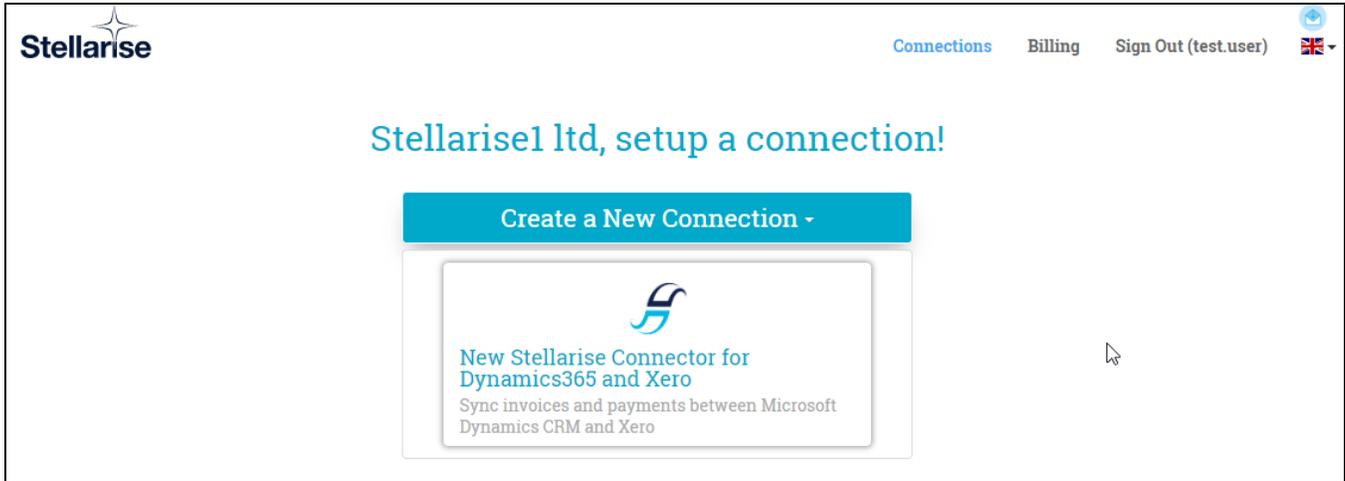


3.5.0 Connect to Xero and Microsoft Dynamics 365

Once you're logged in to <https://connector.stellarise.com/login>, you're ready to connect to Xero and Dynamics.

Create a Connection

From the Stellarise Portal, click on "Create a New Connection". A drop-down menu will show up and you just need to click on the "New Stellarise Connector for Dynamics365 and Xero" badge.



Connect to Xero

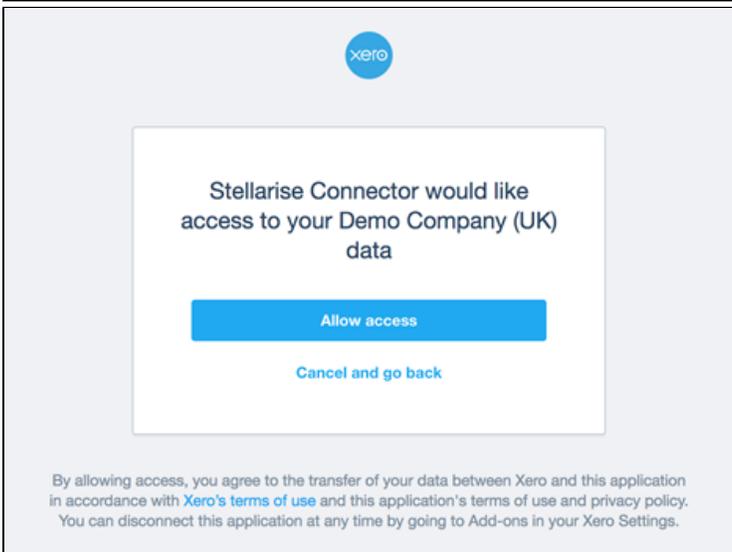
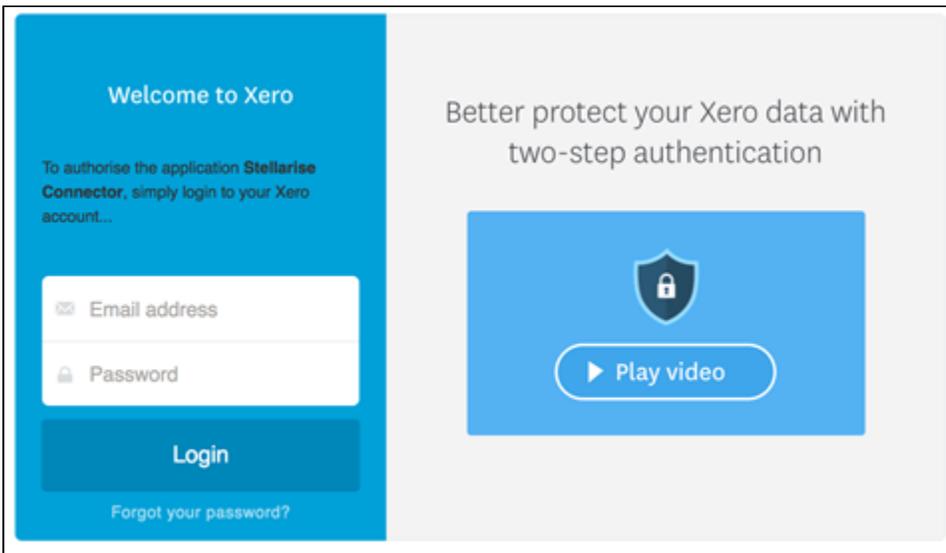
This step allows the Connector to access your Xero information from the selected Xero Organisation.

In the connection page, the first step is to connect to Xero and give permission for the connector to access your Xero Organisation data. The connector **does not** store any financial data coming from your Xero or Dynamics 365 instances, it just syncs this data between the two systems.

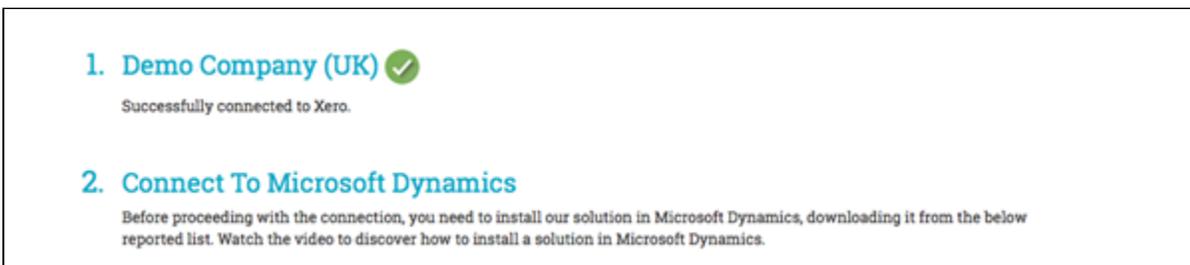
Click on "Connect to Xero" button to allow Stellarise Connector to access your Xero endpoint. You will be taken to the Xero login page, where you have to login to Xero with your credentials.



Once you have logged in, select the Organisation you want to synchronise and click on "Allow access".



Once connected, you will see your **Xero Organisation name** and a green tick instead of the original "Connect to Xero" button.



Install the Stellarise Solution

You need to install the Stellarise Connector managed solution into your Microsoft Dynamics 365 instance. You can do this with these **two equivalent** ways:

From the Microsoft Marketplace

Follow the web user interface offered by Microsoft AppSource to install the solution into your Dynamics 365 instance.

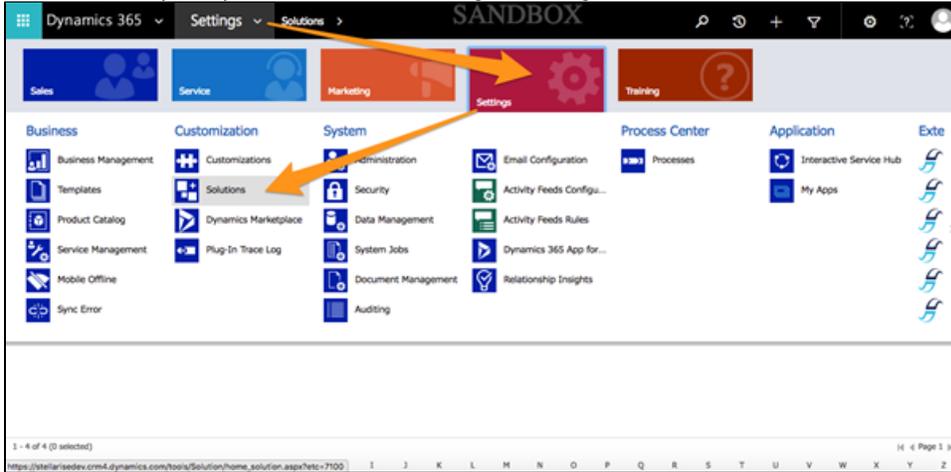
<https://appsource.microsoft.com/en-us/product/dynamics-365/stellarise.dynamics-xero-connector>

Or download and import the zip file

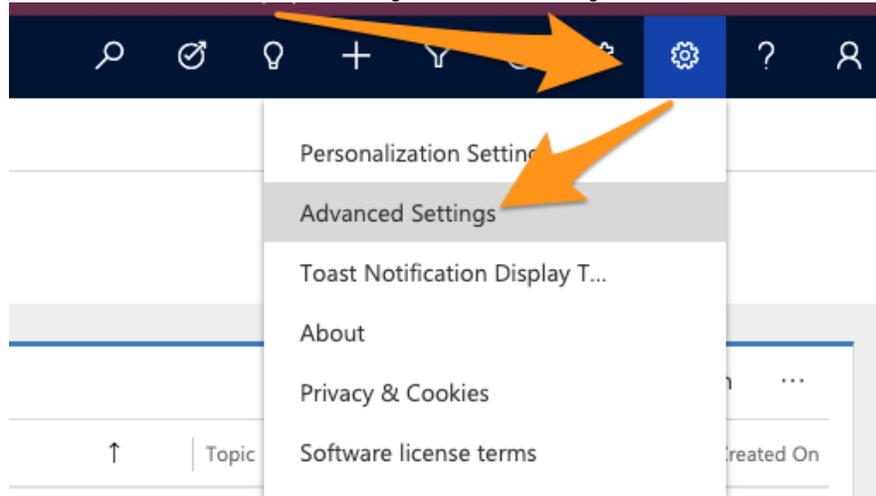
Download and install the Stellarise Solution for Dynamics 365 by following the steps:

1. Download the solution from this link: https://connector.stellarise.com/downloads/StellariseConnectorforDynamics365andXero_3_5_0_managed.zip
2. When you have downloaded this solution, install it into Dynamics 365. Don't unzip the solution prior to installation.

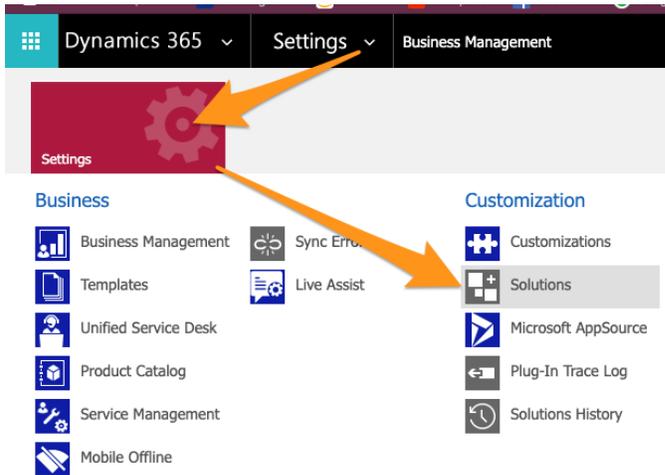
To do this, enter your Dynamics 365 Instance and go to Settings > Solutions as below:



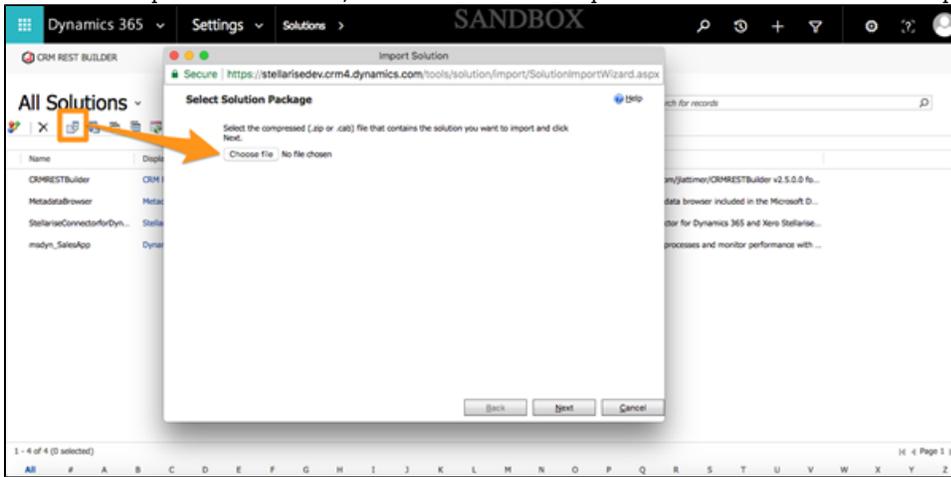
... or in the Unified Interface select Settings > Advanced Settings:



A new window will open with the Settings area. Now you can select the Solutions.



3. Click on the 'import solution' button, select the downloaded .zip file and follow the installation flow provided by Dynamics365.

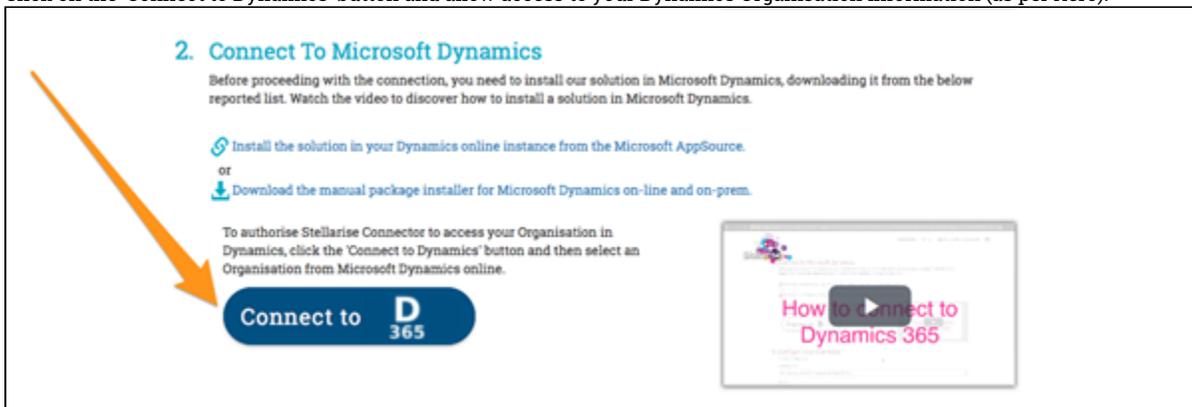


4. Once the Stellarise Solution is installed into your Dynamics 365 instance, go back to the connection details page at <https://connector.stellarise.com>.

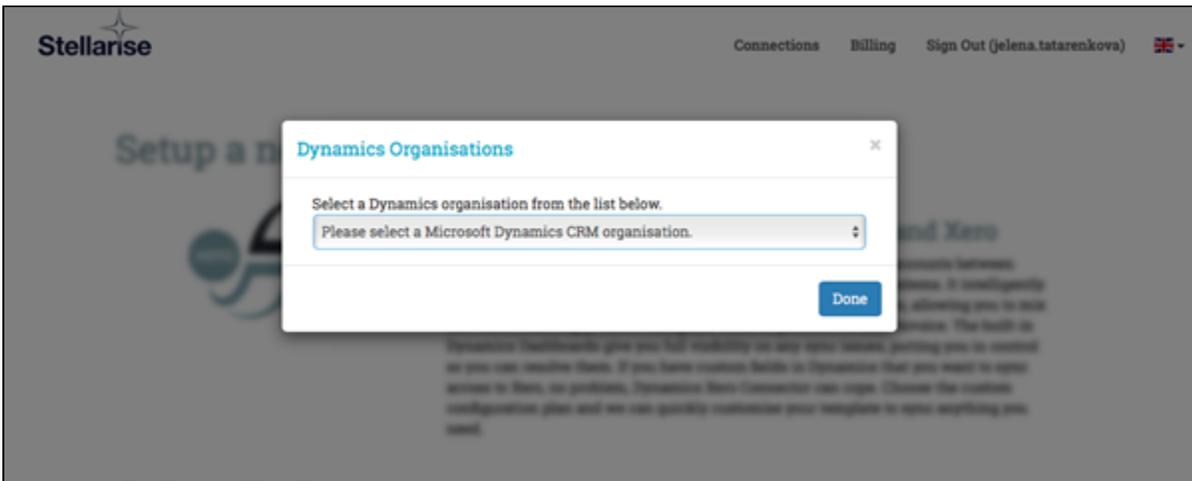
Connect to Dynamics 365

On your connection details page at <https://connector.stellarise.com>...

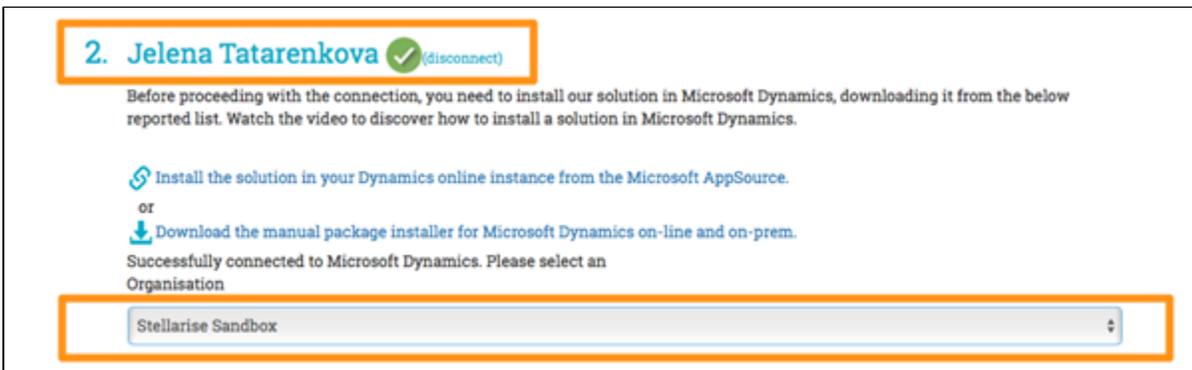
Click on the 'Connect to Dynamics' button and allow access to your Dynamics Organisation information (as per Xero):



Select your Dynamics Organisation from the dropdown list:



Once you have selected the Organisation from a list, if the connection is successful you will have a green tick by it.

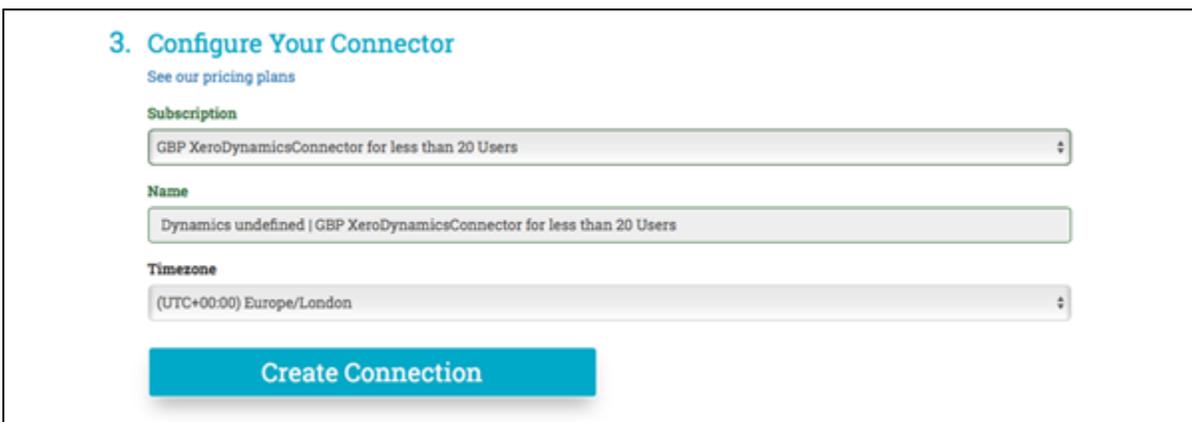


Microsoft Dynamics 365 User Permissions

To be able to use Stellarise Connector for Dynamics 365 and Xero, the Dynamics user you connect with in the above steps **must** have the correct permissions; [3.5.0 What permissions does the Microsoft Dynamics 365 user need?](#) details these.

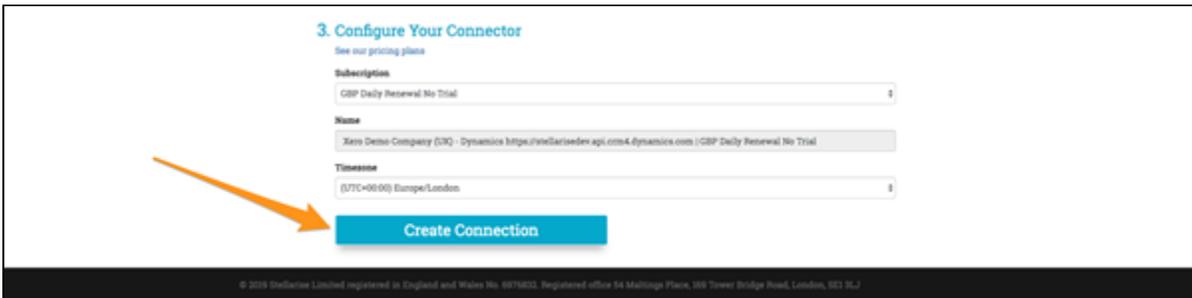
Set the Subscription Type, Connection Name and Timezone

As a last step, set the defaults for the connector's behaviour as below:



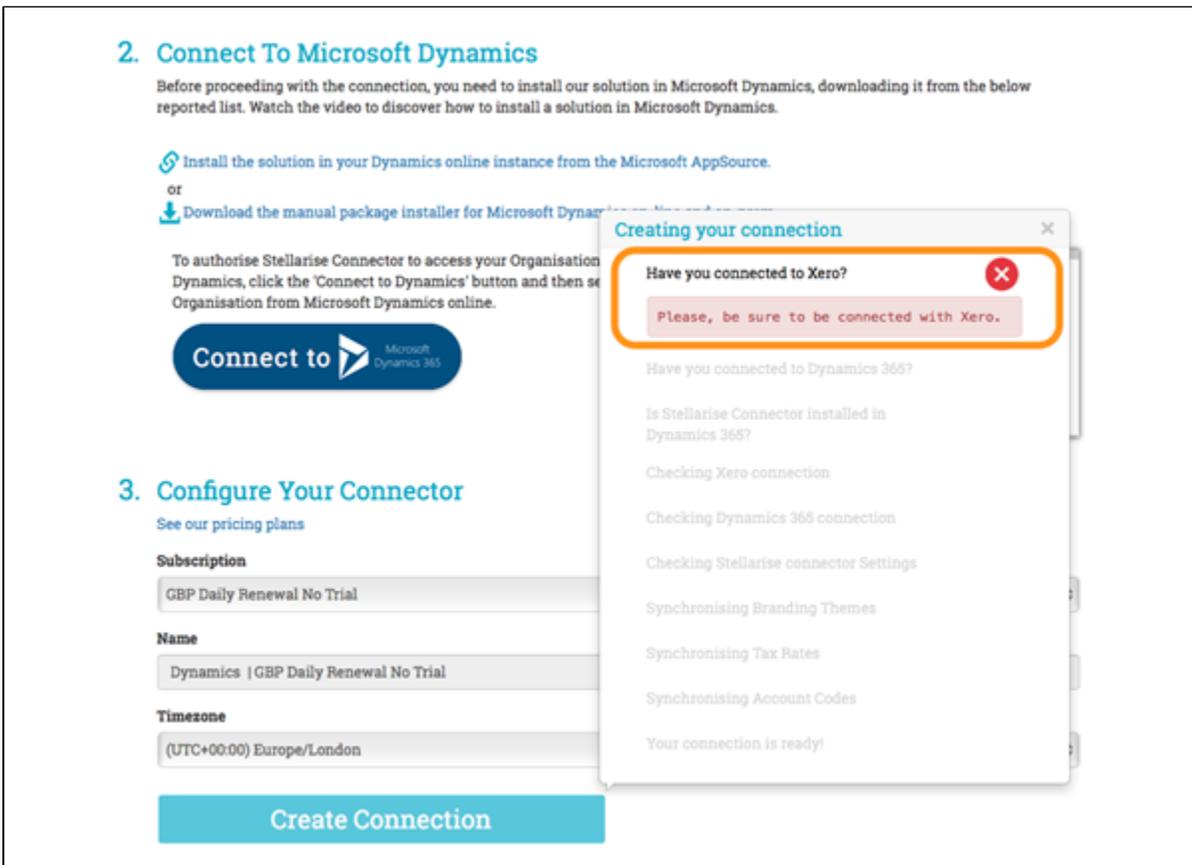
1. **Subscription:** Select the plan you prefer to run your Stellarise connector.
2. **Time zone:** Should be set as the same timezone as your Dynamics 365 and Xero.

And then click "Create Connection" button to set up your connection.



Confirm the connection is working

Once you click **Create Connection**, a checklist appears for each required step. If any actions fail to complete, check the reason given and take steps to fix this.



A green tick confirms each successful step. Once all steps are confirmed your connection is ready.

2. Jelena Tatarenkova (disconnect)

Before proceeding with the connection, you need to install our solution in Microsoft Dynamics, downloading it from the below reported list. Watch the video to discover how to install a solution in Microsoft Dynamics.

-  Install the solution in your Dynamics online instance from the Microsoft Dynamics Store
 - or
 -  Download the manual package installer for Microsoft Dynamics 365
- Successfully connected to Microsoft Dynamics. Please select an Organisation

Stellarise Sandbox

3. Configure Your Connector

See our pricing plans

Subscription

GBP Daily Renewal No Trial

Name

Xero Demo Company (UK) - Dynamics <https://stellarisedev.ap>

Timesone

(UTC+00:00) Europe/London

[Create Connection](#)

Creating your connection

Have you connected to Xero? 

Have you connected to Dynamics 365? 

Is Stellarise Connector installed in Dynamics 365? 

Checking Xero connection 

Checking Dynamics 365 connection 

Checking Stellarise connector Settings 

Synchronising Branding Themes 

Synchronising Tax Rates 

Synchronising Account Codes 

Your connection is ready! 

Click on the following link to be redirected to your Dynamics Settings.

[Stellarise Connector Settings in Dynamics](#)

or

[Back to Home](#)