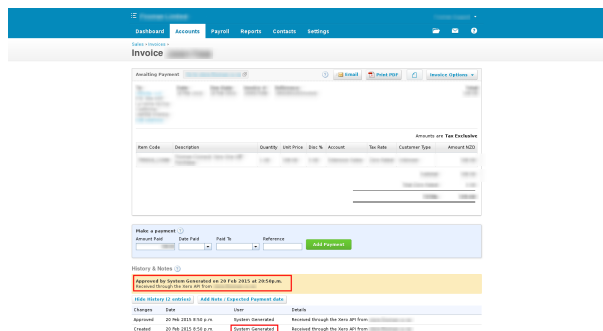
Xero: To update fields on a paid invoice line item, you must supply a LineltemID

100000001: Export did not succeed | Errors received from Xero: A validation exception occurred| To update fields on a paid invoice line item, you must supply a LineltemID| The status AUTHORISED cannot be applied to the invoice because it has payments or credit notes allocated to it.

The error message 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.



If the invoice in Xero matches the one in Xero you can fix up the export status in Magento by selecting the invoices showing Attempted but Failed and using the action "Link Selected".

All other double ups would need to be investigated further to ascertain its origins vs what order numbers your store uses.

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.