

Xero

User Guide - V1.1

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1 About Xero

Xero is software used to utilise payments services and streamline the payments process to more effectively manage cash flow.

Once enabled it allows merchant accounts to connect to their Xero platform and use it to create and send invoices and make payments.

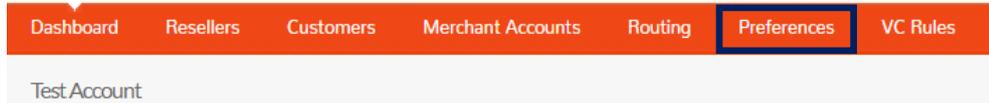
To setup a payment service, a user must grant the payment gateway access through Xero's standard OAuth 2.0 flow. Along with a user's OAuth 2.0 tokens, the payment gateway will obtain organisation details and account preferences for recording payments and fees.

The user logs into the payment gateway and clicks the 'Connect to Xero' button. They can choose to use either their own or the gateway providers OAuth 2.0 details. Once their credentials have been confirmed they are redirected to Xero's authorisation screen. Here they enter their Xero login details and select which organisation (if more than one) to use. Once the connection has been authorised the user is directed back to the payment gateway.

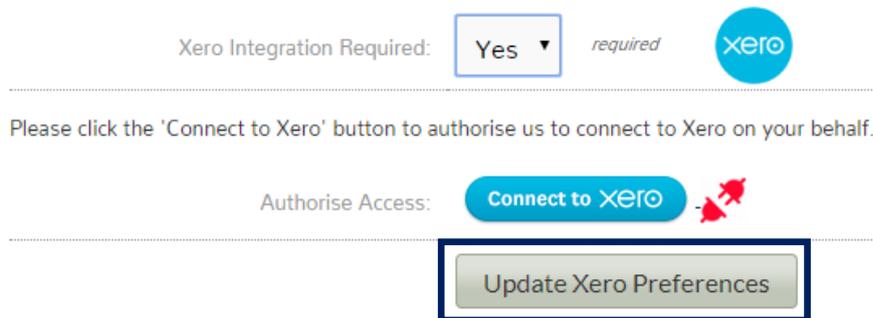
Please note that Merchants must request Xero enable the Payment Service permission on their Xero account to allow a connection to be made.

2 Connecting to Xero

1. Xero settings can be accessed via the **Preferences** tab in the MMS (Merchant Management System).



2. Contact your Gateway provider to activate Xero on your account and Xero to enable the Payment Service Permission on your Xero account.
3. Once activated Xero options become available. Select **Yes**, then click **Update Xero Preferences** to confirm Xero integration is required for this account.



4. Click the **Connect to Xero** button to authorise the payment Gateway to connect to Xero on your behalf. Next, choose to connect either via the Gateways Xero credentials or your own. Selecting to use your own opens a pop-up screen to enter your API details. If using the Gateway's, just click **Connect to Xero**.

Authorise Access To Xero

Please choose whether to authorise us access to the Xero API using our credentials or alternatively enter your own API credentials.

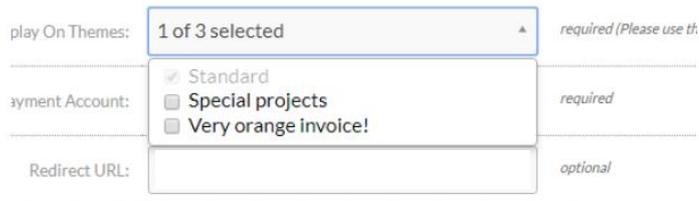


Please note if you receive a 500 error when connecting to Xero, this is normally caused by not having the Payment Service permission on your Xero account. Please contact Xero and ask for this to be added.

5. You will now be directed to Xero's authorisation screen. Enter your Xero login details.

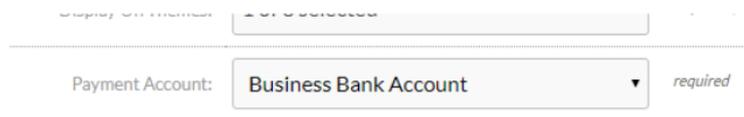
If you have more than one Xero account, there will be a drop down of available Xero accounts available. They appear in alphabetical order – choose the account you wish to login to.

6. Your connection has now been authorised to access Xero’s API. Check you are logging into the correct account and click **Allow Access** to continue.
7. Now, you can configure your settings. First, select the organisation you would like to configure. A drop-down list will appear if you have more than one.
8. Next, select the Theme,



The screenshot shows a configuration form with three sections. The first section is labeled 'play On Themes:' and has a dropdown menu showing '1 of 3 selected' with an upward arrow. To its right is the text 'required (Please use th:'. The second section is labeled 'ayment Account:' and has a dropdown menu with three options: 'Standard' (checked), 'Special projects', and 'Very orange invoice!'. To its right is the text 'required'. The third section is labeled 'Redirect URL:' and has an empty text input field. To its right is the text 'optional'.

9. The bank account the invoice should be paid to,



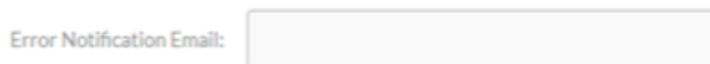
The screenshot shows a configuration form with two sections. The first section is labeled 'Payment Account:' and has a dropdown menu showing 'Business Bank Account' with a downward arrow. To its right is the text 'required'.

10. Then, enter the URL the customer will go to once the payment is complete. *This is an optional field.*



The screenshot shows a configuration form with one section labeled 'Redirect URL:' and an empty text input field. To its right is the text 'optional'.

11. Finally, enter an email address that any error reports can be sent to. This means you can be alerted when customers are having any problems paying their invoice via the Gateway. To enter multiple email addresses separate them with a comma. *This is an optional field.*



The screenshot shows a configuration form with one section labeled 'Error Notification Email:' and an empty text input field.

12. To create your payment service, click **Update Xero Preferences**.
13. Your payment service has now been created and will show under your Active Payment Services list.



The screenshot shows a table titled 'Active Payment Services'. The table has three columns: 'Name', 'Service', and 'Branding themes using this service'. There is one row with the value 'democo@democo.co' in the 'Name' column. To the right of the table is an 'Edit' button with a plus sign.

Name	Service	Branding themes using this service
democo@democo.co		

14. Click **Edit** to make any changes to the payment service.



The screenshot shows a table titled "Active Payment Services". The table has three columns: "Name", "Service", and "Branding themes using this service". The first row contains the email address "democo@democo.co" in the "Name" column. In the bottom right corner of the table, there is a blue button labeled "Edit" with a small right-pointing arrow, which is highlighted with a blue rectangular border.

Name	Service	Branding themes using this service
democo@democo.co		

15. Here, you can configure how you would like the payment service name to appear, your custom URL and the pay now text you would like to appear on online invoices. Click **Save** to apply any changes and **Cancel** to return to your active payment services list.

16. From your active payment services list, you can edit your themes by clicking **Manage Themes**. Any changes will apply to all payment services.