

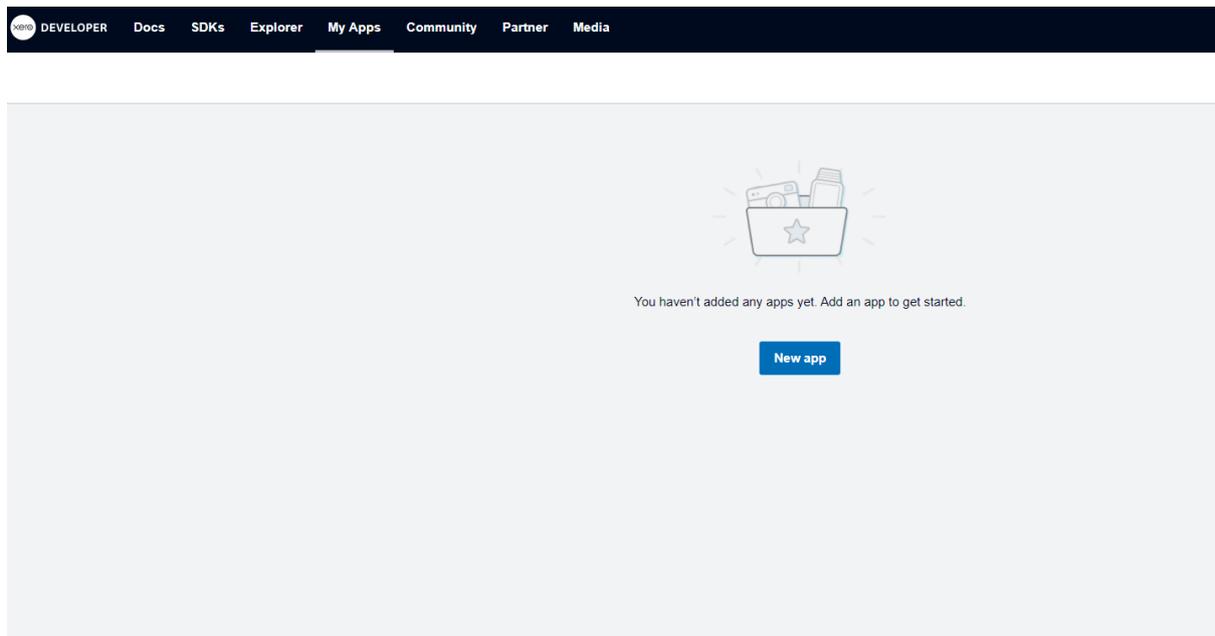
Setup XERO to Mition Integration

You will need to have Admin access to both the Xero and Mition accounts to setup the integration. The basis process is to create a new App in Xero, then connect Mition and matchup the Ledger Accounts. Then turn on the Mition Workflow to send invoices to Xero.

Step 1 : Go to manage your apps in XERO to create a new APP

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

Step 2: Select New App



Step 3: Create a new App called Mition and add your Mition Portal URLs

Instead of Formition.com.au, make sure you use your mition domain.

Application URL : https://[yourmitiondomain]

Redirect URLs : https://[yourmitiondomain]/api/IntegrationBus/Xero_Callback

Add a new app ×

App name

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

Redirect URI

Add more redirects after creating app. [Learn about redirects](#)

I have read and agree to the [Xero Developer Platform Terms & Conditions](#)

Step 3:

Step 4: Go into configuration & copy the Client ID and Generate a Secret

 DEVELOPER Docs SDKs Explorer My Apps Community Partner Media

Apps > Mition (Formition.com)

App details

- App details
- Configuration
- Collaborators
- History
- Webhooks
- App Store application



Take the next

Building your app
100,000+ accounts
and opportunities
3 months for our

You can connect up to 25 organisations to connect

Connection

0 of 25 connections ⓘ

Redirect URIs

[Learn about redirects](#)

[Add another URI](#)

Client id

[Copy](#)

[Generate a secret](#)

Login URL for launcher (optional)

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

Step 5: In your Miton Portal, add your client id, secret, state (e.g. NSW, QLD, or VIC) and any 3 letter prefix you would like to use for these invoices going to your XERO PORTAL.

The image shows a screenshot of the Formition portal interface. At the top left, the logo "formition" is displayed, followed by navigation links: "Home", "About", "Projects", "Help", "Brett", and a "Logoff" button with a user profile icon. A left-hand navigation menu lists various system components, with "Admin settings" and "Integrations" highlighted with orange boxes. The "Admin Settings" page is open, showing a list of settings including Site, Security, Integration Broker, Payment Gateway, Google, Mobile, Email, Invoicing, Members, Tags, Events, Suppliers, Service Desk, Contracts, Workflow, and Integrations. The "Integrations" option is highlighted with an orange box. The "Xero API Settings" page is also visible, showing the "Enabled" toggle set to "ON", and input fields for "Clientid" (628AF2B3FF054C559F2003B54A8D446E), "ClientSecret", "State" (VIC), "settingValue5", and "Xero Invoice Prefix" (FOR). "SAVE" and "VIEW HISTORY" buttons are present at the bottom of the settings form.

Xero API Settings

Settings / Xero

Enabled ON

ClientId

ClientSecret

State

Xero Invoice Prefix

SAVE

VIEW HISTORY

Enable the integration too and **Press SAVE**.

Then press **SETUP AND AUTHENTICATE**

6E

ZI6I_5_5y3XPIUoZM

Configuration

You can add your Xero app by registering your mition site here

See documentation for requiried urls for your domain

Redirect URIs : [https://\[yourmitiondomain\]/api/IntegrationBus/Xe](https://[yourmitiondomain]/api/IntegrationBus/Xe)

Login URL for launcher (optional) : leave blank

TEST XERO **SETUP AND AUTHENTICATE**

This will redirect to XERO and ask you to confirm, make sure you select the XERO System you want to connect to



Mition (Formition.com)
wants access to:

Formition

Organisation data

 **Formition**
View and manage your:

- File library
- Organisation settings
- Attachments
- Business transactions
- Fixed assets
- Contacts

View your:

- Reports
- General ledger

User account information

 **Brett Andrew**
View your name, email, and user profile.

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

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

Allow access

Step 6: Test Xero

You must press the TEST Xero button

Login URL for launcher (optional) : leave blank

TEST XERO

SETUP AND AUTHENTICATE

Select your specific instance and match the GL codes. If you use a GL Code or payment method not mapped, it will not send that invoice to Xero, so setup all the ones you want to use.

For each General Ledger Code, you have to pick a “Sales” account from Xero.

For each Payment Gateway, you have to pick a “Current Asset” account or a “Bank Account” from Xero, if the Asset account you want to use has NULL as the ID, you need to go into Xero and allocate a code for the integration to work.

Chart of Account Matching

General Ledger Codes		
Member Fees (no GST)	204	✎
Member Fees	203	✎
Payment Gateways		
Stripe	611	✎
Bank Tfer	1-1400	✎
Xero		✎

Xero will be added here too automatically when a payment via Xero occurs, there is no need to add a bank account for this, if a payment is made in Xero, your Mitton portal will show that it was paid via Xero.

Example adding a Code to an Account in Xero: You can choose any unique code that makes sense to your company.

Edit Bank Account Details



Your Bank

Commonwealth Bank CBA



Bank feeds are available

Account Name

Business Trans Acct

As you would like it to appear in Xero (limited 150 characters)

Account Type

UNKNOWN

Code

1-1400

A unique code/number for this account (limited to 10 characters)

For the Stripe clearing account:

You can choose any unique code that makes sense to your company.

Edit Account Details

Account Type

Current Asset



Code

A unique code/number for this account (limited to 10 characters)

611

Name

A short title for this account (limited to 150 characters)

Stripe (clearing)

Description (optional)

Final Step, create a workflow in Mition to send data to Xero

Workflow Step

Section	* Invoice 
	This workflow event occurs when an invoice changes.
Workflow Step	* Xero 
	This workflow is available on Invoice changes
Name 	* Xero Invoice
Description	* This integration will ensure all invoices are sent to your Xero integration  
Order	* 1
Deleted	<input type="checkbox"/>