



Payrix / Xero Online Invoice Payments

Payrix has simplified the collection of single invoice payments by providing more payment options for your customers and automatically reconciling the invoice in Xero.

When you send your customer an online invoice, our secure payment page gives the customer the option to pay their invoice by bank account, as well as credit or debit card. Customers simply select the preferred option, enter the account or card details and select Process Payment. It is that simple.

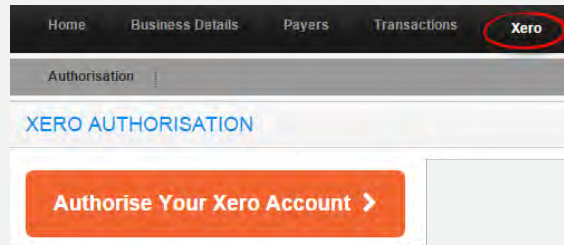
This guide walks you through the simple steps required to start accepting Xero Online Invoice payments via Payrix, which are automatically reconciled back to Xero.

To get started, you should already have an active Payrix account, along with your access details to the Payrix Online Payment Management Console.

PAYRIX CONFIGURATION

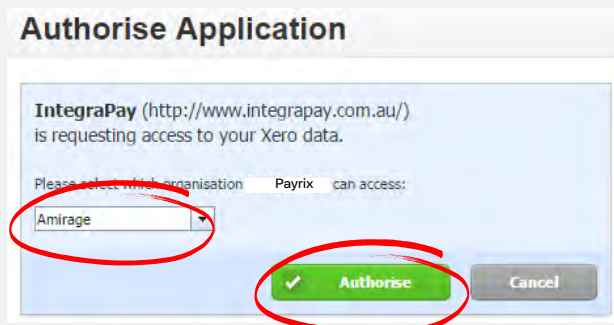
Payrix Configuration

Login into the Payrix Console and select **Xero** in the main menu. Then click **Authorise Your Xero Account**.



The page will divert to the Xero login page. Login to your Xero account as normal

1. Select the appropriate organisation
2. Click **Authorise**.

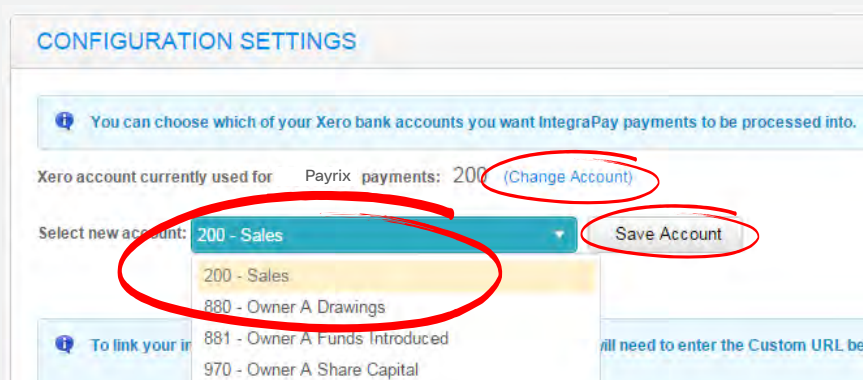


The page will then return to the Xero page within the Payrix console. In the Payrix console under the heading **Configuration Settings**

1. Select the account that you want Payrix payments to be processed into – this list reflects your ‘Xero Chart of

Accounts’ To choose your account

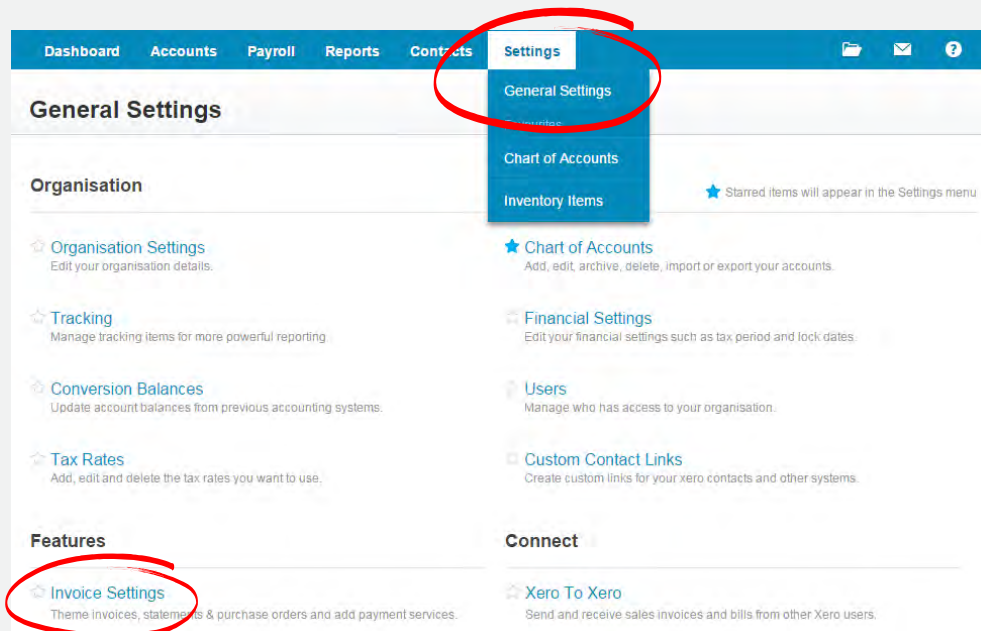
2. Click **Change Account**
3. Select your preferred account
4. Click **Save Account**



PAYRIX CONFIGURATION

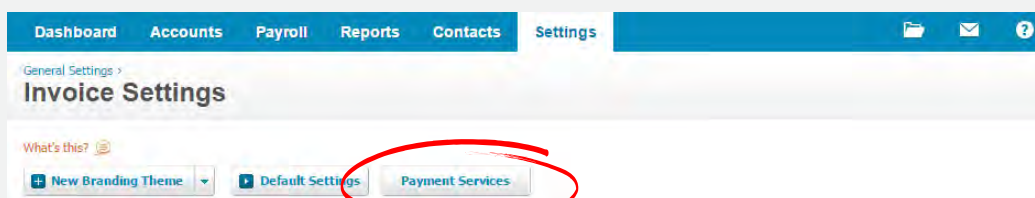
To set Payrix up as a **Payment Service**, open a new browser tab and login to XERO

1. Click on **Settings / General Settings** in the main menu
2. Click on **Invoice Settings**

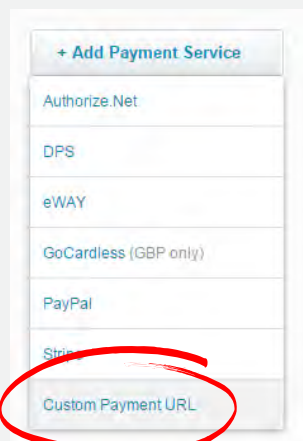


Within the Invoice Settings page

1. Click on the **Payment Services** button



2. Click **+Add Payment Service**
3. Click on **Custom Payment URL** in the menu list



PAYRIX CONFIGURATION

In the Add Custom URL dialog box

1. Type Payrix into the **Name** field

Add Custom URL [X]

A custom URL is designed for payment services that Xero does not officially integrate with. This URL should contain placeholders that will be replaced with relevant invoice data.

These placeholders are [INVOICENUMBER], [CURRENCY], [AMOUNTDUE] & [SHORTCODE]. An example URL might look like:
 https://www.paymentservice.com/?invoiceNo=[INVOICENUMBER]¤cy=[CURRENCY]&amount=[AMOUNTDUE]&shortCode=[SHORTCODE]

Please talk to the payment service providing this functionality regarding what this URL should be.

Name (as you would like it to appear)
 Payrix

Your custom URL
 https://testpayments.Payrix.com.au/RTP/Payment.aspx?b=

Save Cancel

2. Return to the Payrix Console tab
 - a. Navigate to the **Configuration Setting** section
 - b. Copy the Custom URL (it is quite long)

Your custom URL: [https://testpayments.Payrix.com.au/RTP/Payment.aspx?b=0B55D4EB-8CC3-4735-9E4A-DDF0BF01FC97&sft=xero&xero_inv=\[INVOK](https://testpayments.Payrix.com.au/RTP/Payment.aspx?b=0B55D4EB-8CC3-4735-9E4A-DDF0BF01FC97&sft=xero&xero_inv=[INVOK)

3. Return to the Xero tab
 - a. Paste the **Custom URL** from the Payrix Console into the **Your Custom URL** field
4. Click **Save**

Upon save, the **Active Payment Services** page will appear, displaying Payrix as an Active Payment Service.

1. Click **Edit**
2. Click on **Invoice Themes** from the list

The payment service | Payrix has been added. [X]

Active Payment Services

Name	Service	Invoice themes using this service
Payrix		

+ Add Payment Service

Edit ▾
 Service details
 Invoice themes
 Remove...

PAYRIX CONFIGURATION

In the **Apply Service to Invoice Themes** dialog box

1. Select an invoice theme from the list available
2. Click **Save**.

Invoice theme name	Service assigned
<input checked="" type="checkbox"/> Standard	Payrix

If you wish to create additional Invoice Themes

1. Go to **Settings / General Settings / Invoice settings**
2. Click on the **New Branding Theme** drop down menu

Dashboard Accounts Reports Contacts **Settings**

General Settings >
Invoice Settings

Customize invoices to suit your organisation and match your brand
Create [invoice templates](#), add your logo and select which financial information to show
See our [help article](#) to learn more

What's new
New Branding Theme (circled in red)
Standard
Custom
Default Settings Payment Services Invoice Reminders Options

You can access the Active Payment Services page or add a New Branding Theme at any time.

Great! You are now ready to send Xero Online Invoices with Payrix as the payment service.

HOW DO INVOICES AND PAY NOW WORK?

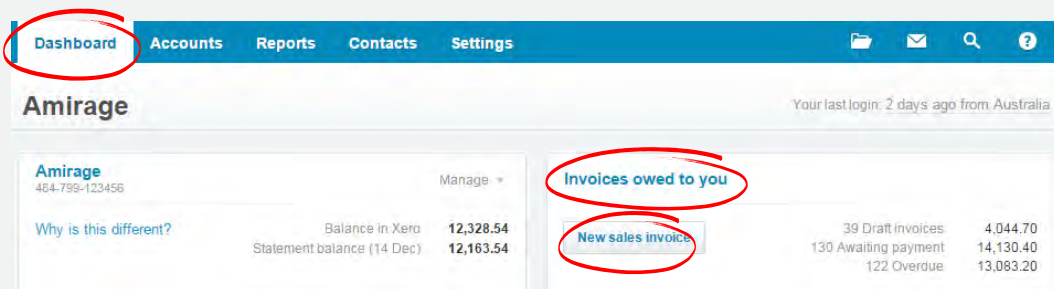
How do Invoices and Pay Now work?

Now that you have completed the setup, you are ready to send Xero online invoices and receive payment via Payrix.

Create a New Invoice

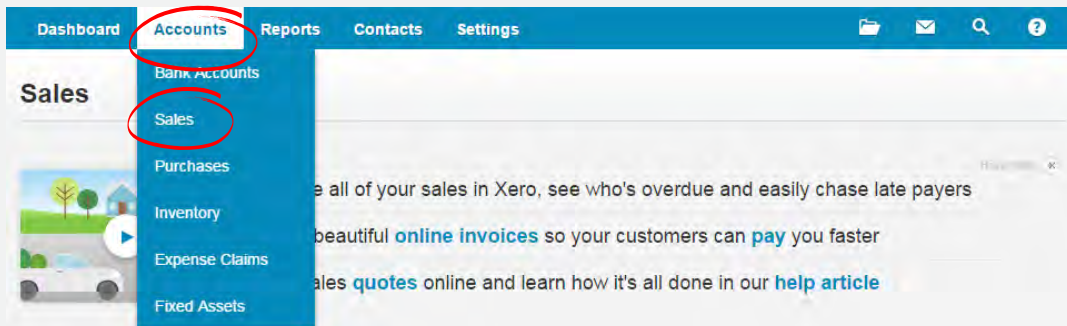
From the **Dashbord** tab

1. Go to **Invoices owed to you**
2. Click **New Sales Invoice**

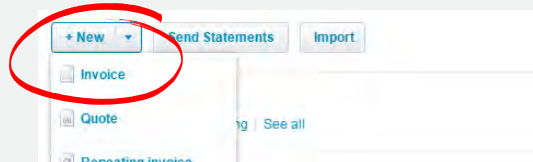


OR from the **Accounts** tab

1. Click **Sales**



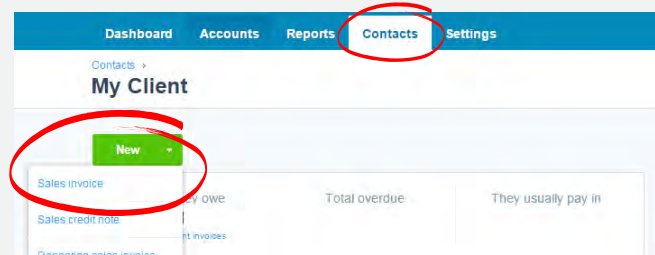
2. Click **+New** drop down menu
3. Click **Invoice**



HOW DO INVOICES AND PAY NOW WORK?

OR from the **Contacts** tab

1. Click on the **Customer** you want to send the invoice to
2. Click on the **New** dropdown menu
3. Click **Sales invoice**



Completing your invoice

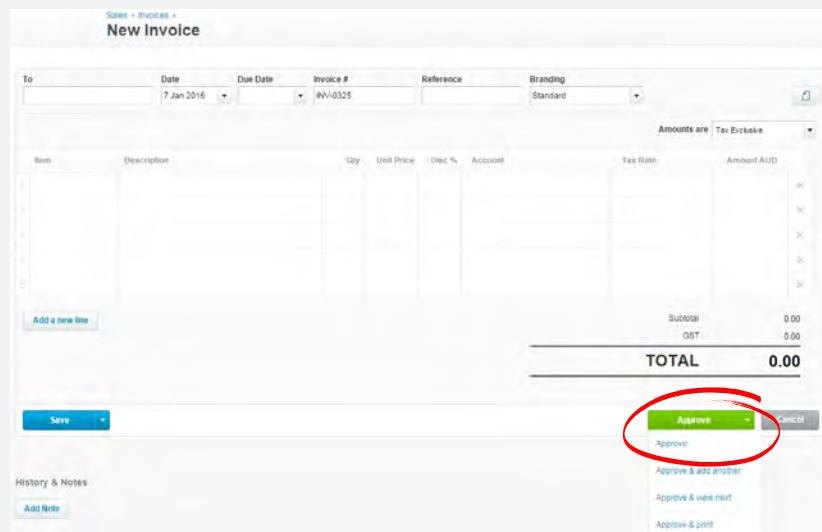
Within your New Invoice

1. Enter the name of the customer that you are sending the invoice to, the date on which you want the invoice to be paid and any reference you need to include
2. Click on the **Branding** drop down menu to choose the **Invoice Branding Theme** that you have linked to Payrix as a payment service
3. Set the **Amounts to Tax Exclusive**



Once you have completed your invoice

4. Click on the **Approve** drop down menu
5. Click **Approve**



HOW DO INVOICES AND PAY NOW WORK?

Once you have completed and approved your invoice

1. Go to the **Accounts** tab
2. Click **Sales**
3. Alongside invoices click **See all** OR under invoices click **Awaiting Payment**

The screenshot shows the Xero Accounts Sales dashboard. At the top, there are navigation tabs: Dashboard, Accounts, Reports, Contacts, and Settings. Below this is the 'Sales' section with a play button icon and text: 'Oversee all of your sales in Xero, see who's overdue and easily chase late payers', 'Create beautiful online invoices so your customers can pay you faster', and 'Send sales quotes online and learn how it's all done in our help article'. Below the text are buttons for '+ New', 'Send Statements', and 'Import', along with a search bar. The 'Invoices' section has tabs for 'Paid', 'Repeating', and 'See all' (circled in red). Below the tabs are four summary cards: 'Draft (39) 4,044.70', 'Awaiting Approval (1) 110.00', 'Awaiting Payment (130) 14,130.40' (circled in red), and 'Overdue (122) 13,083.20'.

In the **Awaiting Payment** tab

1. Select an invoice
2. Click **Email**

The screenshot shows the 'Awaiting Payment' tab in Xero. At the top, there are buttons for '+ New Invoice', '+ New Credit Note', 'Send Statements', 'Import', and 'Export'. Below these are filter tabs: 'All', 'Draft (0)', 'Awaiting Approval (0)', 'Awaiting Payment (3)' (circled in red), 'Paid', and 'Repeating'. Below the tabs are buttons for 'Print', 'Email' (circled in red), and 'Deposit'. A summary bar shows '1 item selected | 660.00 AUD' and '3 items | 1,210.61 AUD' with a search bar. Below is a table of invoices:

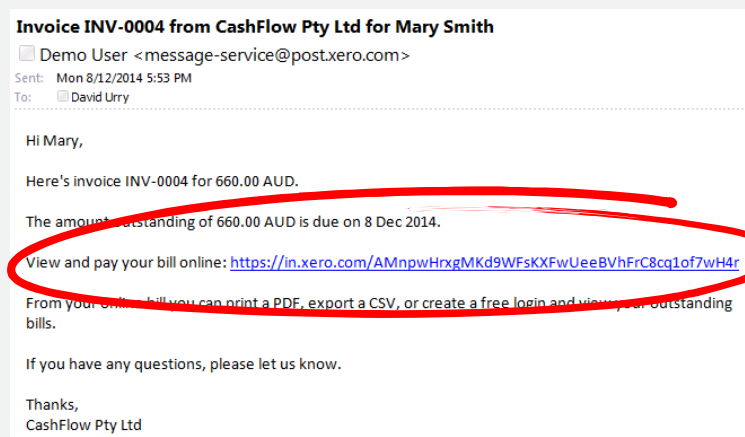
Number	Ref	To	Date	Due Date	Expected Date	Paid	Due	Sent
<input checked="" type="checkbox"/>	INV-0004	CashFlow Material	Mary Smith	8 Dec 2014	8 Dec 2014	0.00	660.00	
<input type="checkbox"/>	INV-0003	David Test 2	David Test 2	8 Dec 2014	8 Dec 2014	0.00	275.00	✓
<input type="checkbox"/>	INV-0001		Glenn Yuen	28 Nov 2014	28 Nov 2014	0.00	275.61	✓

HOW DO INVOICES AND PAY NOW WORK?

The **Send Invoice** dialog box will appear

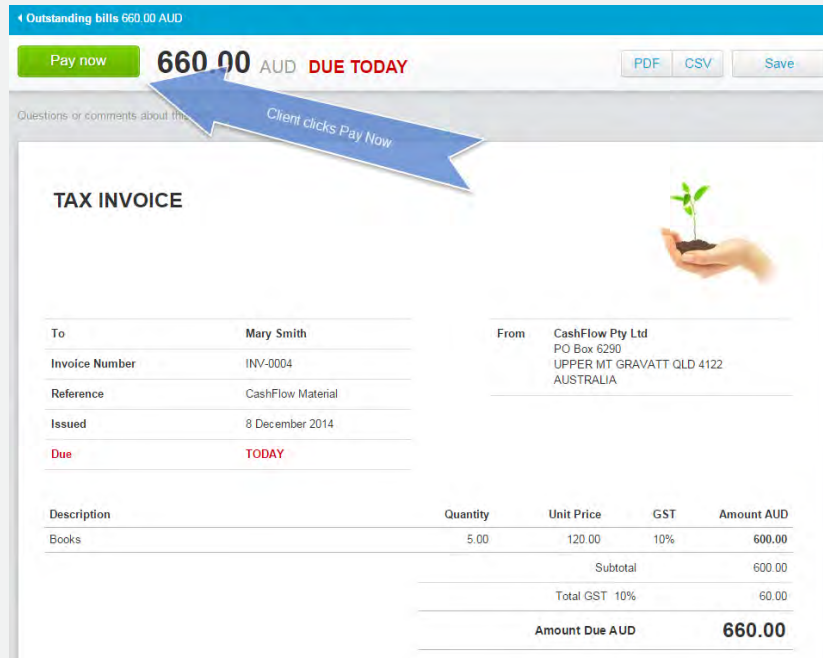
1. Ensure the email address is correct
2. Amend the content of the email if required
3. You can choose to
 - a. **Include files as attachments** – enables you to attach any contracts, purchase orders, etc, to the email
 - b. **Include PDF attachment** – enables you to attach a PDF copy of the invoice to the email
 - c. **Send me a copy** – enables you to send a copy of the email, with any attachments, to yourself
4. Click **Send**

Your customer will receive an email containing a link to view and pay their bill online as per the example below.



HOW DO INVOICES AND PAY NOW WORK?


The link within the email will open the invoice in the customer’s web browser, featuring the ‘Pay Now’ button.



When the customer clicks the ‘Pay Now’ button, they will be directed to a secure and customised page where they can make payment using their preferred credit / debit card or bank account.

NOTE: the payment page can be customised to include your company’s logo and the relevant card or account surcharges, if you have elected to pass these on to your customer.

HOW DO INVOICES AND PAY NOW WORK?

 COMPANY NAME HERE

Your logo here

SECURE HOSTED PAYMENT

1. Payment Information

You are paying:	Salec Demo Site
Payment amount:	\$660.00
Description:	Payment of Xero invoice #INV-0197

2. Payment Method

First Name *	Last Name *
<input type="text"/>	<input type="text"/>


Address *	Suburb / State / PostCode *
<input type="text"/>	<input type="text"/> ACT <input type="text"/>

Email *

Customer can choose to pay from Credit Card, Debit Card or Bank

Credit Card
Surcharge: 1.99% (3.50% for AMEX) will be added to the payment amount


Bank Account
Surcharge: \$0.99 will be added to the payment amount


Card Number *	Supported Cards
<input type="text"/>	
Name on Card *	Expiry Date *
<input type="text"/>	1 2015


Any fee surcharges clearly listed

Card Security Code *

3. Process Payment

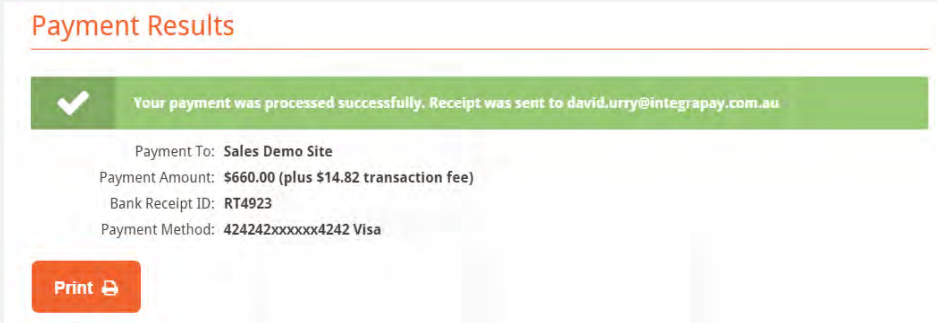
 Click "Process Payment" below to complete your payment.

Powered by  Payrix



HOW DO INVOICES AND PAY NOW WORK?

Once your customer has completed the payment page and clicked **Process Payment**, a successful payment will return the following notification and the customer will automatically receive an email confirming their payment.

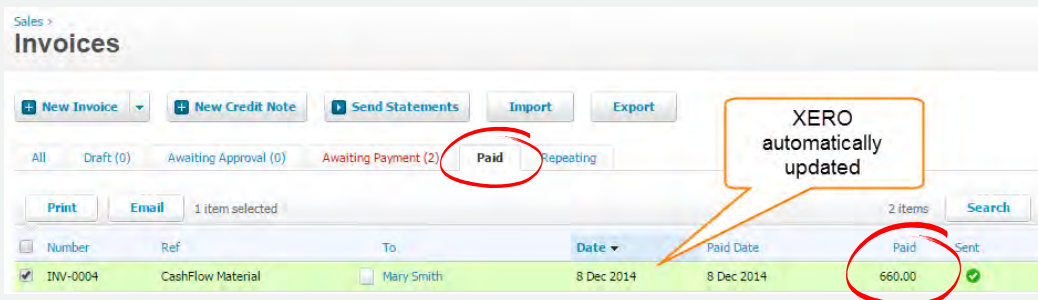


Payments made by credit / debit card will be updated in Xero as soon as a successful payment has been processed.

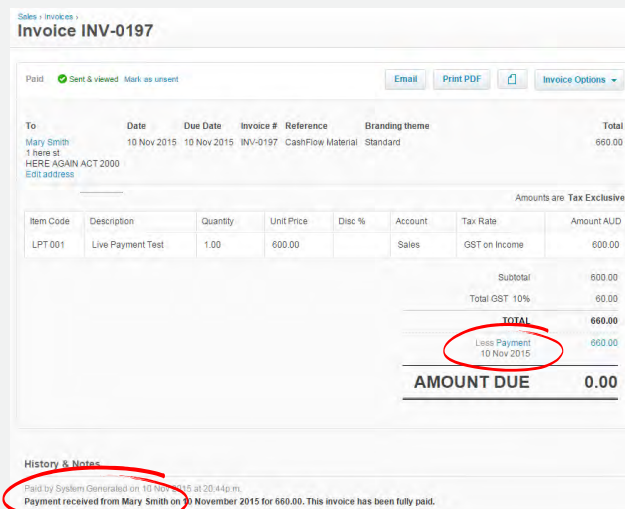
If the customer has elected to pay by bank account, the invoice will be automatically updated in Xero, upon settlement of the payment from Payrix to your business.

Payments will be recorded

1. In the **Paid** tab of the **Invoices** page AND



2. On the invoice itself

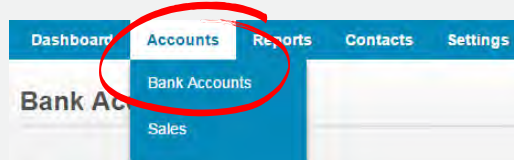


HOW DO INVOICES AND PAY NOW WORK?

To review confirmation of the payment,

1. Click **Less Payment**, as shown on the invoice above. Alternatively, you can view payment confirmation from the **Accounts** tab

1. Click **Bank Accounts**



2. Click on your business' account

3. The transaction record will be loaded showing **Reconciled**.

Transaction: Payment

Reconciled 10 Nov 2015 [View Details](#) What's this? Options

Contact	Inv #	Date	Due Date	Total	Payment Amount
Mary Smith	INV-0197	10 Nov 2015	10 Nov 2015	660.00	660.00
Total				660.00	

For instructions on setting up payments for Repeating Invoices or Automatic Reconciliation, please see the Direct Debit Process Guide and the Automatic Reconciliation Explained documents.