



Connecting Xpress-pay to QuickBooks Online

Below are the steps to allow Xpress-pay to access your QBO file. Intuit/QBO requires you to complete this connection since we do not have access to your QBO information, though we remain available to assist you.

Step 1: Create a QBO account for incoming ePayments (one time)

1. In QBO: Hover on Accounting, click *Chart of Accounts*
2. Upper right: Click *New*
3. Account Type: Select *Other Current Assets*
4. Name: *Xpress-pay Payments*
5. Click *Save* (stay logged into QBO)

Step 2: Authorize Xpress-pay Access (one time)

1. [Click here](#) to log into Xpress-pay Merchant Administration
2. In *QuickLinks*, click *Payment Types*. All will be listed.
3. Click the pencil icon (edit) on the payment type you will use for QBO
4. Click the *Global aXcess* tab, then click *Authorize Access*
5. You may be required to log into QBO. If you have multiple companies, select the one to authorize. Click *Next* to authorize and return to Xpress-pay.
6. Click the *Global aXcess tab*; for *Global aXcess Deposit Account*, Select *Xpress-pay Payments*
7. Click *Update*

Daily: Record the bank deposit

Your bank will receive a daily deposit for ePayments (two if accepting both cards and eChecks). These will include payments for QBO invoices as well as any other payment types you accept through Xpress-pay. To separate and record the QBO payments:

1. Produce an Xpress-pay Payment Summary Report, noting the total for *Xpress-pay payments*
2. Record a QBO deposit using the following:
 - Received from: ePayments (use *QuickAdd* the first time)
 - Account: *Xpress-pay Payments*
 - Description: *ePayments*
 - Method: *Direct* (use *QuickAdd* the first time)
 - Amount: Enter the amount from Step 1. That's it!

Public Awareness

Payments generally originate from two sources: your invoices and your website. Here are the steps to include payment links for both:

Payment link for your invoices and emails

1. To add a payment link to your invoices:
2. In QBO, click the *Gear* icon in the upper right, then *Custom Form Styles*
3. In the *Form Type* column, find the form you use for invoices and click *Edit* to its right
4. Upper left: Click *Content*
5. In the lower right of the invoice form, click on Total due
6. Select and copy the entire next line:
Click here to pay online: **[org link here]**
...and paste it into the *Add footer text* box
7. To its right, increase the font size to *12pt*
8. In the upper left, click the *Emails* tab
9. Make sure the *PDF Attached* box is checked
10. Select and copy the entire next line (same link as above):
Click here to pay online: **[org link here]**
...and paste it into an appropriate place in the *Message to Customer* box
11. Click *Done*

Payment Button for your Website

Provide the following (or this entire document) to your webmaster:

- Download button image (may be resized but maintain height/width ratio)...
For payments: <https://enroll.xpress-pay.com/images/banners/xpress-pay-payment.png>
For donations: <https://enroll.xpress-pay.com/images/banners/xpress-pay-donation.png>
- Button hyperlink: **[org link here]**
- Narrative for visitors: While optional, informing customers that their payment will be processed by Xpress-pay will elevate consumer confidence. If a Site Fee is to be charged:
 - a) You may state so, but do not include rates as they are subject to industry changes.
 - b) Your statement must include the following: Xpress-pay charges a Site Fee for the delivery and security services provided during your payment. Alternative payment methods remain available.