



## Connecting People to Xero

31<sup>st</sup> October 2016

Xero is online accounting software for small businesses. It helps small businesses in managing invoicing, banking, book keeping and more. Xero connector provides insightful access to your Xero data, giving you the ability to visualize and analyze your Invoices, Payments, Bank balances and other Xero data. It also comes with pre built content to easily analyze your Xero data.

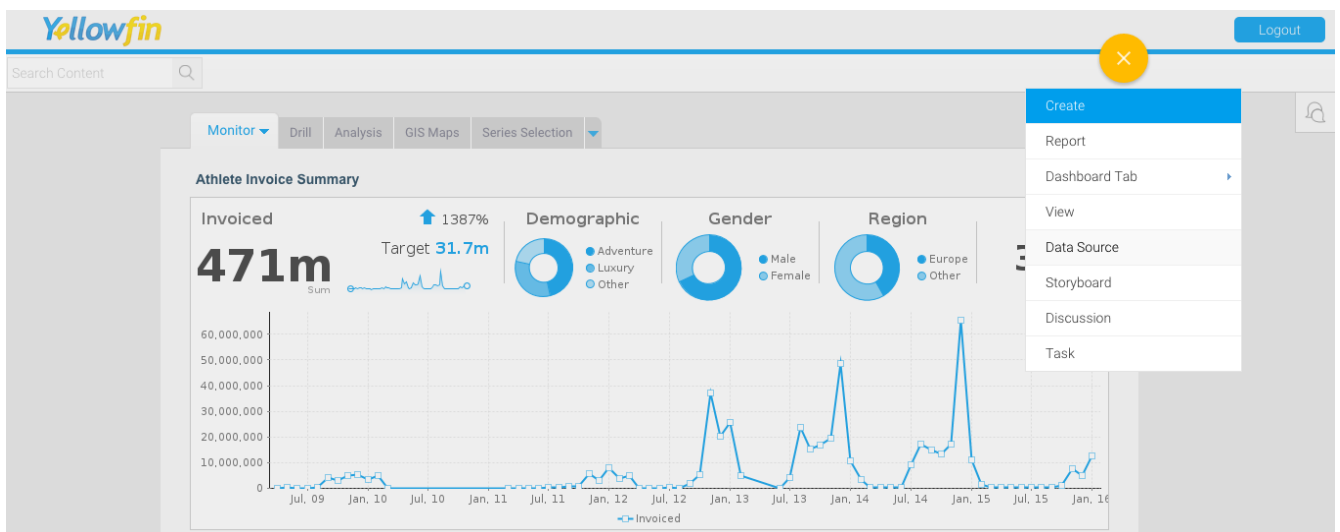
Yellowfin makes connecting to Xero and sharing insights easy:

1. [Install your connector](#)
2. [Connect to your account](#)

## Install your Connector

### Add a New Data Source

- a) Log into your Yellowfin Server  
(The User must have permissions to add a new Data Source)
- b) Click **Create** and select **Data Source**

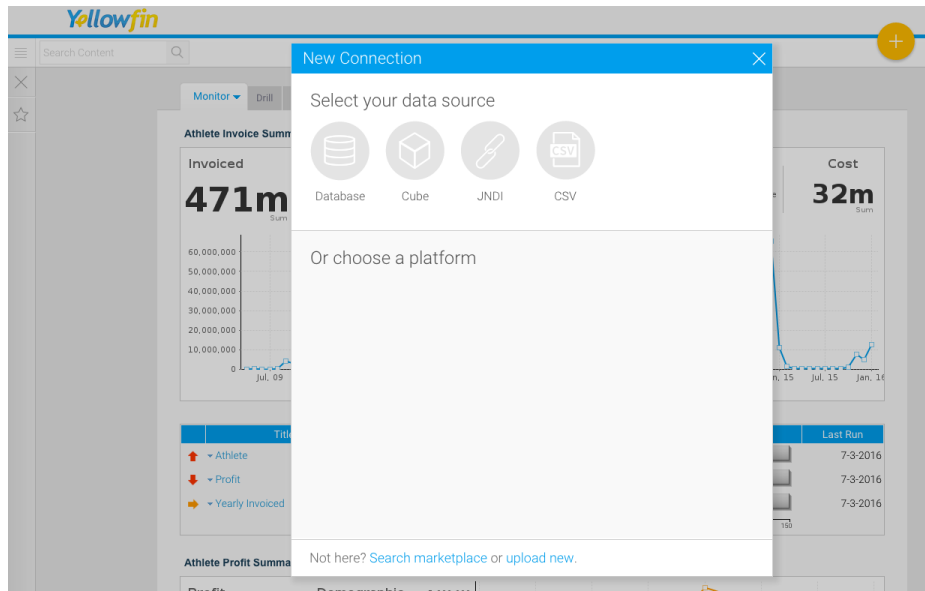


### Upload new connector

If you can see the icon for the Xero Connector at the **New Connection** step, then you can skip to **Connect to your Xero account**. Otherwise you will need to select the **Not here?** links.

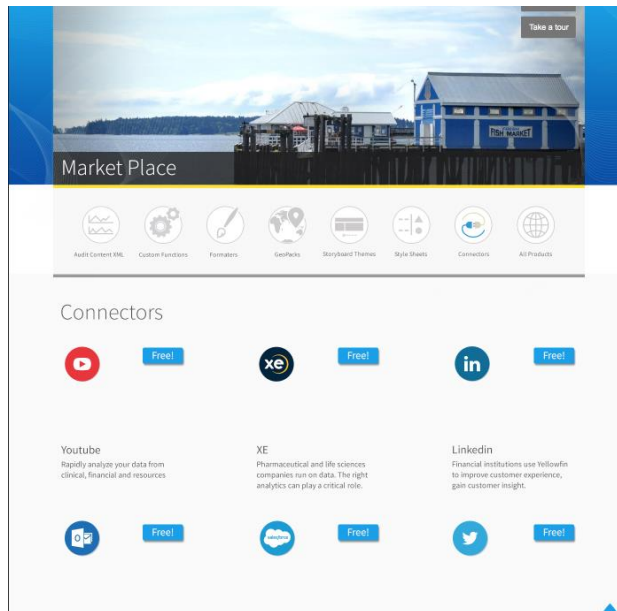
**Search Marketplace** - download your connector from the Yellowfin Marketplace

**Upload New** - upload your connector to your instance of Yellowfin



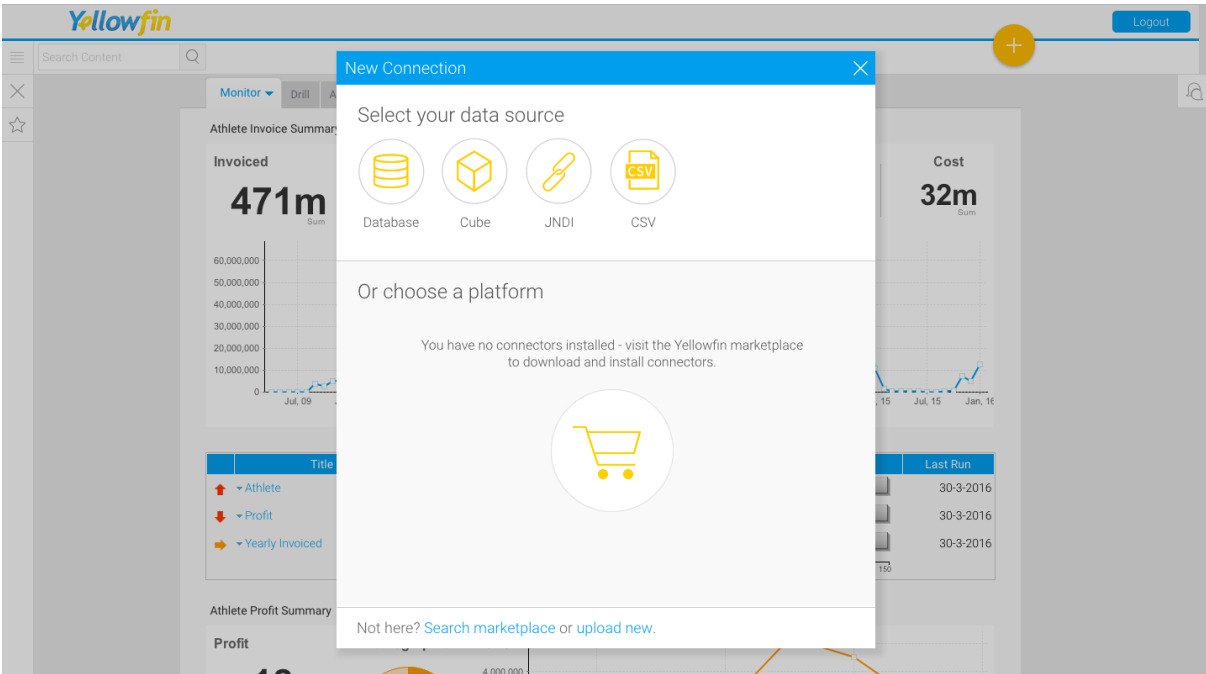
Download the connector from the Yellowfin Marketplace

- c) Go to the [Yellowfin Marketplace](#)
- d) Download the **Xero Connector** (it's free!)



# Upload your new Connector

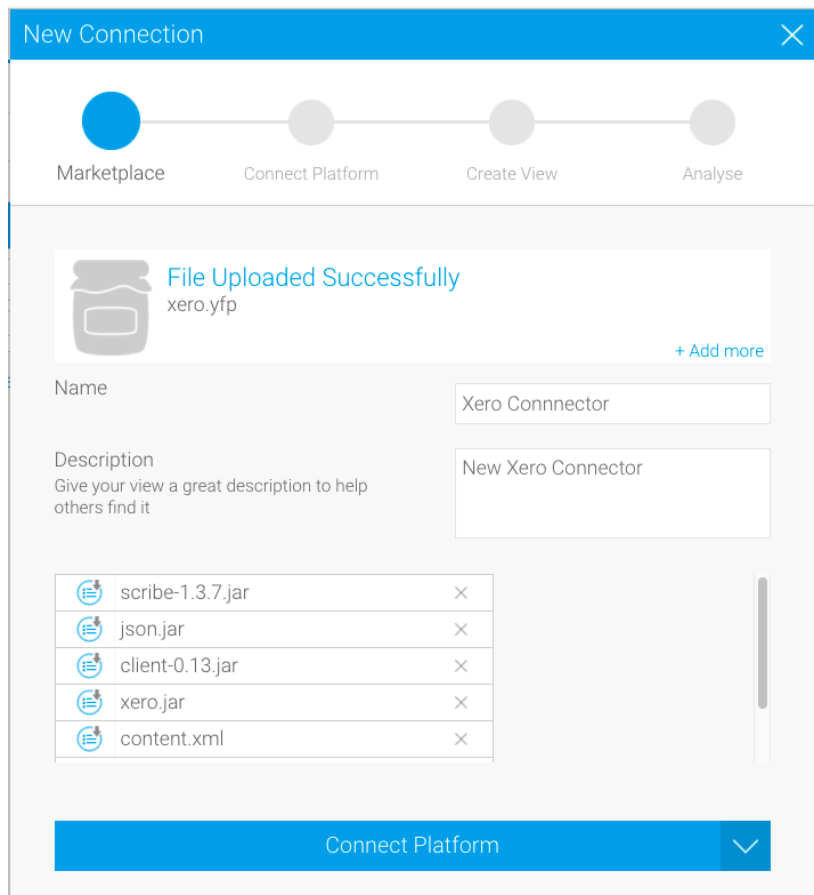
a) Click **Upload New**.



b) Give your connector a **name** and **description**.

c) Click **Connect Platform**.

Your connector will now be available under your **Data Source's** list.



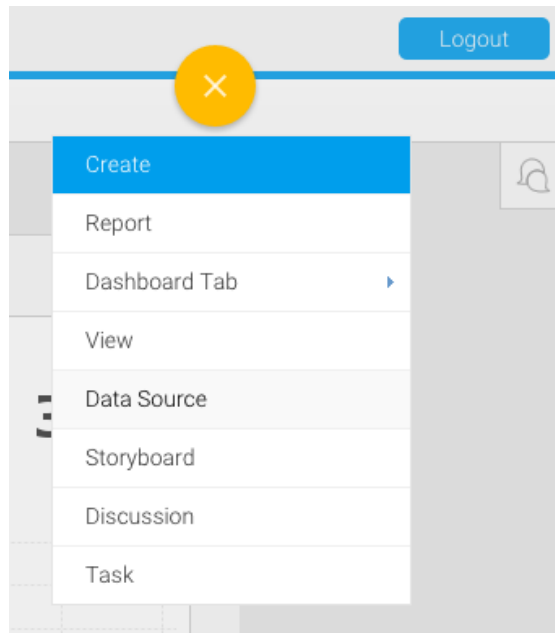
# Connect to your account

Once your Xero Connector is installed, you can use it to connect to your Xero account.

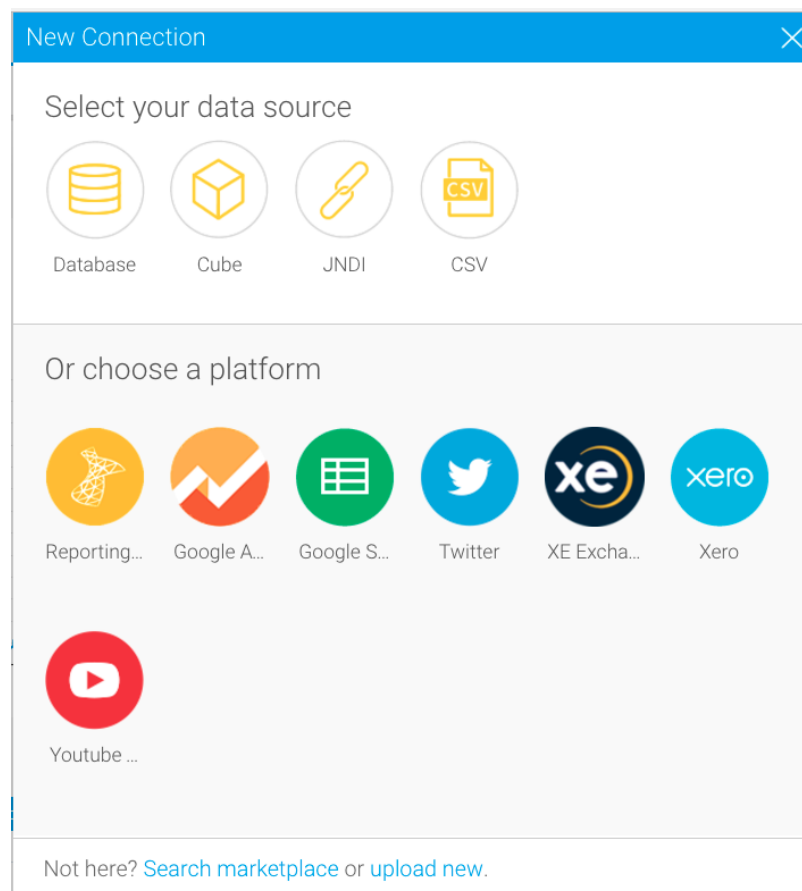
## Create a new Data Source

- a) Click **Create** and select **Data Source**.

(If you have just installed your connector, then you will be immediately taken to the next step)



- b) Select **Xero**



## Name your Connection and Enter your Account Details

- c) Give your connector a **name** and **description**.
- d) Enter your Consumer Key, Consumer Secret. You can generate them from your Xero account using the Upload key specified in the connector.
- e) Click **Launch Pre-Built Content**

The screenshot shows a 'New Connection' window for Xero. It features a progress bar with three steps: 'Connection Sett...', 'Create View', and 'Analyse'. The 'Connection Sett...' step is currently active. Below the progress bar, there are several form fields: 'Name:', 'Description:', 'Consumer Key:', and 'Consumer Secret:'. There is also a 'Go to Xero' button and a 'Launch Pre-Built Content' button at the bottom.

## About Yellowfin

Yellowfin is a global Business Intelligence (BI) and analytics software vendor passionate about making BI easy. Founded in 2003 in response to the complexity and costs associated with implementing and using traditional BI tools, Yellowfin is a highly intuitive 100 percent Web-based reporting and analytics solution. Yellowfin is a leader in mobile, collaborative and embedded BI, as well as Location Intelligence and data visualization.

Over 10,000 organizations, and more than 2 million end-users across 70 different countries, use Yellowfin every day. For more information, visit [www.yellowfinbi.com](http://www.yellowfinbi.com)

### Additional Resources

[Yellowfin Website](#)

[Yellowfin Marketplace](#)

[Yellowfin Wiki](#)

[Support Forum](#)

[YouTube Channel](#)