



# HELPSHEET: HOW TO ADD YOUR CUSTOM XERO QUOTE TEMPLATE INTO XERO

**Country: All**

## Purpose

In this help sheet we provide a step by step guide to adding your **Xero Custom Word Quote Template** supplied to you by Tradie Terms into Xero.

## Key Information

- Terms of Trade must be **added or linked** to quotes or estimates so that they are accepted by your customer at the correct time. This time is at the **quoting or estimate or order stage**.
- Your terms of trade must be offered to your customer to view and be accepted **before** you perform the work or services if they are to apply.
- This means your customer must be able to **view and read** your terms when reviewing your Quote/Estimate/Order.
- **Adding your terms of trade to the back pages of your Xero quote/estimate document is a great way to achieve this.**
- There are a few ways that your customers can accept your terms of trade in your Xero Quote:
  - By clicking an online link to accept a quote/estimate
  - Confirming acceptance of your quote/estimate by email
  - Issuing a Purchase Order (i.e. by a commercial client)
  - Paying your deposit to confirm your services are accepted
  - Confirming you can come onto their Site or Premises to commence works

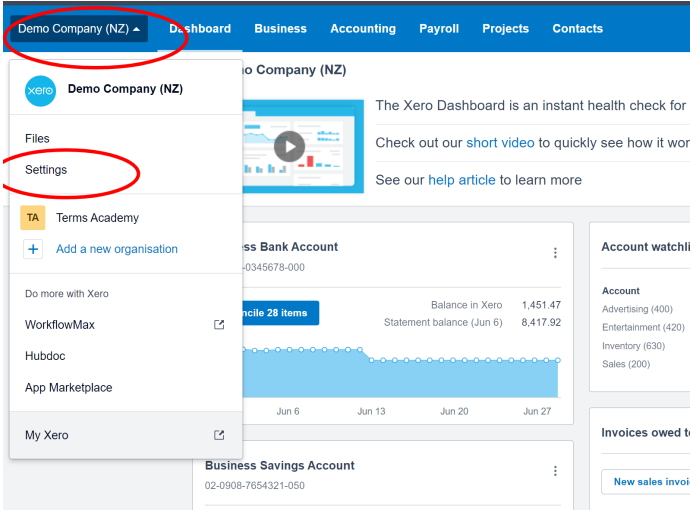
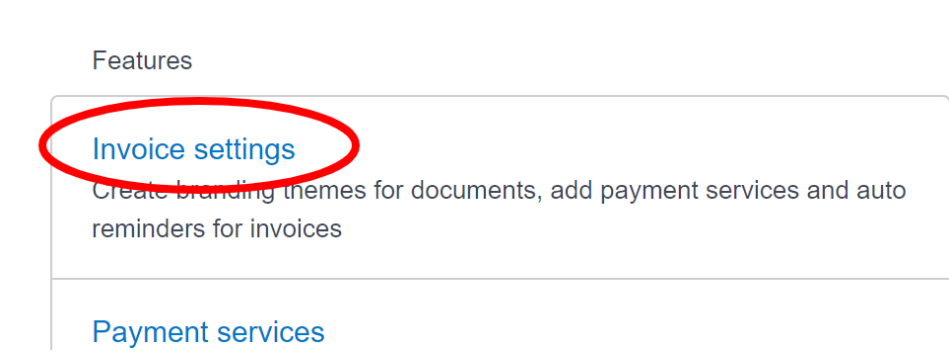
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**Disclaimer:** Tradie Terms does not control the Xero platform and accepts no responsibility for any system bugs or issues that may affect the completion of this procedure. This procedure is based on Tradie Terms' knowledge of how to achieve the desired 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](http://www.xero.com).

# Steps to Follow

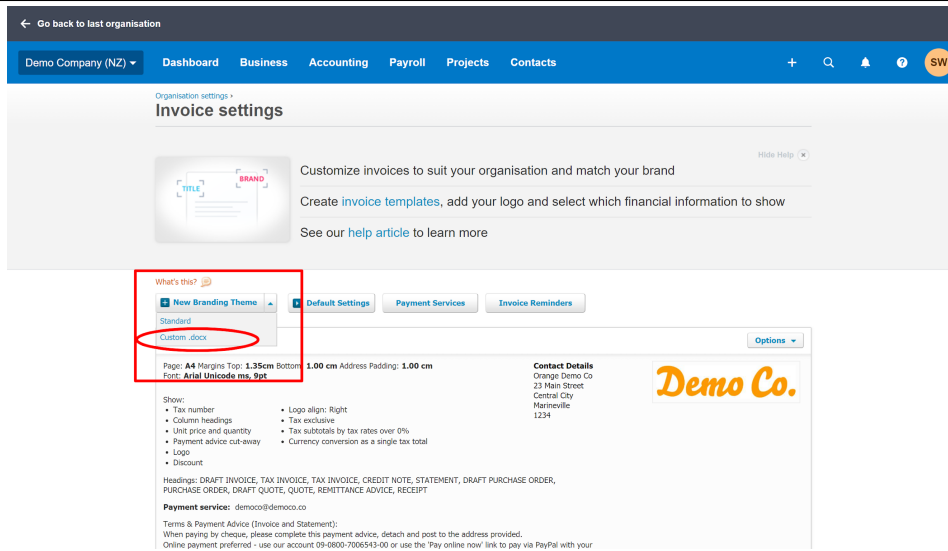
**WATCH WITH TRADIE TERMS :** [Watch this Tradie Terms Tutorial here](#) on how to upload (3 mins)

<b>1</b>	<p><b>GO TO SETTINGS IN YOUR COMPANY INFORMATION IN TOP LEFT OF YOUR XERO DASHBOARD.</b></p>  <p>The screenshot shows the Xero dashboard for 'Demo Company (NZ)'. The top navigation bar includes 'Dashboard', 'Business', 'Accounting', 'Payroll', 'Projects', and 'Contacts'. On the left, a dropdown menu is open, with 'Settings' highlighted by a red circle. Other items in the menu include 'Files', 'TA Terms Academy', '+ Add a new organisation', 'Do more with Xero', 'WorkflowMax', 'Hubdoc', 'App Marketplace', and 'My Xero'. The main dashboard area shows account balances and a chart.</p>
<b>2</b>	<p><b>CHANGE THE NAME OF YOUR DOCUMENT TO QUOTE/ESTIMATE</b></p> <p>Click <a href="#">here</a> to view “How to change the title of Xero Quote to ‘Quote/Estimate’” to enable you to use this document for fixed price quotes and cost estimate</p>
<b>3</b>	<p><b>NOW GO BACK TO SELECT <u>INVOICE SETTINGS</u></b></p>  <p>The screenshot shows the 'Features' section of the Xero interface. A card titled 'Invoice settings' is highlighted with a red circle. The card text reads: 'Create branding themes for documents, add payment services and auto reminders for invoices'. Below this card, there is another card titled 'Payment services'.</p>
<b>4</b>	<p><b>SELECT CUSTOM BRANDING THEME</b></p>

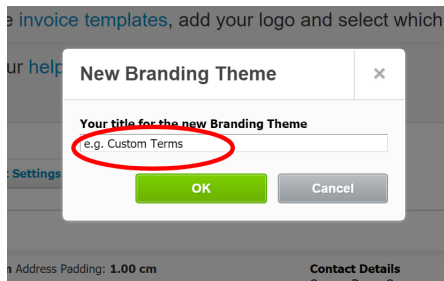
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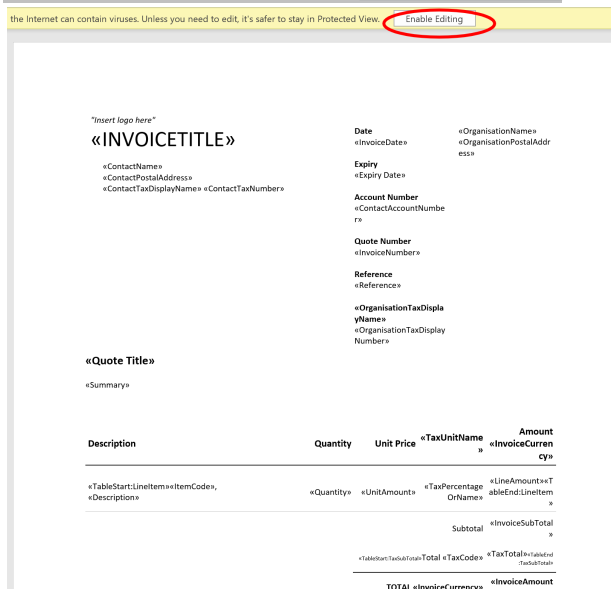


**5 NAME YOUR BRANDING THEME**



**Hint: We Recommend use of the word 'Custom' to help you identify later that this is different to the 'Standard' default Xero theme**

**6 OPEN THE QUOTE CUSTOM.DOCX WORD TEMPLATE PROVIDED TO YOU IN YOUR TRADIE TERMS DOWNLOAD LINK AND CLICK ENABLE EDITING**



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**7** **INSERT YOUR BUSINESS LOGO (\*\*ONLY DO THIS STEP IF WE HAVE NOT ADDED YOUR LOGO FOR YOU\*\*)**

**THIS IS ESSENTIAL: DO NOT SKIP THIS STEP**

the Internet can contain viruses. Unless you need to edit, it's safer to stay in Prote

You need to insert your logo here AS WELL as in the Custom Branding area if you want it to show on your

"Insert logo here"

«INVOICETITLE»

«ContactName»  
 «ContactPostalAddress»  
 «ContactTaxDisplayName» «ContactTaxNumber»

**8** **NOW GO BACK TO THE SETTINGS AREA IN XERO**

**9** **CLICK 'UPLOAD' TO ENABLE YOU TO SELECT YOUR TRADIE TERMS CUSTOMISED XERO QUOTE CUSTOM.DOCX TEMPLATE**

**SELECT 'BROWSE' BELOW THE WORD QUOTE**

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**SELECT YOUR SAVED TRADIE TERMS CUSTOMISED QUOTE TEMPLATE FROM YOUR DOWNLOADS AREA (OR WHEREVER YOU HAVE SAVED IT SAFELY)**

**Upload .docx Templates** [X]

Upload one or more templates.  
Each file can be no larger than 1MB.

**Invoice**  
[Browse] No file selected

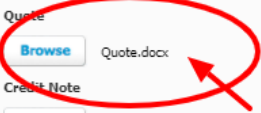
**Quote**  
[Browse] Quote.docx

**Credit Note**  
[Browse] No file selected

**Statement**  
[Browse] No file selected

**Purchase Order**  
[Browse] No file selected

[Upload] [Cancel]



Select your saved customised quote

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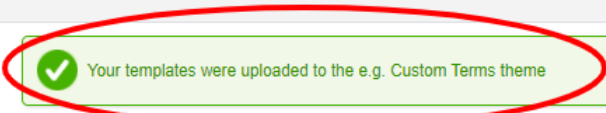
**THIS MESSAGE WILL APPEAR TO CONFIRM YOU HAVE UPLOADED YOUR NEW CUSTOM QUOTE**

**TEMPLATE SUCCESSFULLY!**

[Checkmark] Your templates were uploaded to the e.g. Custom Terms theme

What's this? [Help icon]

[+ New Branding Theme] [Default Settings] [Payment Services] [Invoice Reminders]



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**NOW THE NEXT STEP IS TO CHECK THAT THE UPLOAD HAS WORKED**

**GO TO QUOTE TAB IN BUSINESS TAB**

Go back to last organisation

Demo Company (NZ) Dashboard **Business** Accounting Payroll Projects Contacts

Quote QU Short-term cash flow Business snapshot

Draft

Customer: SAMPLE COMPANY Invoices: Expiry: 7 Jul 2021 Quote number: QU-0001 Reference: Theme: TT DEMO TWO

CLIENT TYPE | ADDRESS

Item	Description	Quantity	Unit price	Disc %	Account	Tax rate	Region	Amount NZD
1	This is a COST ESTIMATE ONLY OR This Quote is a FIXED PRICE							



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**CREATE A DRAFT QUOTE – WATCH [THIS VIDEO](#) ON HOW TO DO THIS OR FOLLOW THE STEPS BELOW**

Sales overview >

**Quotes**

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**14 ADD A SAMPLE CUSTOMER NAME AND THEN GO TO THE THEME ON RIGHT HAND SIDE OF QUOTE SET UP AND SELECT THE CUSTOM THEME INSTEAD OF STANDARD**

Sales overview > Quotes >  
**New Quote**

Create 🔗

Customer  Date 16 Jun 2021 Expiry  Quote number QU-0002 Reference  Theme **Standard**

+ Add a Title & Summary

NZD New Zealand Dollar

Item	Description	Quantity	Unit price	Disc %	Account	Tax rate	Region
⋮							
⋮							

Amounts are


SELECT YOUR CUSTOM THEME QUOTE TEMPLATE

- Standard
- Special Projects
- TRADIE TERMS DEMO
- TT DEMO TWO
- Very orange invoice!
- e.g. Custom Terms

**15 CLICK SAVE**



**Save**

**YOUR DRAFT QUOTE HAS BEEN SAVED**

 Draft Quote Saved - SAMPLE CUSTOMER - Total 0.00  
[View Quote](#)

+ New Quote

All Draft (2) Sent (0) Declined (0) Accepted (0) Invoiced (0)

	Number	Ref	Customer	
<input type="checkbox"/>	QU-0002		 SAMPLE CUSTOMER	1
<input type="checkbox"/>	QU-0001		 SAMPLE CUSTOMER CLIENT NAME   SERVICE TYPE   ADDRESS	7

**16 OPEN THE DRAFT QUOTE AND SELECT PRINT**

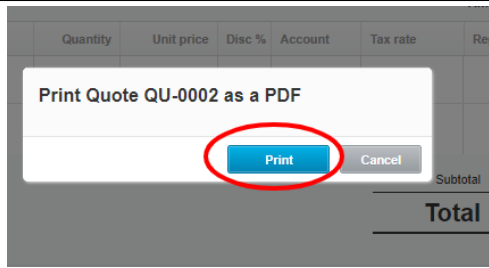
Sales overview > Quotes >  
**Quote QU-0002**

Draft Send **Print** 🔗 Options

Customer  Date 16 Jun 2021 Expiry  Quote number QU-0002 Reference  Theme Standard

+ Add a Title & Summary

**17 SELECT PRINT**



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**OPEN THE PDF**

IT SHOULD SHOW YOU THE NEW CUSTOM TEXT THAT YOU HAVE 'EMBEDDED' PERMANENTLY INTO YOUR CUSTOM THEME QUOTE TEMPLATE

**YOUR QUOTE SHOULD LOOK LIKE THIS**



**YOUR CUSTOM TEXT IS EMBEDDED, SUCCESS!**  
**YOU ARE ADVISING YOUR CLIENT WHERE TO LOCATE YOUR TERMS OF TRADE**

**YOUR TERMS OF TRADE WILL SHOW ON BACK PAGES SUCCESS!**

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**TO ADD CUSTOMISED TEXT FOR SPECIFIC CUSTOMERS**

Once you have created your custom theme template Quote, you will need to add *specific* information into quotes/estimates.

This includes:

- Payment Breakdowns
- Confirmation if the price is Cost Estimate Only or Fixed Price
- Specific exclusions that may not be covered in your Terms of Trade

**[VIEW THIS VIDEO \(13 MINS\)](#) ON HOW TO ADD IN CUSTOMISED WORDING USING THE TITLE + SUMMARY FIELDS IN A XERO QUOTE**

END OF PROCEDURE

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