



HELPSHEET: HOW TO ADD A PAYMENT BREAKDOWN TO THE SUMMARY FIELD IN XERO

Purpose

In this help sheet we provide a guide to using the *summary* field inside the Xero *quote* builder to add **tailored text** for your client to read. We also include some **sample text** to get you started.

Key Information

- Xero offers the option to add a **custom theme** template. This template contains **embedded text** that has been added by you or by Tradie Terms as part of our service.
- Whereas embedded text **does not change** you may also wish to add **customised text** to supply **job specific** information to your client.
- The *summary field* in the Xero quote builder allows you to add in **your own text**.
- The *summary field* text can be written each time or you can save the wording to a document on your drive and paste each time.

Watch

Watch [this video](#) on how to follow the steps below (4mins).

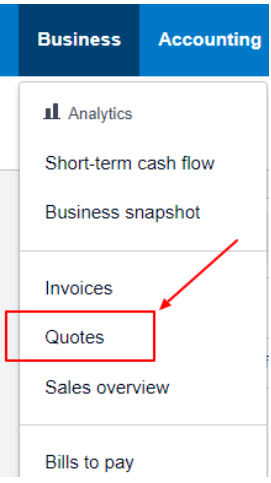
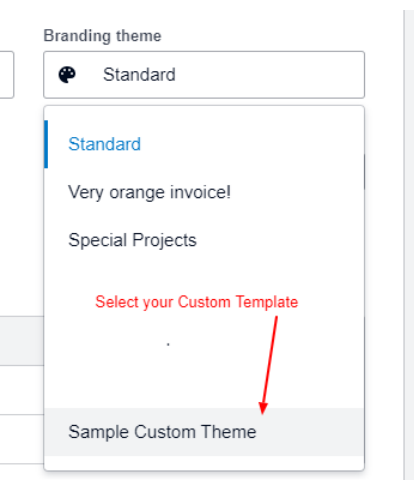
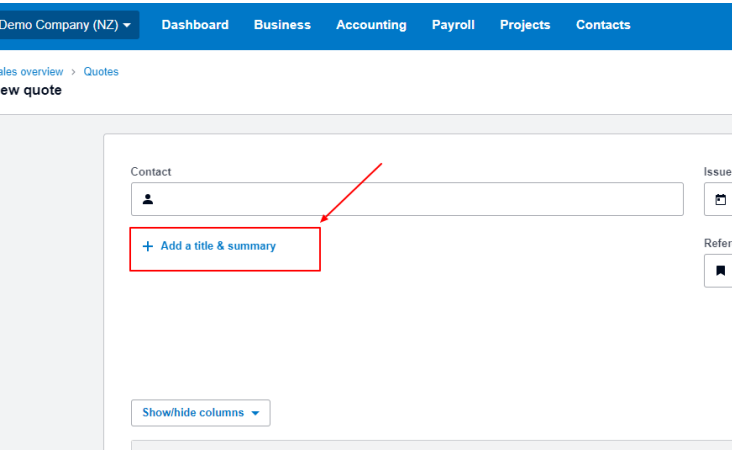
TT_013_How to Add a Payment Breakdown to your Xero Quotes Helpsheet_ Tradie Terms.

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Disclaimer: Tradie Terms does not control the Xero platform and accepts no responsibility for any system bugs or issues that may affect the completion of this procedure. This procedure is based on Tradie Terms' knowledge of how to achieve the desired outcome to embed terms of trade and custom text and follows the Xero published procedure guides where available.

Xero issued procedures are also available at www.xero.com.

Steps to Follow


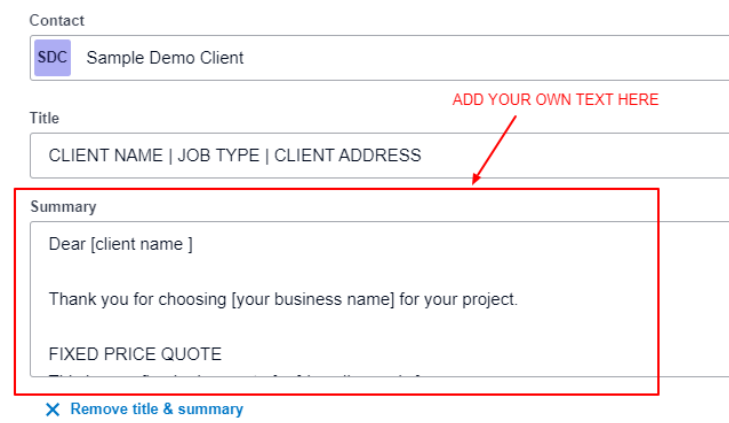
<p>> Go to Quote in your Xero dashboard</p>	 <p>The screenshot shows the Xero Accounting menu. The 'Quotes' option is highlighted with a red box, and a red arrow points to it from the right.</p>
<p>> Create a quote using your Custom Theme template</p>	 <p>The screenshot shows the 'Branding theme' selection screen. The 'Sample Custom Theme' option is highlighted with a red box, and a red arrow points to it from the right. The text 'Select your Custom Template' is written in red above the highlighted option.</p>
<p>> Go to Summary field in quote dashboard</p>	 <p>The screenshot shows the Xero Quote dashboard. The 'Add a title & summary' button is highlighted with a red box, and a red arrow points to it from the right. The dashboard includes a 'Contact' field, an 'Issue' button, and a 'Refer' button.</p>

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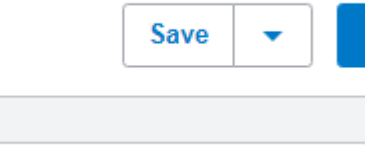
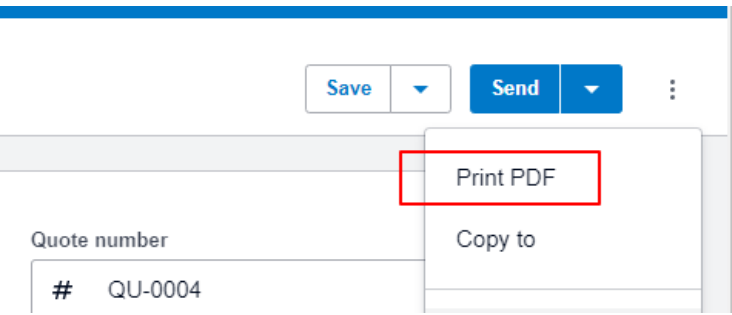
<p>> Click to expand</p>	
<p>> Add client name, job and address into the Title Field</p> <p><i>Hint: this is a free text box. You can write what you wish.</i></p>	<p>Examples:</p> <p>Title ABC BUILD LTD QUOTE FOR BATHROOM RENOVATION 123 TEST STREET</p> <p>Summary</p> <p>Title JO BLOGGS QUOTE FOR BATHROOM RENOVATION 123 TEST STREET</p> <p>Summary</p>
<p>> Add specific text to the Summary Field</p> <p><i>Hint: This is a free text box up to circa 2000 characters of text.</i></p> <p><i>You can create some standard wording for different job types to save time.</i></p> <p><i>Or you can pre-save quotes with this summary text added and select that pre-saved quote from your dashboard.</i></p>	 <p>Include payment terms</p> <p>Summary</p> <p>following instalments:</p> <p>50% Deposit - Payable in 7 days of acceptance of this quote 25% Pre-Install - Payable 7 days prior to the planned installation date 25% Balance - Payable within 7 days of completion (plus any additional variation costs).</p>

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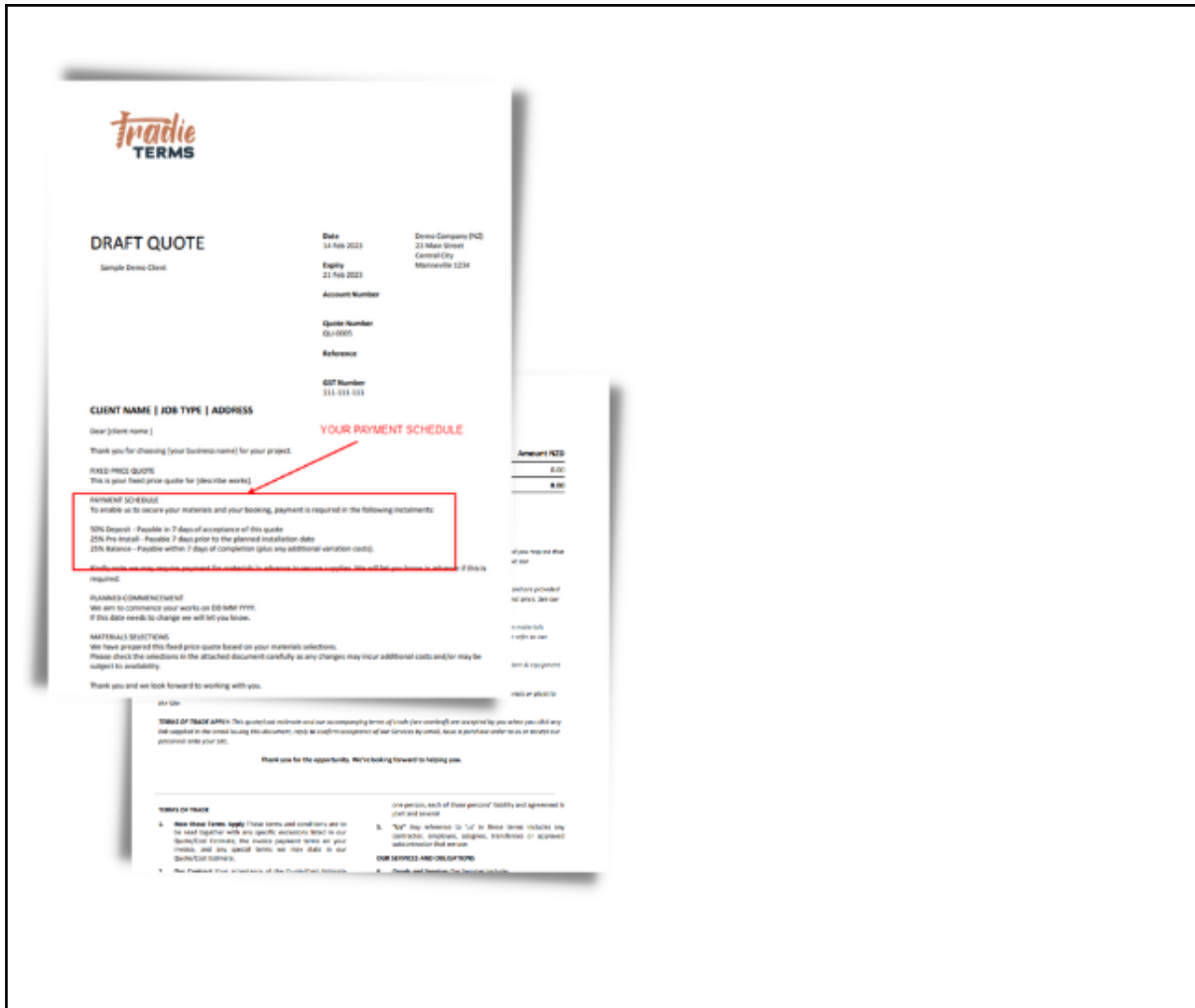
<p>>Save the quote</p>	
<p>> Print PDF of the quote to check what it looks like</p>	
<p>Your quote should look like this</p> <ul style="list-style-type: none"> > Your summary text is added to the front page > Your footer text is pre-loaded to the bottom of the page > Your terms of trade are embedded to the back pages <p>See overleaf for a sample of how this looks on a Xero Quote</p>	

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SAMPLE TEXT FOR SUMMARY FIELD

- **Stuck on what to include?**
- **See our sample text you can copy and paste below.**

Dear [client name]

Thank you for choosing [your business name] for your project.

Choose option:

[COST ESTIMATE][FIXED PRICE QUOTE]

This is your [cost estimate][fixed price quote] for [describe works].

PAYMENT SCHEDULE

To enable us to secure your materials and your booking, payment is required in the following instalments:

50% Deposit - Payable in 7 days of acceptance of this quote

25% Pre-Install - Payable 7 days prior to the planned installation date

25% Balance - Payable within 7 days of completion (plus any additional variation costs).

Kindly note we may require payment for materials in advance to secure supplies. We will let you know in advance if this is required.

PLANNED COMMENCEMENT

We aim to commence your works on DD MM YYYY.

If this date needs to change we will let you know.

MATERIALS SELECTIONS

We have prepared this fixed price quote based on your materials selections.

Please check the selections in the attached document carefully as any changes may incur additional costs and/or may be subject to availability.

Thank you and we look forward to working with you.

Your company name

END

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