

GETTING MORE FROM XERO - USING 'PAYMENT SERVICES'

What do 'Payment Services' do ?

Xero includes a feature called '**Payment Services**' which allows Customers to simply and easily pay your invoices using credit cards, Apple Pay, recurring payment arrangements or by direct debit !

Once Xero is connected directly to **Stripe, PayPal** and **GoCardless**, it enables payments to be taken **online** through '**links**' or '**buttons**' on each of the invoices sent out to your Customers.

Additionally mandates can be authorised with Customers to enable future invoices to be paid automatically on their '**due date**' - or by direct debit !

How do I use the feature within Xero?

Customers simply receive a '**link**' or a '**Pay Now**' button on each invoice sent from Xero, from where they can go online to make an immediate payment of the invoice, or to set up a direct debit.



Xero will also automatically reconcile the payments and the associated fees once the payment process has been completed !

NOTE - to '**connect**' each of **Stripe, Paypal** and **GoCardless** with Xero, the business is required to have an account with each of the payment providers.

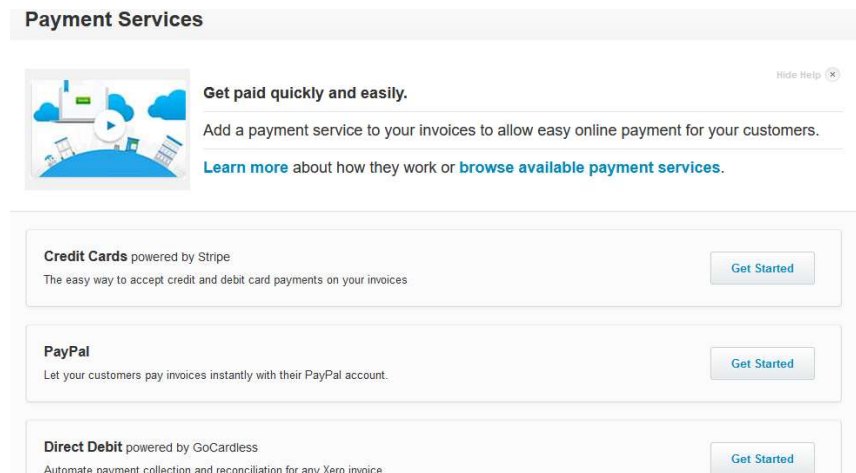
When should I use it in my business ?

- **Save time** – significantly reduce your time on credit control as many more of your invoices will either be paid immediately, or be paid by a known future date - **freeing up your time to focus on more important things.**
- **Improve business Cashflow** – Cash is King ! Get paid quicker and more easily by Customers, ensuring more of **Your** cash is in **Your** account !
- **Accurate** – Xero will automatically ensure that the payments and associated fees are recorded accurately in the accountancy software



GETTING MORE FROM XERO - USING 'PAYMENT SERVICES'

Do I need to set it up in Xero ?



The screenshot shows the 'Payment Services' section in Xero. At the top, there is a header 'Payment Services' and a 'Hide Help' button. Below this is a main heading 'Get paid quickly and easily.' followed by a sub-heading 'Add a payment service to your invoices to allow easy online payment for your customers.' and a link 'Learn more about how they work or browse available payment services.' Below this are three service cards: 'Credit Cards powered by Stripe' with a 'Get Started' button, 'PayPal' with a 'Get Started' button, and 'Direct Debit powered by GoCardless' with a 'Get Started' button.

Yes - each payment provider requires to be setup and configured in Xero !

For **Stripe** and **PayPal**, it is a fairly straightforward '**connection**' process, however as **GoCardless** provides both recurring payment arrangements AND direct debits, the setup and '**connection**' process is more complex and detailed.

Is there any additional cost or is it included in my current subscription ?

No – this is a feature that is part of your existing Xero software subscription.

However there may be a 'support or setup' fee where you need additional assistance with the GoCardless setup and '**connection**' with Xero.

Can the Sakura Team assist with this ?

Yes.

If you are on our **Xero Support service**, then arrange a call with Nasima who will happy to discuss how the '**Payment services**' feature may apply to your business and/or to assist with the '**connection**' process.

