

Xero:

Xero is easy to use online accounting software that's designed specifically for small businesses. Xero has all you need for billing - invoicing, paying bills, reporting & more.


Agile CRM integrates with Xero to offer a CRM billing solution. Agile's Xero integration lets you manage your invoices, track payments and billing histories right from the CRM.

Here's a detailed setup description of the Agile's Xero integration:

1. Locate the Xero widget


Go to Preferences page ---> Widgets and find the Xero widget under the Billing section. Click on the '+Add' button on the widget to integrate Xero with Agile.

Billing View and send invoices




FreshBooks enables the ability to create and manage invoices, estimates, expenses, and projects all in one place.

+ Add




Stripe enables individuals and businesses to accept payments over the internet.

+ Add



Xero is an online accounting software for small business - Explore invoicing, reconciliation anytime, anywhere.

+ Add



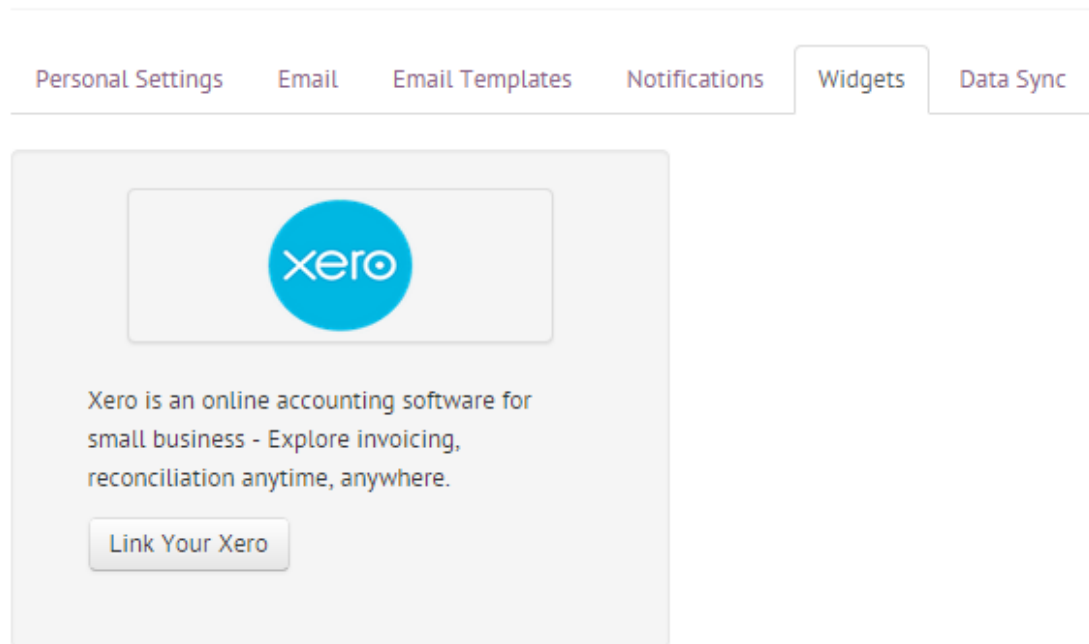
Run your whole business better with QuickBooks wherever you are. Automate your invoicing, billing and...

+ Add

2. Link your Xero Account

Upon clicking the '+Add' button, the following window appears. Click on the 'Link your Xero' button. It directs you to the Xero login page. Login into your Xero account & click on the 'Authorize' option to link your Xero account to Agile CRM. That's it!

Preferences



3. Manage Invoices

Now that you are done with integration, go to contact pages to see the list of invoices associated with them, in a widget (shown in the image below) on the right side of the contact page. You can track and manage payments, invoices and billing histories right from the CRM.

Xero	
Sheldon Cooper	
+ Add Invoice	
Invoices	
INV-0036 Receivable 12 days ago	USD 97.43 Authorised
INV-0037 Receivable 3 days from now	USD 703.63 Authorised
INV-0044 Receivable 21 days ago	USD 2657.54 Authorised

Related Links:

[Xero - Agile CRM integration \(blog\)](#)

[Stripe - Agile CRM integration](#)

[FreshBooks - Agile CRM integration](#)

[QuickBooks - Agile CRM integration](#)