



AffiniPay Payment Page Integration with XERO Accounting

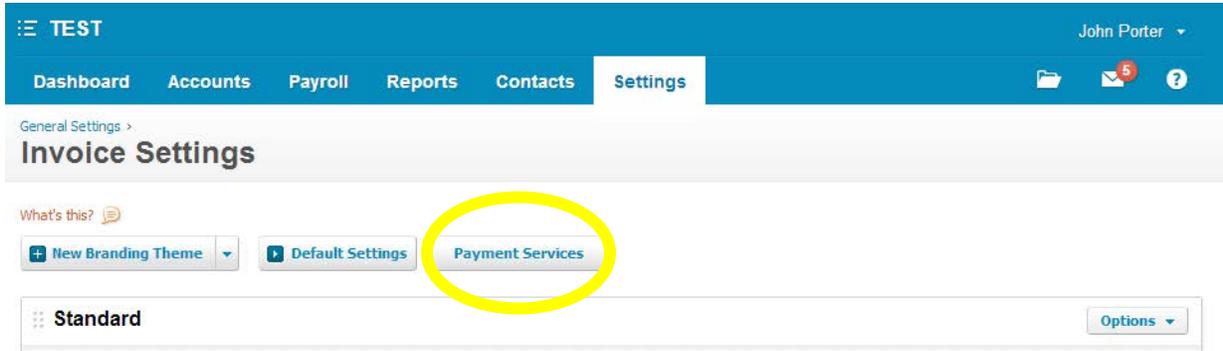
To integrate your payment page with XERO® Accounting Software, you must “Add a Payment Service” in the invoice Setting in your XERO Account.

Log into your XERO Account and click on the Settings Tab:

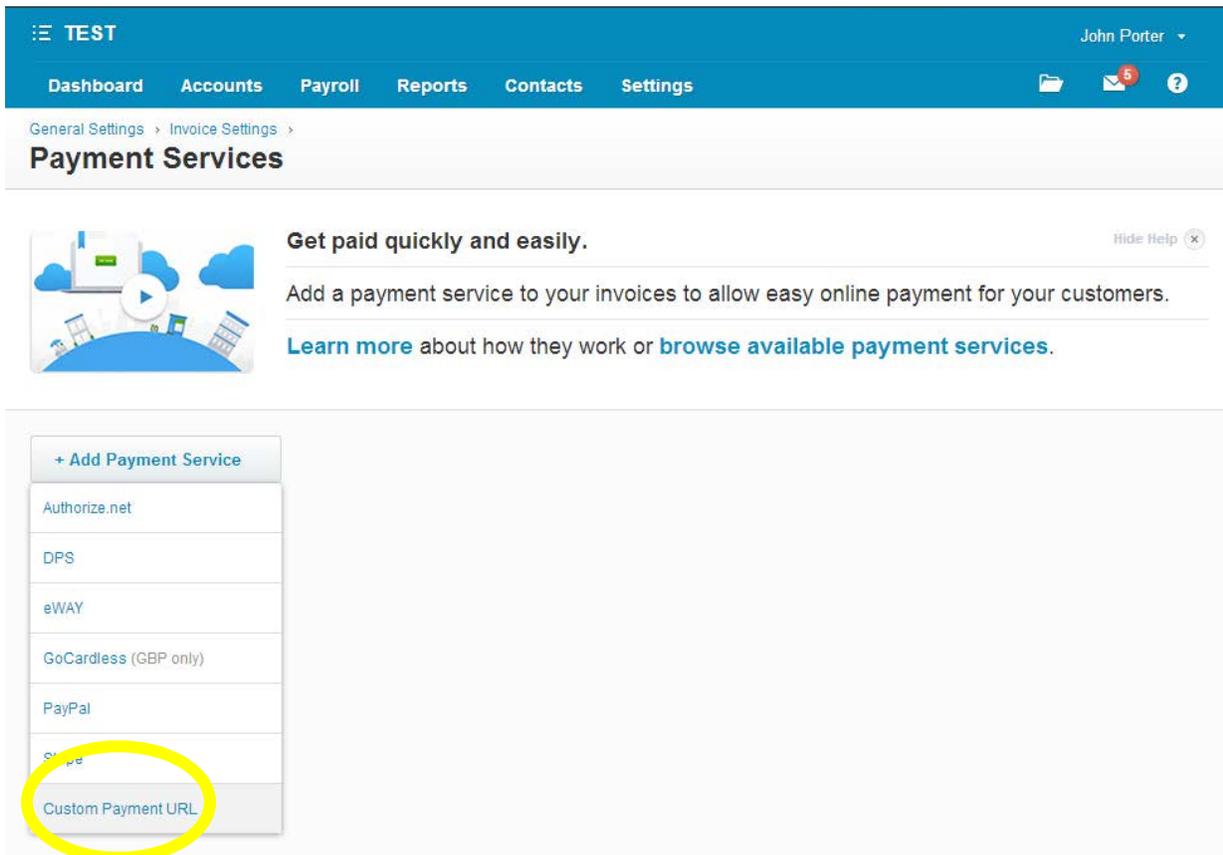
The screenshot shows the XERO Accounting Software interface. At the top, there is a navigation bar with the following tabs: Dashboard, Accounts, Payroll, Reports, Contacts, and Settings. The 'Settings' tab is highlighted, and a dropdown menu is open, showing the following options: General Settings, Chart of Accounts, and Inventory Items. The 'Inventory Items' option is circled in yellow. Below the navigation bar, the main content area is divided into several sections: General Settings, Organization, Features, and Connect. Under the Organization section, there are several options: Organization Settings, Tracking, Conversion Balances, Tax Rates, Chart of Accounts, Financial Settings, Users, and Custom Contact Links. Under the Features section, there are two options: Invoice Settings and Inventory Items. The 'Inventory Items' option is circled in yellow. Under the Connect section, there are two options: Xero To Xero and Add-ons.



From the Settings Area, choose Invoice Settings, and press the “Payment Services” button.

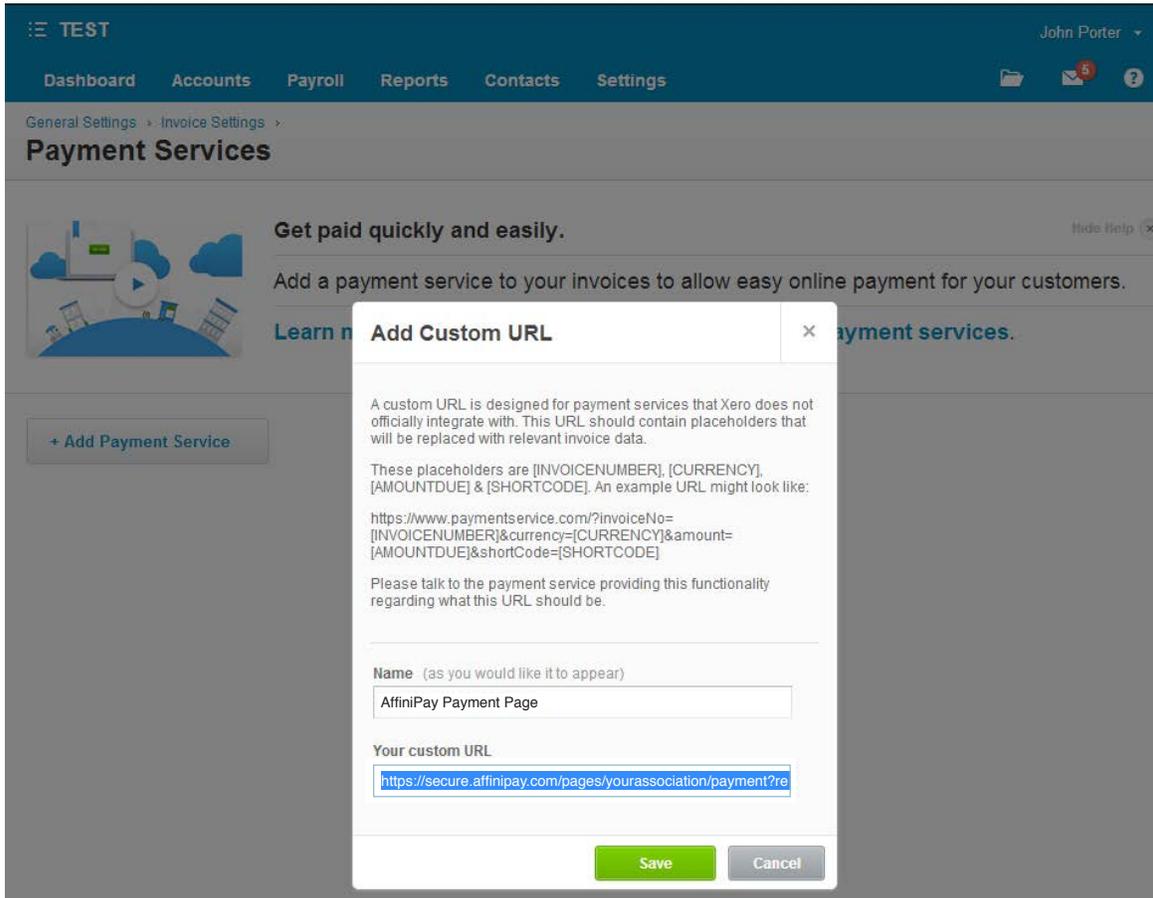


From the Payment Services Screen, click the button to “+ Add Payment Services”, and select Custom Payment URL:





After clicking “+ Add Payment Service” you will see a window like the one below. Give your payment service a name of your choosing and enter the custom URL in the second field (see below for more information about the custom URL syntax).



The custom URL is a variation of the payment page link you have already been provided by AffiniPay and should look something like this: <https://secure.affinipay.com/pages/yourassociation/payment>.

In order for XERO to pass some additional details like invoice number and the amount owed, you need to append the URL. Using the example given in the line above, the URL for the example above should look exactly like the following:

[https://secure.affinipay.com/pages/yourassociation/payment?reference=\[INVOICENUMBER\]&amount=\[AMOUNTDUE\]&amount_ro=1](https://secure.affinipay.com/pages/yourassociation/payment?reference=[INVOICENUMBER]&amount=[AMOUNTDUE]&amount_ro=1)

In essence, you will simply append your normal payment page URL with the following:
“?reference=[INVOICENUMBER]&amount=[AMOUNTDUE]&amount_ro=1”



The final step is to “Activate” this Payment Service within your XERO Invoices section. Go back to the Settings Tab in your XERO account and Select Invoice Settings. You should have at least one Invoice Theme (but you may have more than one if you have customized your invoice). You must enable the AffiniPay Payment Service on your invoice theme. Click the “Options” button at the top right of the Invoice Theme where you wish to enable payment, and select Edit. You should get a screen that looks something like this:

The screenshot shows the 'Edit Branding Theme' dialog box in Xero. The 'Name' field is set to 'Standard'. The 'Page size' is set to 'US Letter'. The 'Top margin' is 0.50, 'Bottom margin' is 0.40, and 'Address padding' is 0.40. The 'Font' is 'Calibri' and 'Font size' is '9pt'. The 'Draft Invoice title' is 'DRAFT INVOICE', 'Approved Invoice title' is 'INVOICE', 'Overdue Invoice title' is 'INVOICE', 'Credit Note title' is 'CREDIT NOTE', 'Statement title' is 'STATEMENT', 'Draft Purchase Order title' is 'DRAFT PURCHASE ORDER', and 'Purchase Order title' is 'PURCHASE ORDER'. The 'Payment Services' dropdown menu is highlighted with a yellow circle and shows 'AffiniPay Payment Page' selected. Other options include 'Show tax number', 'Show column headings', 'Show unit price & quantity', 'Show payment advice cut-away', 'Show tax column', 'Show registered address', 'Show logo', and 'Hide Discount'. The 'Logo alignment' is set to 'Right' and 'Show taxes as' is set to 'Exclusive'. The contact details field contains 'TEST'. The 'Save' button is green and the 'Cancel' button is grey.

Under the Payment Services drop-down menu select your Custom URL Payment Service. In the example above, I named it AffiniPay Payment Page.

Now you can create and send invoices to your customers that will have a Pay Now button on them, and they will redirect to your normal AffiniPay Payment Page.



As a reference here is what your customer should see. When they press the Pay Now button, they will be redirected to your AffiniPay Payment Page and prompted for their Credit Card or Bank Account Information (if you are subscribed to ACH Payments).

← Outstanding bills 10,000.00 USD

Pay now **10,000.00** USD [PDF](#) [CSV](#) [Save](#)

Questions or comments about this bill?

INVOICE

To	JOhn	From	TEST
Invoice Number	INV-0002		
Issued	July 2, 2014		
Due	July 29, 2014 27 days till due		

Description	Quantity	Unit Price	Tax	Amount USD
TEST	1.00	10,000.00	Tax on Sales	10,000.00
		Subtotal		10,000.00
		Total Tax		0.00
		Amount Due USD		10,000.00

XERO