

# 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**

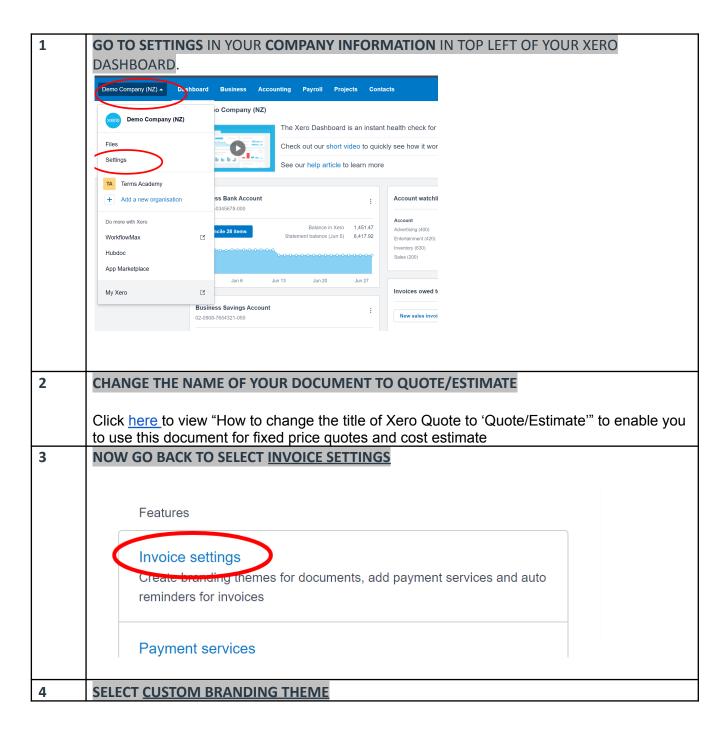
- Terms of Trade must be **added or linked** to quotes or estimates so that they are accepted by your customer at the correct time. This time is at the **quoting or estimate or order stage**.
- Your terms of trade must be offered to your customer to view and be accepted **before** you perform the work 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.

#### **Steps to Follow**

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



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	<ul> <li>← Go back to last organisation</li> <li>Demo Company (NZ) → Dashboard Business Accounting Payroll Projects Contacts</li> <li>+ Q ▲ ♥ SW</li> </ul>
	Crysteleton settings
	Customize invoices to suit your organisation and match your brand
	Create invoice templates, add your logo and select which financial information to show
	See our help article to learn more
	Wart's this?
	Hew Branding Theme      Payment Services     Invoice Reminders  Standard
	Cuation doo: Proc: A4 Marcine Too: 1.35cm Bottom 1.00 cm Address Faddre: 1.00 cm Contact Details
	For: Arial Unicode ms, 9pt Orange Demo Co 23 Man Street Control Cty
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	Psyment advice cut-away     Currency conversion as a single tax total     Logo     Decourt
	Headings: DRAFT INVOICE, TAX INVOICE, TAX INVOICE, CREDIT NOTE, STATEMENT, DRAFT PURCHASE ORDER, PURCHASE ORDER, DRAFT QUOTE, QUOTE, REMITTANCE ADVICE, RECEIPT
	Prymetr tervice: democi@ienxx.co Terms & Peymetr Advic.[Invice and Editationent]; When paying by chaque, please complete this paymet advice, detach and post to the address provided. Online paymetry preferred -use car account of 04000-7006591-00 or use the Tays online nowil ink to pay via TayPdI with your
5	
5	NAME YOUR BRANDING THEME
	invoice templates, add your logo and select which
	a invoice templates, and your logo and select which
	ur help New Branding Theme ×
	Your title for the new Branding Theme
	e.g. Custom Terms
	Settings OK Cancel
	n Address Padding: 1.00 cm Contact Details
	Uint, We Decommend use of the word (Custors) to help you identify later that this is different to
	Hint: We Recommend use of the word 'Custom' to help you identify later that this is different to the 'Standard' default Xero theme
6	
6	OPEN THE QUOTE CUSTOM.DOCX WORD TEMPLATE PROVIDED TO YOU IN YOUR TRADIE TERMS
	DOWNLOAD LINK AND CLICK <u>ENABLE EDITING</u>
	the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing
	"Insert logo here"
	«INVOICETITLE»       Date     •OrganisationNames       •InvoiceDates     •OrganisationNames       •organisationNames     •OrganisationNames
	«ContactNotalAddress»     Expiry       «ContactPostalAddress»     «Expiry Date»       «ContactTopUparkame» «ContactTopUmber»
	Account Number «ContectAccountNumbe r»
	Quote Number «InvoiceNumber»
	Reference aReference>
	« Organisation TaxOlopia yName = «Organisation TaxOlopiay
	Number» «Quote Title»
	«Summary»
	Amount Description Quantity Unit Price «TaxUnitName «InvoiceCurren » Sys
	«TableStartLineiten»/ItemCode», «Custiline disidemente «TarPercentage disidemente»
	«Description» «Quantity» «Onitorinounte» OriName» autocholumenten »
	simolessubtotal
	Subbotal «InvoiceSubTotal » nateriora TatoCode» «TatoCode» «TatoCode» and

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" CINTECETITLE «ContactName» «ContactName» «ContactPostalAddress» «ContactTaxDisplayName» «ContactTaxNumber»				
8	NOW GO BACK TO THE SETTINGS AREA IN XERO				
	Invoice       Credit Note       Statement       Purchase Order       Quote       Image: DRAFT INVOICE. TAX INVOICE. TAX INVOICE. CREDIT NOTE, STATEMENT, DRAFT PURCHASE ORDER, PURCHASE CREDER, DRAFT QUOTE. QUOTE       Upload random r				
9	CLICK 'UPLOAD' TO ENABLE YOU TO SELECT YOUR TRADIE TERMS CUSTOMISED XERO QUOTE				
	CUSTOM.DOCX TEMPLATE				

10	SELECT YOUR SAVED TRADIE TERMS CUSTOMISED QUOTE TEMPLATE FROM YOUR DOWNLOADS AREA (OR WHEREVER YOU HAVE SAVED IT SAFELY)		
	Upload .docx Templates ×		
	Upload one or more templates. Each file can be no larger than 1MB. Invoice Browse No file selected Quete Browse Quote.docx Credit Note Browse No file selected Select your saved		
	Statement         customised quote           Browse         No file selected		
	Purchase Order Browse No file selected		
	Upload Cancel		
11	THIS MESSAGE WILL APPEAR TO CONFIRM YOU HAVE UPLOADED YOUR NEW CUSTOM QUOTE		
	Your templates were uploaded to the e.g. Custom Terms theme		
	What's this? 🦻		
	New Branding Theme		
12	NOW THE NEXT STEP IS TO CHECK THAT THE UPLOAD HAS WORKED		
	GO TO QUOTE TAB IN BUSINESS TAB ← Oo back to last organization		
	Deno Company (N2) + Dashbeart Business Accounting Payroll Projects Contacts + Q A 0 500		
	Basic service     Out       Business snapshot     Business snapshot       Draft     End		
	Experime         Experime         Counter number         Reference         Tame           Experime         Counter         7 au 221         •         0.0.001         TO DEXO         •           Sales convriew         Sales convriew         Family         TO DEXO         •         TO DEXO         •		
	Tite CLIEN Bills to pay E TYPE   ADDRESS		
	Trains you for " he are defined you have effected us to " and the area of the		
	This Ducket had Services within a gives any assessments mode during any within the service of the services of		
	The bit oconset estimate of the second estima		
13	CREATE A DRAFT QUOTE – WATCH THIS VIDEO ON HOW TO DO THIS OR FOLLOW THE STEPS		
	BELOW		
	Sales overview >		
	Quotes		

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		
	Sates overview > Quotes > New Quote		
	Create		
	Customer Date Expiry Quote number Reference Theme		
	+ Add a Title & Summary Special Projects		
	NZD New Zealand Dollar     Standard       Item     Description     Quantity     Unit price     Disc %     Account     Tax rate     Region		
	Image: Second and the second and t		
	eg. 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			
	QU-0002 a SAMPLE CUSTOMER		
	QU-0001 SAMPLE CUSTOMER CLIENT NAME   SERVICE TYPE   ADDRESS		
16	OPEN THE DRAFT QUOTE AND SELECT PRINT		
	Sales overview > Cuoles > Quote QU-0002		
	Draft Send Print C Options -		
	Customer Date Expiry Quote number Reference Theme		
	SAMPLE CUSTOMER     16 Jun 2021     •     •     QU-0002     Standard       + Add a Tifle & Summary		
17	SELECT PRINT		

18	Quantity       Unit price       Disc %       Account       Tax rate       Reg         Print       Quantity       QUantity       Unit price       Disc %       Account       Tax rate       Reg         Print       Quantity       Quantity       Unit price       Disc %       Account       Tax rate       Reg         Print       Quantity       Quantity       Unit price       Disc %       Account       Tax rate       Reg         Print       Cancel       Subtotal       Total       Total       Total         OPEN THE PDF       IT SHOULD SHOW YOU THE NEW CUSTOM TEXT	T THAT YOU HAVE 'EMBEDDED' PERMANENTLY	
	INTO YOUR CUSTOM THEME QUOTE TEMPLATE		
	↓↓↓ Tradieterms DEMO	Description Quantity Unit Price GST Amount NZD Solbstral 0.00	
	DRAFT QUOTE Dawn 1021 Dawn Company (M2) 23 Main Street Central City	IMPORTANT INFORMATION URTERMS OF TRADE   By confirming your acceptance, you are also agreeing to our standard terms of trade. These apply in addition to any project specific exclusions noted aboxe. You can find our standard terms of trade over the page. Release read these carefully as they form the contract between us. ACCEPTANCE OF THIS QUOTE   Please ensure you click the link supplied in your email to accept this Quote or reply by email confirming your acceptance. Thank you for choosing us for your project. We're looking forward to helping you. ""most if you are a lecreed building practitioner issuing a quote or cost estimate for residential building works over \$10,000"*	
	Determine Text IS EMBEDDED, SUCCESSI DOLARE ADVISING YOUR CLEANT WHERE TO LOCATE YOUR TERMS OF TRADE         Determine Text IS EMBEDDED, SUCCESSI TOTAL RED       State IS State	TEMES OF TRADE VICE TERMS OF TRADE VICE SHOWNER, SHOWNER	
19	TO ADD CUSTOMISED TEXT FOR SPECIFIC CUSTOMERS Once you have created your custom theme template Quote, you will need to add <i>specific</i> information into quotes/estimates.		
	This includes:		
	<ul> <li>Payment Breakdowns</li> <li>Confirmation if the price is Cost Estimate Only or Fixed Price</li> <li>Specific exclusions that may not be covered in your Terms of Trade</li> </ul>		
	VIEW THIS VIDEO (13 MINS) ON HOW TO ADD SUMMARY FIELDS IN A XERO QUOTE	IN CUSTOMISED WORDING USING THE TITLE +	

#### END OF PROCEDURE

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