

Connecting Xero Third Party Integration with WorkDash

Follow the instructions below to connect Xero third party integration with WorkDash business management software. There are general steps below which provide the general steps involved with connecting this third-party integration.

To compliment the general steps, there are also detailed step by step instructions. The Xero third party integration with WorkDash will take you approximately 5 minutes to complete. If you have any problems or are unable to connect your Xero account with WorkDash business management software, please contact us at support@workdash.com.au.

We hope you enjoy the seamless integration, automations and efficiencies which you will gain with connecting your Xero accounting package with WorkDash. We are very excited to help your business integrate and grow.

General Steps

Connect to Xero

1. Go to <https://developer.xero.com/>
2. Log in and select “New App” from the top right-hand side of the screen.
3. Fill in new app details using the information provided in the detailed section below.
4. Go to your WorkDash subscription, log in and navigate to the Third Party Integration page under Organisation Settings <https://app.workdash.software/organisation-settings/third-party-integrations>.
5. Enter your Xero App details into the Xero Third Party widget in WorkDash using the detailed instructions below
6. Authenticate your Xero connection with WorkDash and you are ready to go!

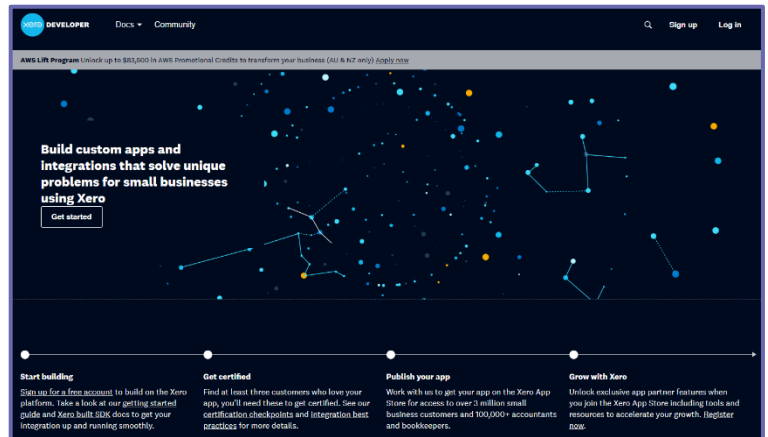


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Detailed Instructions

Create New WorkDash App in Xero

- Go to <https://developer.xero.com/> and login using your normal Xero credentials. The login button is on the top right.
- Log in and select “New App” from the top right-hand side of the screen. 
- Fill in new app details using as per below:
 - Name the App. This can be any name you like but should include some type of reference to WorkDash.
 - Select the Web app option.
 - Add the Company Application URL: <https://workdash.software/>
 - Add the redirect URL: <https://wdservice.workdash.software/api/xero/connect>
 - Agree to the terms and conditions and select Create App.
 - The WorkDash app should now be created, and you can see the app menu on the left and within the App details section you can see the WorkDash name and URL



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App name

WD 3.0

Company or application URL

<https://workdash.software/>

Privacy policy URL (optional)

Terms and conditions URL (optional)

App details

Configuration

Collaborators

History

Webhooks

App Store application

Add a new app 

App name

WD 3.0

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

<https://workdash.software/>

Redirect URI

<https://wdservice.workdash.software/api/xero/con>

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

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

Create app

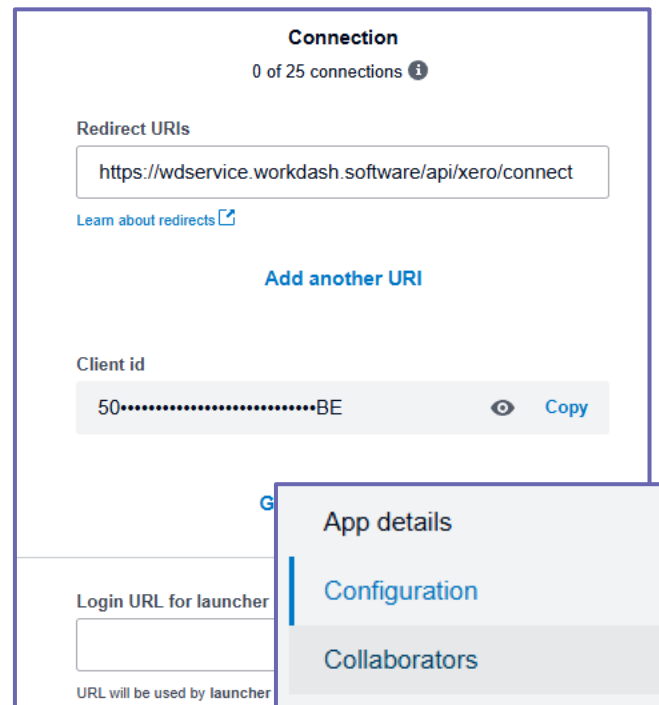
Cancel

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- g. Go to the Configuration section. Here you will see your redirect URI and Client ID. Here you need to generate a Client Secret. Click on “Generate a secret” to generate a client secret which you will later need to connect to WorkDash.

Connect Xero in WorkDash

4. Go to your WorkDash subscription. Log in and navigate to the Third Party Integration page under Organisation Settings
<https://app.workdash.software/organisation-settings/third-party-integrations>.
5. Connect your Xero account to WorkDash.
 - a. Select the cog in the bottom right corner of the Xero widget.
 - b. Copy your Client ID from Xero and paste into WorkDash.
- c. Copy your Client Secret from Xero and paste into WorkDash.
- d. Turn the Status toggle on and submit.
6. You are now ready to authenticate your Xero integration with WorkDash. Select the “Authenticate” button and once successful the Xero Third Party Integration will activate and become active as per the display below.



Connection
0 of 25 connections ⓘ

Redirect URIs

<https://wdservice.workdash.software/api/xero/connect>

[Learn about redirects](#)

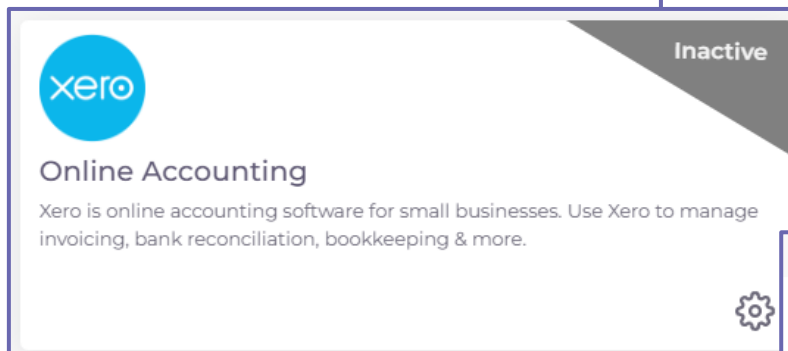
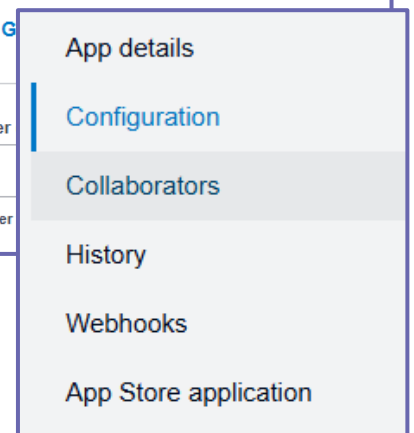
[Add another URI](#)

Client id

50.....BE [Copy](#)

Login URL for launcher

URL will be used by launcher

App details

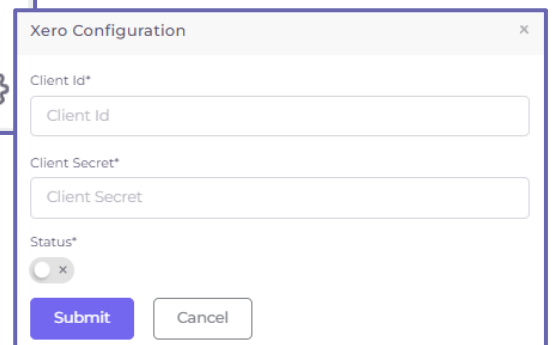
Configuration

Collaborators

History

Webhooks

App Store application



Xero Configuration x

Client Id*

Client Id

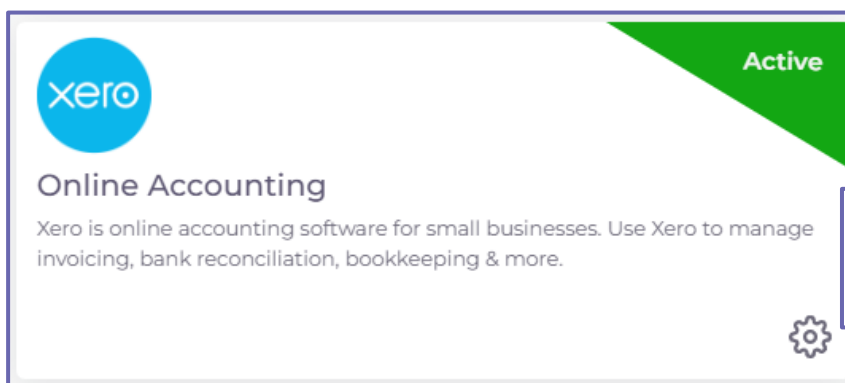
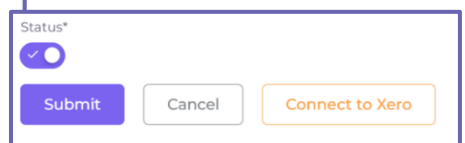
Client Secret*

Client Secret

Status*

☐ x

[Submit](#) [Cancel](#)

Status*

☒

[Submit](#) [Cancel](#) [Connect to Xero](#)

WELL DONE YOU ARE NOW CONNECTED!

Connecting Xero Third Party Integration with WorkDash

Note

To configure Xero in WorkDash properly, please complete the following steps before you start invoicing and managing payments. Also please be aware if you wish to use third party payment gateways such as Stripe in WorkDash you need to also connect this first. Refer to the other WorkDash third party integrations for payment gateways.

Configure Your Xero Account

To configure your Xero account properly you need to set up default account sales and payment codes under organisation settings and apply account codes to all service fees and materials. To begin with we will step through setting up default account codes.

- Now that you have connected your Xero account, log into your WorkDash subscription. Navigate to **Organisation Settings → Global Settings → Costing Settings** tab under global settings. Global settings can be found under your organisation settings.
<https://app.workdash.software/organisation-settings/global-settings/cost>
- Scroll to the bottom of the page to Default Account Codes. Your Xero account codes should now be connected. For the drop down called Account Code (line items) use this drop down to select your default sales account code. This default account code will be used for any service fees or materials (quote and invoice line items) that do not have a specific account code applied.

General Settings

Calendar Settings

Job Settings

Costing Settings

Notifications

Email Settings

SMS Settings

Google API

Templates

Default Account Codes ⓘ

Account Code(Line Items)*

Sales(REVENUE) (200)

Account Code(Payments)*

Westpac Business One(BANK) (100)

- Under Cost Center navigate to your fees or materials in WorkDash. When creating or updating a service fee or material you can apply the relevant account code by using the account code dropdown in the service fee or material profile. Connecting these account codes to service fees and materials will ensure that your invoices will be automatically allocated to the right account codes when synched with Xero.
[Service Fees | WorkDash](#) & [Materials | WorkDash](#)
- When creating quotes and invoices You will now be able to use your service fees and materials in your line items and the relevant account code will be automatically applied. For further information refer to our other guides and tutorials or contact us at support@workdash.com.au.

Service Fee Details ⓘ

Status*
Active

Name*
Audit

Account Code*
BM Consulting(REVENUE) (210.02)

Cost Price*
\$100.00

Margin*
20.00%

Markup*
25.00%

Sell Price*
\$125.00

GST*
\$0.00 0.00% ☒ Tax Exempt

Total (inc GST)*
\$125.00

ITEM	QTY	ACCOUNT CODE	COST PRICE
Business Management Consulting	19.75	210.02	\$80.00