



Watch sales soar.

Cloud Integration with Skynamo Link

Overview of Integration



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1 Integration overview

Skynamo integrates with your ERP to support Customer, Product, Pricing, Stock Level, and Sales history integration into Skynamo. Skynamo also supports pushing Orders and Quotes from Skynamo into your ERP.



2 Skynamo Link

Skynamo Link can either be an On-prem service or a cloud-based service. We make use of various Plugins to communicate with the various ERPs.

Skynamo Link is used to pull and push data from your ERP, as well as manipulate the data to ensure the two systems maps to one another.

3 Datasets transferred from Xero to Skynamo:

3.1 Customers

- Customer code
- Customer/Company name
- Customer active status
- Contact details
- Notes
- Sales terms
- Shipping address information
- Billing address information
- Notes:
 - Most other data that is available via the Customers API endpoint, can also be integrated into Skynamo.
 - Rows without names & codes are automatically removed.



- Skynamo users can be linked to your ERP customers based on a certain customer field in your ERP (e.g. Sales Rep Code field).
- When a customer is deleted in your ERP, the customer is also removed (set to Inactive) on Skynamo.

3.2 Products

- Code
- Name
- Description
- SKU
- Unit of measure
- Type
- Tax details
- Notes:
 - Most other data that is available via the Customers API endpoint, can also be integrated into Skynamo.

3.3 Pricing

- Multiple Pricelists

3.4 Stock Levels

- Code
- Unit of measure
- Quantity on Hand

3.5 Invoices / Sales History

- Customers
- Product
- Date
- Quantity
- Price
- Reference

4 Datasets transferred from Skynamo to your ERP:

4.1 Orders & Quotes

- Date
- Customer
- User
- Tax information
- Item
- Quantity
- Unit price
- Line amount
- Customer Memo



5 Frequency and data size range:

Full or partial (changes only) snapshot data for the following datasets from your ERP to Skynamo:

- Customers
- Products
- Pricing
- Stock Levels
- Sales History

Pushing of the following datasets from Skynamo to your ERP:

- Orders
- Quotes

The frequency of updates depends on your ERP's constraints. Skynamo's integration systems have very large data processing capabilities and are generally capable of handling any data size/frequency.

6 Setup procedure:

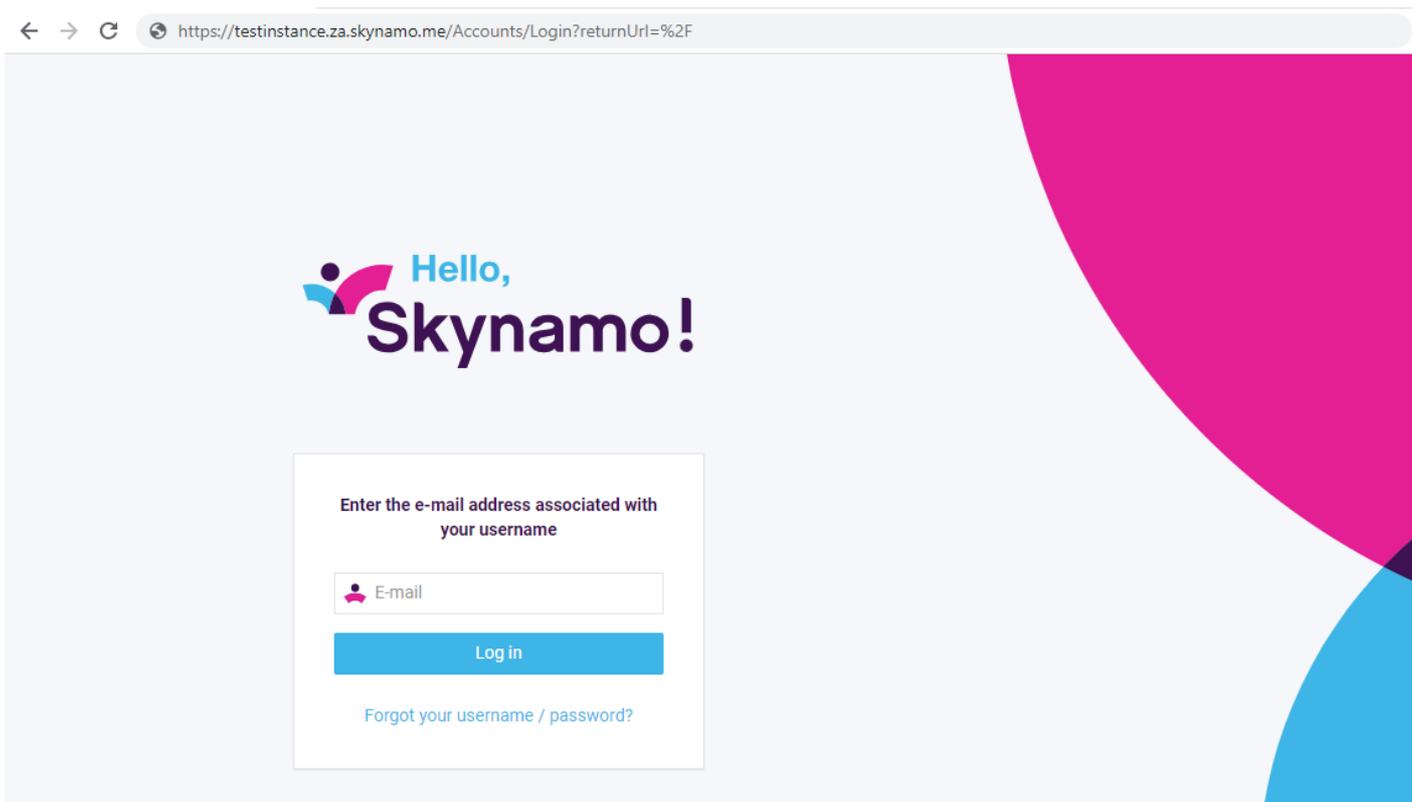
6.1 Requirements

- Skynamo login credentials for a user with Account Manager access
- ERP login credentials for a user with access to authorize new integration connections

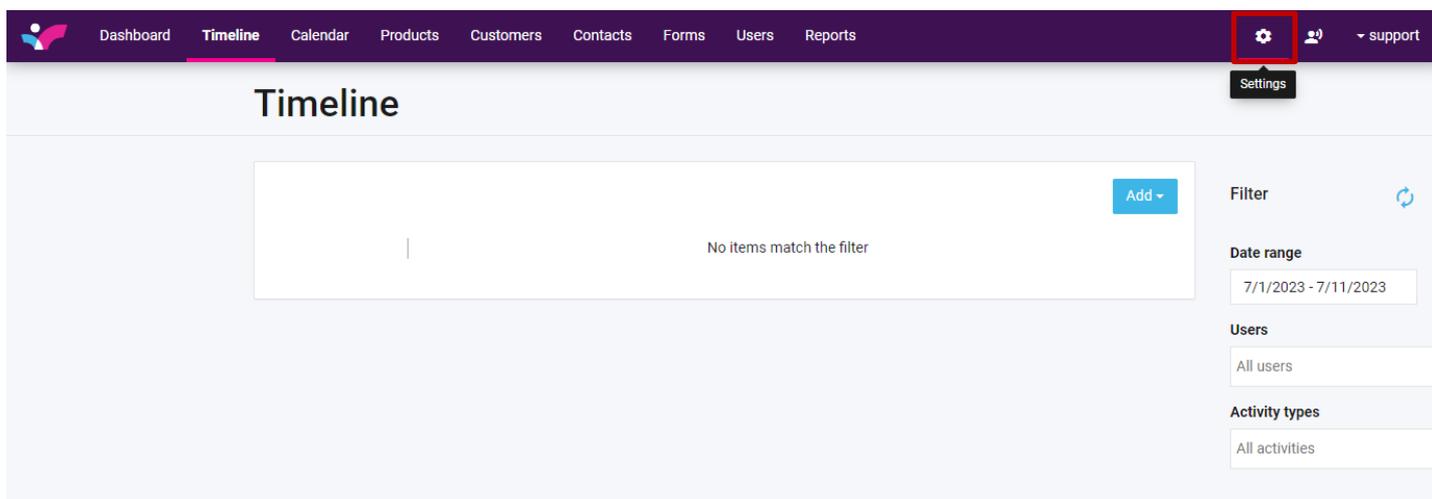


6.2 Steps

- Navigate to your Skynamo instance via any browser and log in with your Skynamo credentials:

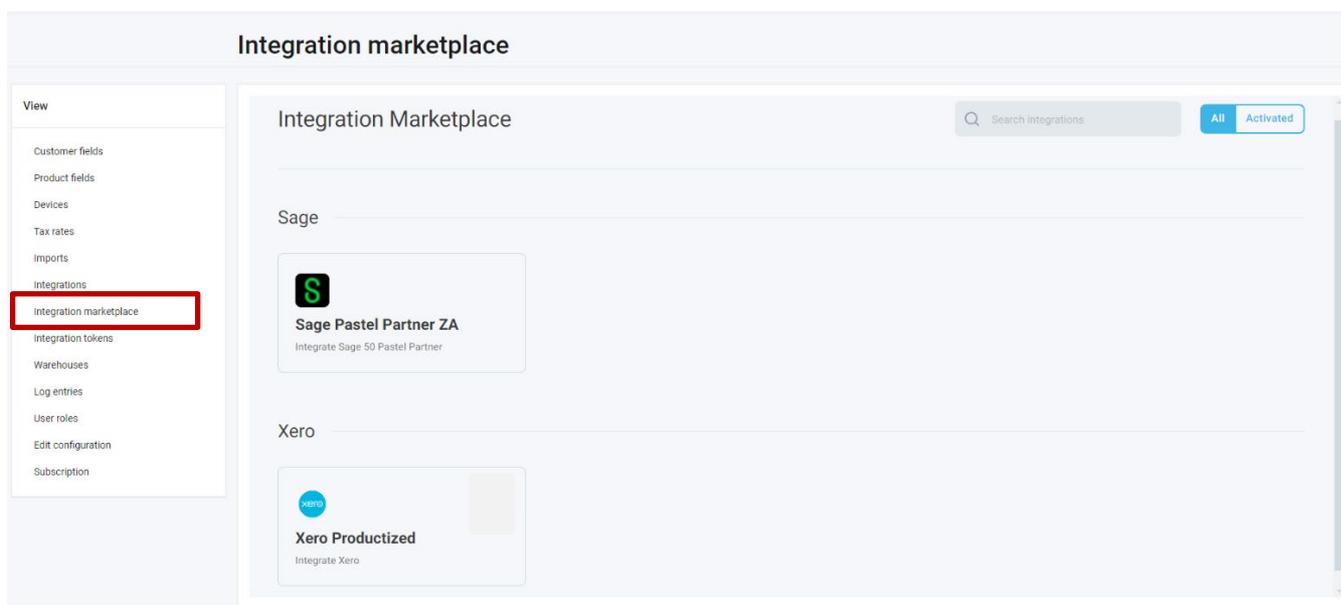


- Once you've successfully logged in, click on the Settings button in the top right corner:

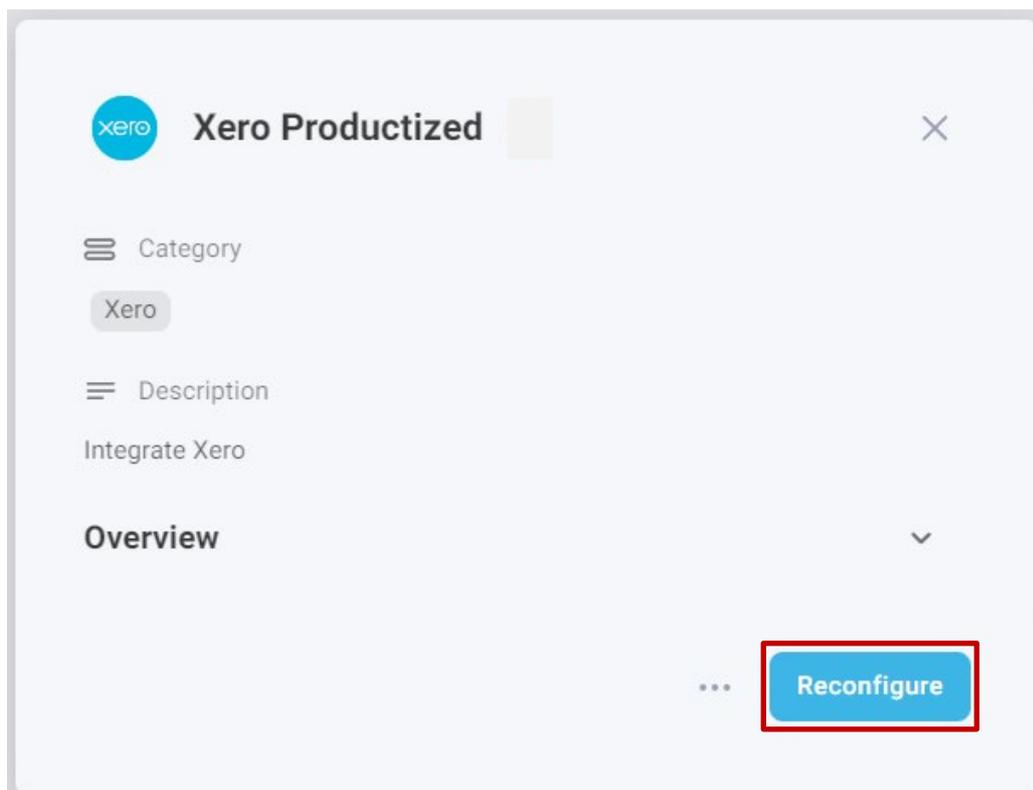




- On the Setting page, click on “Integration marketplace” on the left of the screen. Then, click on the “Xero Productized” button:



- You will then see the following screen pop-up. Here, click on “Reconfigure”:





- On the next screen, simply click “Next”:

Integration marketplace

 **Xero Productized**
Integrate Xero

Xero v30

Name

Xero Productized

Cancel **Next →**

- On the next Screen, enter your exact Xero Company name and then click on “Connect” in the bottom right.

The Skynamo Integration Token would then have to be created and copied from your Integration Tokens as shown further down.



Integration marketplace

Xero Connection

Tenant Name

The name of the tenant you are requesting access to.

Connect

Skynamo Integration Token

API Key

Add your Skynamo Integration Token

[← Previous](#) [Cancel](#) [Next →](#)

Integration tokens

- View
- Customer fields
 - Product fields
 - Devices
 - Tax rates
 - Imports
 - Integrations
 - Integration tokens**
 - Warehouses
 - Log entries
 - User roles
 - Edit configuration
 - Subscription

Integration tokens is a convenient way of getting access to your own data with the Skynamo Public API. Here you can quickly add a new integration token and start using the API right away.

[Add access token](#)

Basil Chocolate migration test	*****Nd	Basil Chocolate migration test	
Created at: 8/23/2023 3:20:09 PM			
Test	*****1c	Test	
Created at: 7/27/2023 4:05:32 PM			



- After clicking on “Connect”, you will be redirected to the Xero login screen (if you aren’t already logged in). Enter your credentials here, to log into Xero:



Log in to Xero

Log in

[Forgot password?](#) [Can't log in?](#)

- After you’ve signed in, you will be prompted to give Skynamo access to your Xero information. On this page, click “Allow access”. You will then see the next message (on the right) which means the authorization was successful and you can now close this tab and navigate back to Skynamo Insights.



Skynamo wants access to:

Organisation data

 **Skynamo Test**
View and manage your:

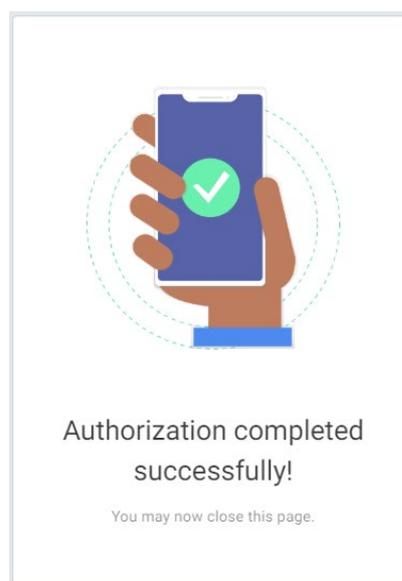
- File library
- Organisation settings
- Attachments
- Business transactions
- Contacts

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

[Cancel](#)





- Back on Skynamo Insights you can now go ahead and choose your Xero tracking category for user assignments:

Integration marketplace

Choose a Xero tracking category used for user assignments

Xero Tracking Category

None

Select the tracking category you would like to use for customer assignments

← Previous Cancel Next →

You will also have the option to configure some of your Customer and Product mapping:

Integration marketplace

Optional Customer Configurations

RepCode UserName Mapping [+ Add to RepCode UserName Mapping](#)

Rep Code	Skynamo Username	
None	Rep1	↑ ↓ 🗑️

Customer Customfield Mapping [+ Add to Customer Customfield Mapping](#)

Source	Destination
No Customer Customfield Mapping have been added.	

← Previous Cancel Next →



Integration marketplace

Optional Product Configurations

Product Customfield Mapping [+ Add to Product Customfield Mapping](#)

Source	Destination
No Product Customfield Mapping have been added.	

[← Previous](#) [Cancel](#) [Next →](#)

Lastly, before clicking on finish you can choose if you prefer to have your order integration active or not.

Integration marketplace

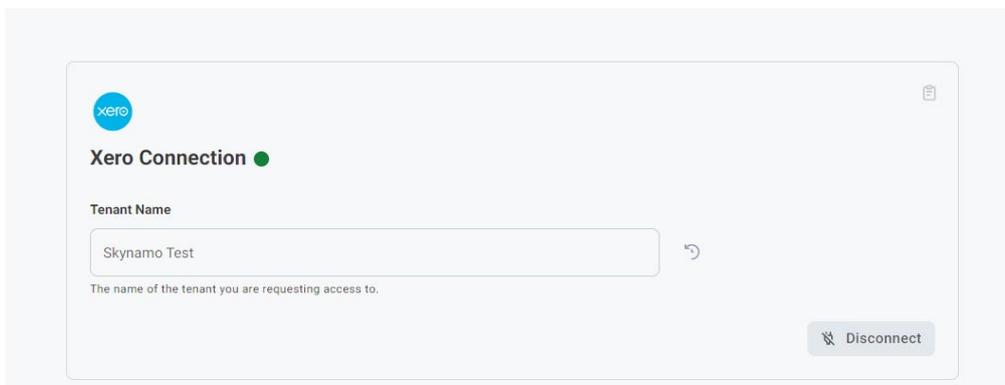
Please indicate whether you prefer the order integration to be active

Order Integration State

Would you like to integrated orders to Xero?

[← Previous](#) [Cancel](#) [Finish](#)

After clicking on “Finish”, you should now see a green dot next to Xero Connection.



Lastly, under the Integrations Tab on the left. Click on “Connect” to the right of the Skynamo Services section, and tick the required boxes below: