

## XPM Account Re-Authenticating into OnePracticeSync

Please use the steps below to re-register, taking note of the important highlighted items.

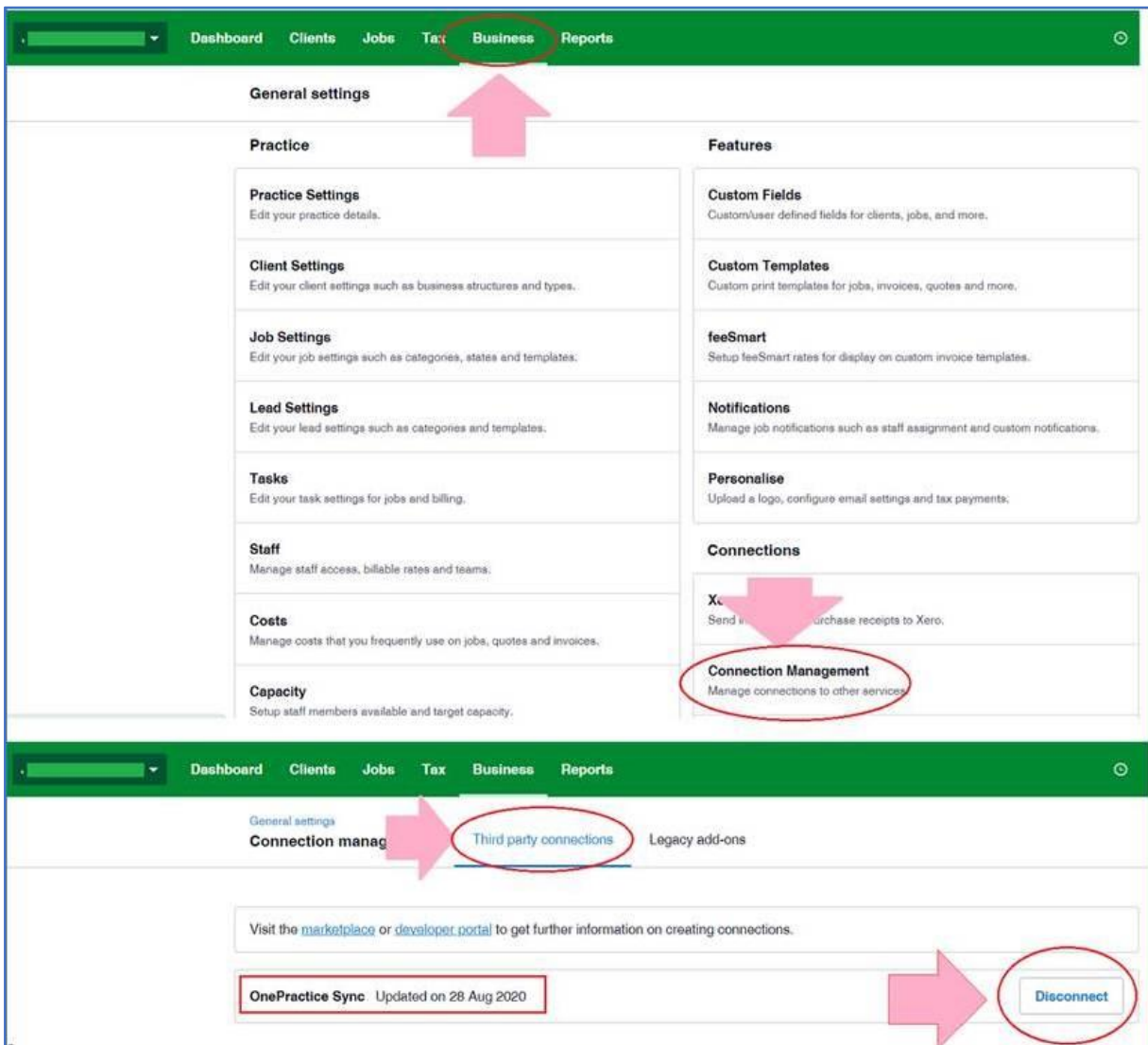
### A. Requirements – please ensure the accounts in M365 and XPM have the following

1. The O365 account has Admin Privileges & a Business Premium or higher license
2. An XPM account that has FULL General / Admin / API Access privileges (XPM > Business > General Settings > Staff)

General Privileges	Admin Privileges	API Access Privileges
Privilege: Full <input checked="" type="checkbox"/>	Privilege: Full <input checked="" type="checkbox"/>	Privilege: Full <input type="checkbox"/>
		Authorise 3rd Party Full Access <input checked="" type="checkbox"/>

### B. Disconnect OnePracticeSync from XPM

1. Open an **incognito/inPrivate** browser window
2. Login to Xero Practice Manager
3. Business (tab) > Connections > Connection Management
4. Third Party Connections (tab) > look for “**OnePractice Sync**” and then click on the **[Disconnect]** button



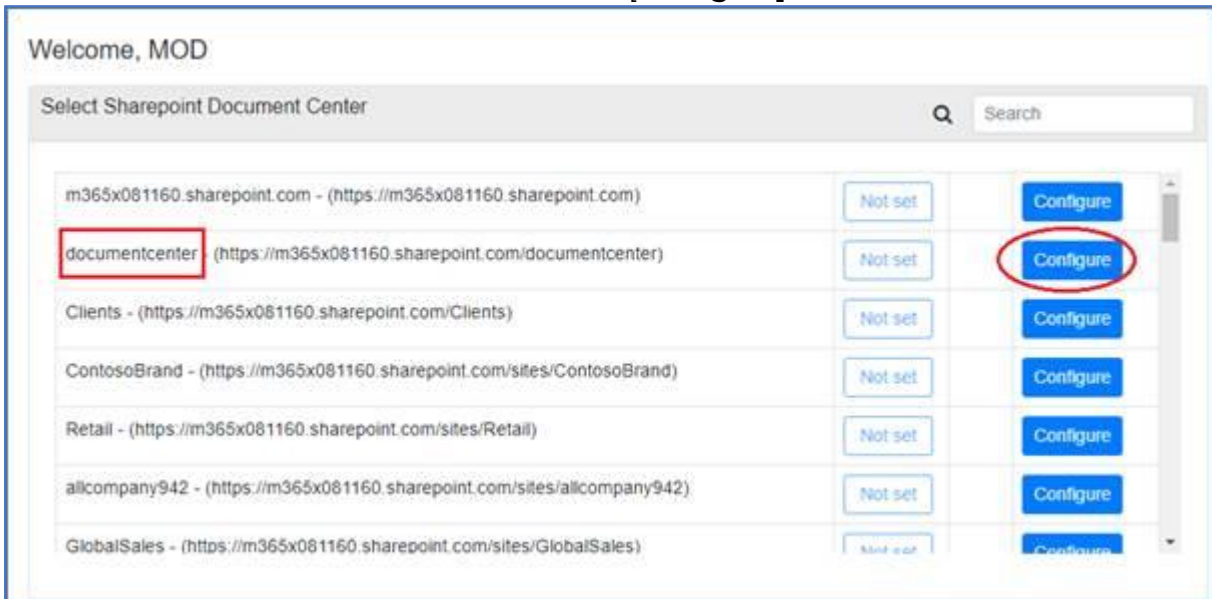
The screenshot shows the Xero Practice Manager interface with the following steps highlighted:

- Step 1:** The 'Business' tab in the top navigation bar is circled in red, with a pink arrow pointing to it.
- Step 2:** The 'Connection Management' section in the 'Connections' area is circled in red, with a pink arrow pointing to it.
- Step 3:** The 'Third party connections' sub-tab is circled in red, with a pink arrow pointing to it.
- Step 4:** The 'OnePractice Sync' entry is circled in red, with a pink arrow pointing to the 'Disconnect' button, which is also circled in red.

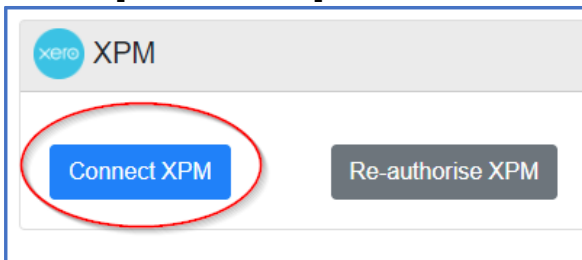
5. **Log out of Xero – IMPORTANT!**

**C. Re-register your XPM-to-HubOne Sync with our OnePracticeSync tool**

1. **In the same incognito/inprivate browser window, open a new TAB**
2. Go to <https://www.tribetech.com.au/ops>
3. Click on **Login with Microsoft** – login with the M365 account
4. Select the correct **Document Center** and click [**Configure**]

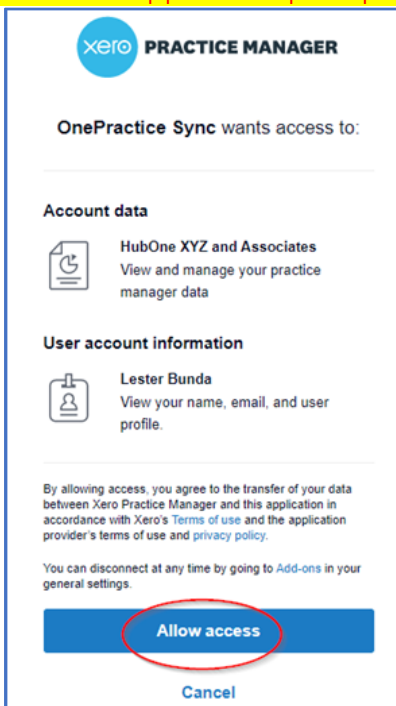


5. Click on [**Connect XPM**]



6. The Xero Login prompt **should** appear (IMPORTANT!) – login to Xero

7. The XPM App Access prompt **should** appear (IMPORTANT!) - select "**Allow access**"



8. The Xero page should close and bring you back to the HubOne OnePracticeSync page, with a drop-down window – **select YOUR XPM Tenancy**



XPM Sync Registration

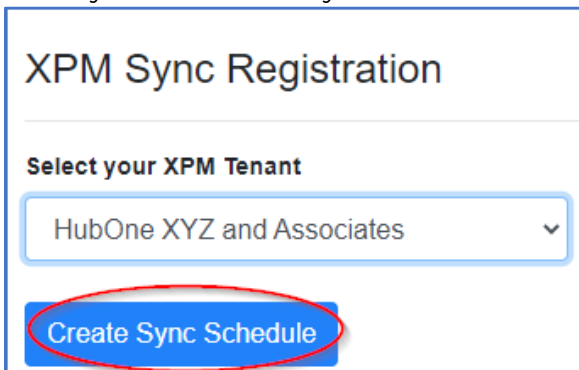
Select your XPM Tenant

--Select Tenant--

--Select Tenant--

HubOne XYZ and Associates

9. Select your Xero Tenancy and a new button should appear – click on “**Create Sync Schedule**”



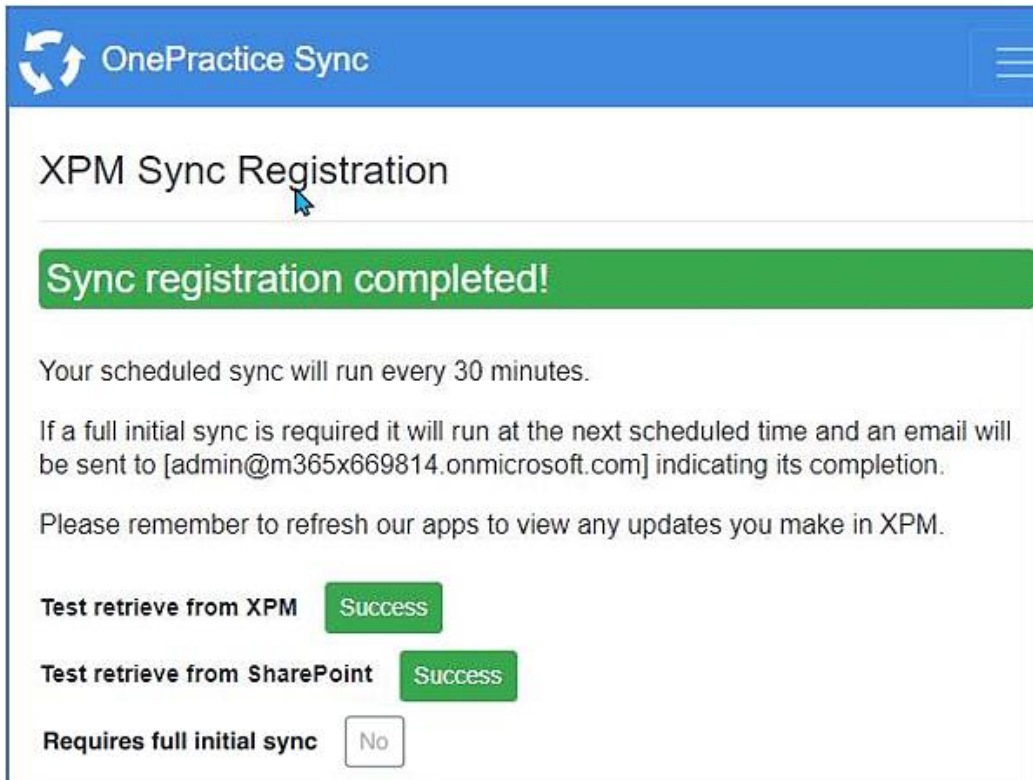
XPM Sync Registration

Select your XPM Tenant

HubOne XYZ and Associates

Create Sync Schedule

10. The system will perform several tests. After which, if all goes well, you should see this at the end. By then, you can close the page.



OnePractice Sync

XPM Sync Registration

Sync registration completed!

Your scheduled sync will run every 30 minutes.

If a full initial sync is required it will run at the next scheduled time and an email will be sent to [admin@m365x669814.onmicrosoft.com] indicating its completion.

Please remember to refresh our apps to view any updates you make in XPM.

Test retrieve from XPM **Success**

Test retrieve from SharePoint **Success**

Requires full initial sync **No**