This Xero/PPMP integration will allow you to upload your PPMP Payment figures to your Xero account as a Sales entry.

**PLEASE NOTE:**

We highly recommend you have your Accountant to help you set this feature up, or someone in the business that has a very good knowledge of the business accounts and accounting practices. It is also assumed that you have already installed Xero and have set it up with your chart of accounts and Contacts. The Xero/PPMP integration feature is only available in PPMP v9.6.0 and higher. PPMP will NOT rectify or take any responsibility over any errors or mistakes that may occur due to a lack of understanding of your Businesses Xero accounts and accounting practice. Also, PPMP is not an Accounting business and DOES NOT offer any accounting advice.

To setup the Xero/PPMP integration feature please follow the steps below:

1. You need to setup PPMP to connect to Xero, but first there is a little bit of setup that needs to be done in Xero itself.
   To do this you need to go to the Xero Add an Application web page found at: [https://app.xero.com/Application/Add](https://app.xero.com/Application/Add). Once you click this link, if you’re not logged into Xero already, it will then open the Xero login page for you to login to your Xero account. Once logged in, the Add an Application screen appears. Then follow the steps on the illustration below to fill out this screen:
2. Once the save is complete you will be presented with your application details in the Edit Application screen. Click Save to update your application details under the name of PPMP and then click both Show buttons to reveal the full API & Password (Xero calls it the Consumer Secret) keys, because you will need to copy these Key’s into PPMP shortly. Please leave this Edit Application browser screen open until the entire setup is completed.

Please Note: This information is now saved in your Xero account and you will not have to enter this again.

Goto PPMP...
3. Now login to PPMP (if you haven’t already) and the first thing to do is activate Xero, to do this go to:

*Main Menu > Setup > Computer Resource Usage*

Then click the **Program Links** tab, the **Activate Xero link** box and then the **OK** button.
4. Open the Xero Interface, this interface can be found here:
Main Menu > Accounts > Transmit Xero Transactions Entry

5. The first screen Step 1 – Calculate Transaction Amount is where you use the filters to extract the appropriate figure from PPMP that you wish to upload to your Xero account. The figure can be based on a Date Range, choose between Payment Types or Treatment Charges and select whether to use the Cash or Accrual accounting practice. Also, there is a Show Advanced Options button that allows you to drill down on your Payment Method, Staff and Treatment Location if you wish to extract a more specific payment figure.

6. Once you have made all your selections, click on the Calculate Amount ==> button. PPMP will then move to the Step 2 – Transmit Transaction screen.
7. When the screen **Step 2 – Transmit Transaction** appears the first thing you need to do is check to see if you have a dollar figure showing at the **Total Transaction Amount** line. If you don’t have a figure showing this means that you haven’t selected your filters in the first screen correctly. If this is the case please click the **<== Back** button to go back to the first screen and try again.

![Setup & Configure Xero/PPMP Integration](image)

8. Now you have a figure showing it’s time to make the connection between PPMP and Xero. First you need to copy the **API & Password (Consumer Secret)** Key’s you generated earlier in Xero (Edit Application browser screen) to the corresponding PPMP fields, then enter the **Xero Certificate Password** and locate the **Xero Certificate Path** to associate the certificate file itself. Follow the steps in the illustration below. Once this is done click on the **Load/Refresh Lists** button.

![Setup & Configure Xero/PPMP Integration](image)

9. Next you need to enter your **Xero Transaction Details**. Start by selecting your **Xero Bank Account**. Then type in your **Xero Transaction Reference** text this will show up in Xero, select a **Xero Contact** (we suggest a generic contact name be setup in Xero, such as PPMP), select whether GST (Sales Tax) applies to this figure under **Xero Amounts Are**, select the **Account #** you wish your PPMP payment figure to be recorded in and then type in a **Description**.

![Setup & Configure Xero/PPMP Integration](image)
10. Now that all the Transaction data is entered you can go ahead and click the **Save & Generate Xero Entry** button. It will go ahead and start processing. You will know it has been successful when you see the “...SUCCESSFULLY created” message appear and a Sales Transaction has been created in Xero.

That's it your done!!

**Please Note:** The API and Transaction details you have entered in will be saved in PPMP so you don’t have to enter them in everytime you want to upload a transaction to Xero.

**If You Want To Confirm:**

To check if the transaction went through to Xero, one way to do this is to run a **Sales Transactions** report in Xero.