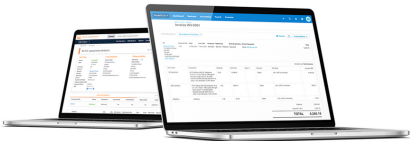




Stock in the Channel

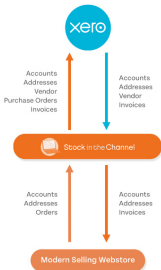
## Integration Guide



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## Data Flow Diagram



### Why use the Xero & Stock in the Channel Integration?

- Purchase Orders and invoices are automatically synced using our EDI order integrations with 20 of the largest IT suppliers.
- Forget endless re-keying and human error, our integration automatically populates data between CRM, PSA and ERP systems.
- Enable your customers to view, query and settle both current and past invoices - all through your web portal.

## Getting Started

To set up the integration with Xero, simply go to:

<https://www.stockinthechannel.co.uk/MySinch/OrderProcess/Integrations/Xero/Setup/Connect>

1

### Xero Integration

**New connection setup**

We're the authorised administrator to connect your Xero account with your Stock in the Channel account.

A new window will open from here, requiring your Xero admin's permission. You will need your Xero admin's unique credentials for the initial authentication. Each individual user will also need to enter their user credentials the first time they use the service.

[Connect to Xero](#)

2




### Log in to Xero

Email address

Password

[Log in](#)

[Forgot password?](#) [Can't log in?](#)



### Stock In The Channel wants access to:


**Organisation data**

**⚠ You have no organisation setup**

To create one, go to your organisation settings.


[Allow access](#)

[Cancel](#)




### Stock In The Channel wants access to:

**Organisation data**

 **MTC**  
View and manage your organisation settings, business transactions, and contacts.

**User account information**

 **Profile Overview**  
View your name, email, and user profile.

By allowing access, you agree to the transfer of your data between Xero and the application in accordance with Xero's [Terms of Use](#) and the application provider in terms of use and privacy policy.

You can disconnect at any time by going to [Connected apps](#) in your Xero settings.

[Allow access](#)

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### Xero Integration

**Connection successful**

Please allow administrator access to your Xero data.

**Account Configuration**

Name:

Base:

Organisation:

Default Purchase Account Code:

Default Purchase Order Account Code:

Default Purchase Billing Terms:

Default Purchase Order Billing Terms:

Area Approval Method:

Area Approval Purchase Order:

Invoice Tax Code:

Purchase Order Tax Code:

**Product**

Export products/destinations:

**Accounts Contact Address**

Export Accounts Contacts:

Import Accounts Contacts:

**Order**

Export POs:

Export Pending Order Orders:

Export Historical Order Orders:

Import Order Orders:

Import Order Name:

**Purchase Order**

Export POs:

Import Purchase Order Name:

Import Purchase Order:

[Disconnect from Xero](#)

**NB:**

> You will need your Xero admin account login credentials for the initial authentication.

> Each individual user will also need to enter their user credentials the first time they use the service.

## Frequently Asked Questions

### How do I disconnect from Xero?

If you ever want to disconnect your systems, just use the disconnect button on your /integrations/xero page, which will be actioned immediately.

### How do I reconcile sales data synced to Xero?

Sales Orders are created on Stock in the Channel and pushed through to your synced Xero account where an invoice is created. When Sales Orders are then processed on Stock in the Channel, it creates a Purchase Order; again pushed to Xero.

Once this is confirmed the Sales Order is completed with all information available in both systems. Note, if Sales Orders are Edited, a new Sales Order is created (rather than changing the details of an existing Order).

### How and when does sales data sync occur?

Both manual and automatic data sync options are available for users, typically decided by existing sales protocols and processes.

Manual sync follows the steps outlined above, clicking Save at each step to ensure data sync. Automatic sync runs every 15 minutes. If set, all new Order details are pushed to Xero automatically.

### Do I need a Stock in the Channel account?

Yes, you must have an Order Process Account with Stock in the Channel to make Quotes, Sales Orders and Purchase Orders.

### Anything else we can help with?

Xero is one of many Stock in the Channel integrations that support a range of services to help IT resellers. If you've got a solution or a project you'd like to discuss, just drop us a line.

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