



# HELPSHEET: XERO

## USING CUSTOM BRANDING THEME TEMPLATES TO ADD TERMS OF TRADE TO QUOTES/ESTIMATES

**Country: All**

### Purpose

In this help sheet we provide a step by step guide to adding your terms of trade to the back pages of a Quote or Estimate issued in Xero by creating a **custom theme template** that allows you to **embed the terms of trade** onto the back pages.

### 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.
- There are a few ways that your customers can accept your terms of trade:
  - 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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Xero issued procedures are also available at [www.xero.com](http://www.xero.com).

- Your invoices should refer back to your terms of trade and include key reminders about your rights to collect fees for late payment.

## Getting Started

You will need to **download** the Xero software **Custom Theme Word Templates**.

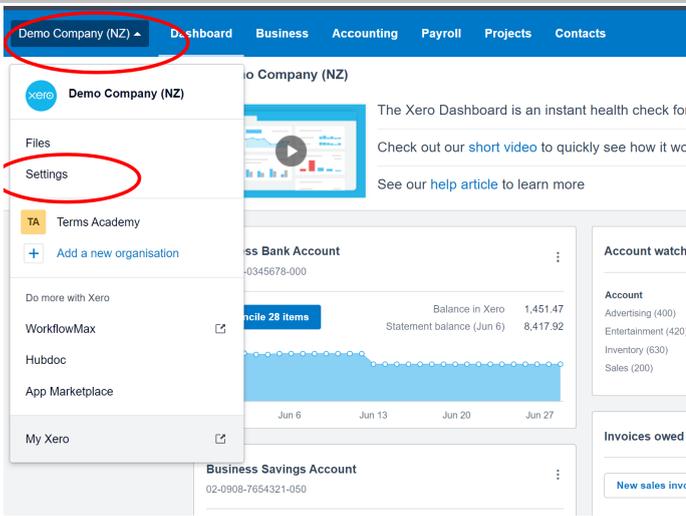
Be ready to create a folder to store your new downloads to.

## Steps to Follow

**XERO ARTICLES:** [View article here](#) on using Custom Docx Templates

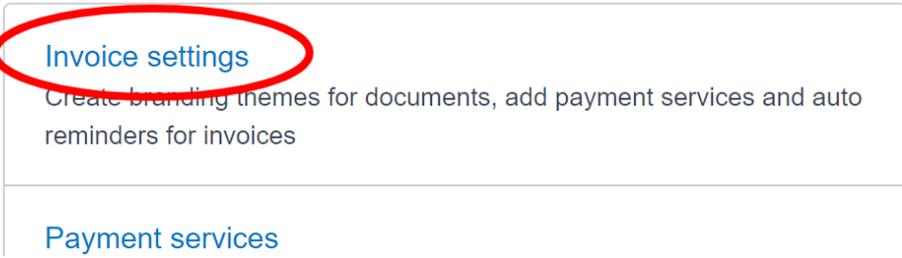
**WATCH WITH TRADIE TERMS :** View Video Tutorial from Tradie Terms [here](#) on how to follow the steps below (10 min watch)

**GO TO SETTINGS IN YOUR COMPANY INFORMATION IN TOP LEFT OF YOUR XERO DASHBOARD.**



The screenshot shows the Xero dashboard for 'Demo Company (NZ)'. The top navigation bar includes 'Dashboard', 'Business', 'Accounting', 'Payroll', 'Projects', and 'Contacts'. A dropdown menu is open from the 'Demo Company (NZ)' link, with 'Settings' highlighted. The main dashboard area shows account balances and a chart.

**SELECT INVOICE SETTINGS**



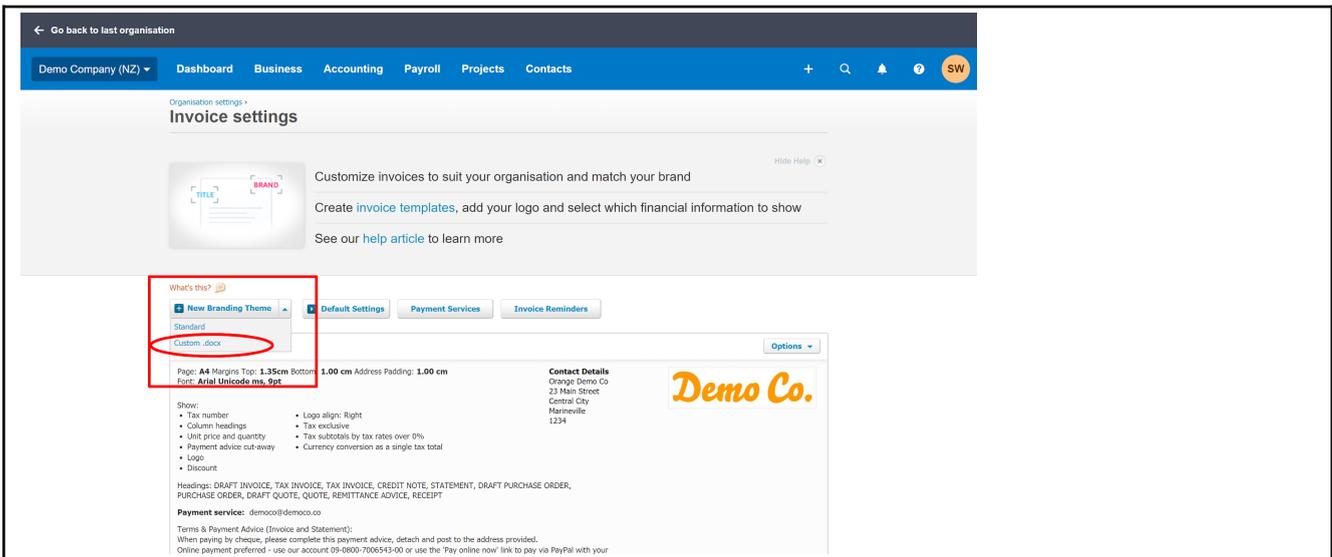
The screenshot shows the 'Invoice settings' page. The 'Invoice settings' option is highlighted with a red circle. Below it, there is a description: 'Create branding themes for documents, add payment services and auto reminders for invoices'. There is also a 'Payment services' link.

**SELECT CUSTOM BRANDING THEME**

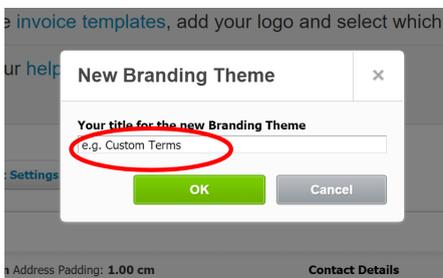
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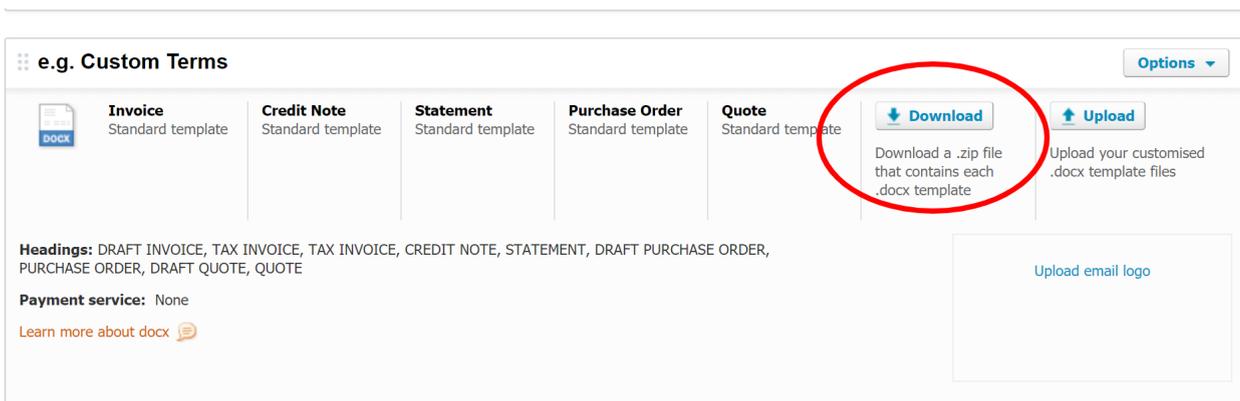


## NAME YOUR BRANDING THEME



**Hint: We Recommend use of the words Terms or T&Cs in your name to help you identify later that this is different to the 'Standard' default Xero theme**

## SELECT DOWNLOAD THE CUSTOM.DOCX TEMPLATES FROM THE XERO MENU

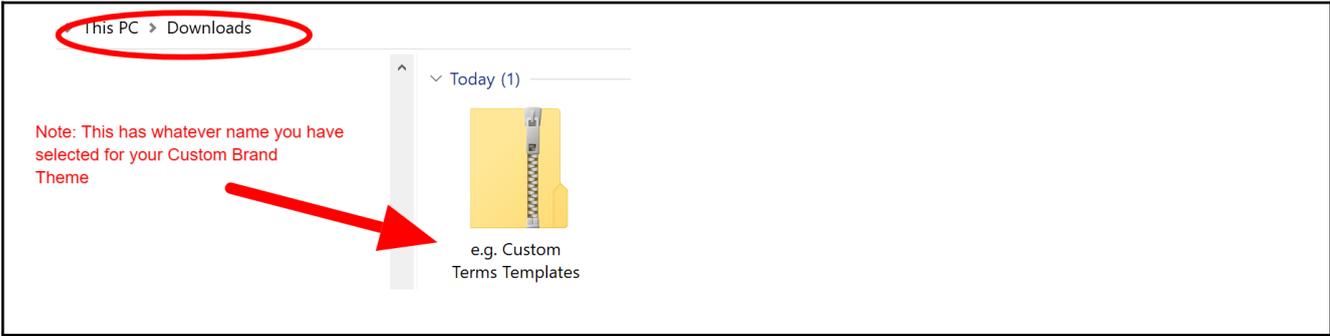


## OPEN THE ZIPPED FOLDER FROM YOUR DOWNLOADS AREA OF YOUR PC (OR MAC)

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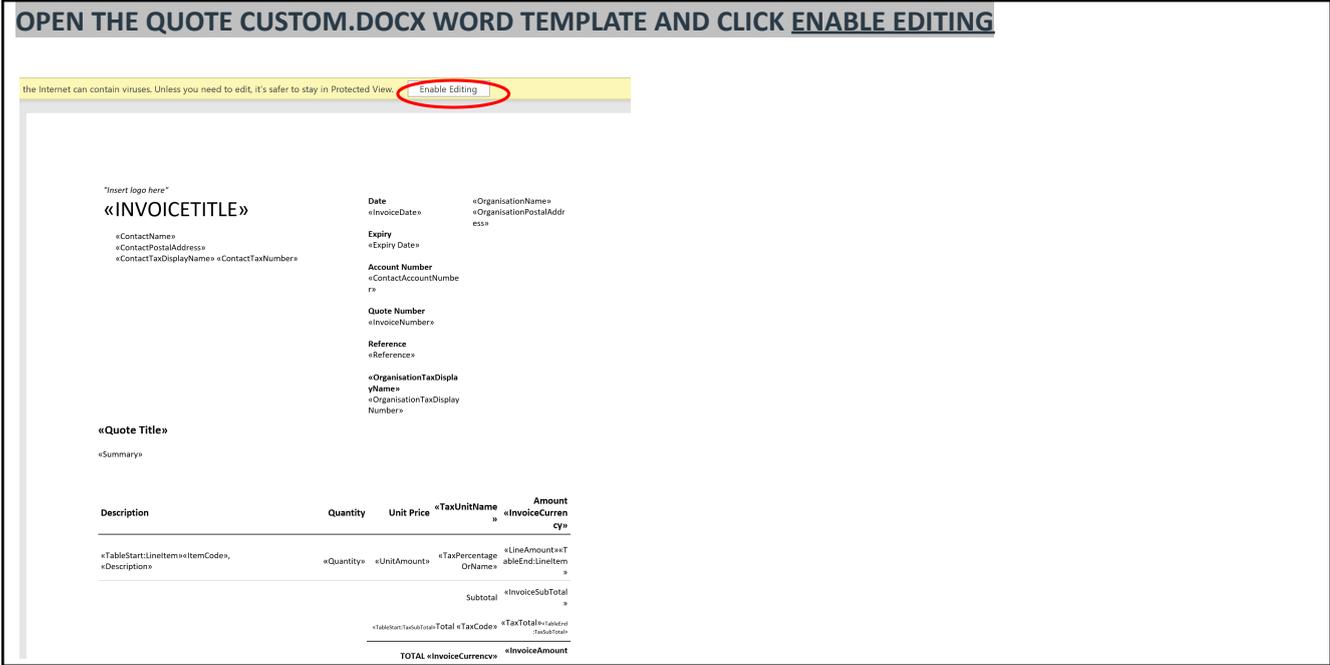
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**EXTRACT THE QUOTE CUSTOM.DOCX WORD TEMPLATE**

CreditNote	Microsoft Word Document
Invoice	Microsoft Word Document
PurchaseOrder	Microsoft Word Document
<b>Quote</b>	Microsoft Word Document
Statement	Microsoft Word Document



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## INSERT YOUR BUSINESS LOGO

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»

## SCROLL DOWN TO TERMS SECTION AT THE BOTTOM OF YOUR QUOTE CUSTOM.DOCX WORD TEMPLATE

**Terms**

«Terms»

## DELETE THE 'TERMS' WORDING IN BOLD (CIRCLED ABOVE)

«Terms»

## COPY THE TRADIE TERMS RECOMMENDED CUSTOM WORDING BELOW AND PASTE THIS INTO THE SAME AREA THAT YOU DELETED THE <<TERMS>> WORDING

*Hint: Delete any extra carriage returns (spaces between lines) to get the text looking neat and together.*

### IMPORTANT INFORMATION | PLEASE READ

**TERMS OF TRADE APPLY:** This quote/cost estimate and our accompanying terms of trade (see overleaf) are accepted by you when you click any link to confirm acceptance, reply to confirm acceptance by email, issue a purchase order to us or accept our personnel onto your Site.

**Thank you for the opportunity. We're looking forward to helping you.**

**Note: You can add additional text as required.**

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**DELETE THE XERO PLACEHOLDER <<TEXT>>**

**ACCEPTANCE OF THIS QUOTE** | Please ensure by email confirming your acceptance.

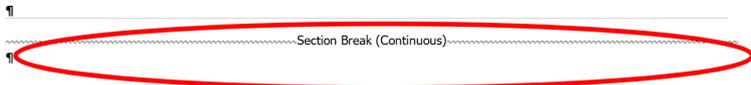
**Thank you for choosing us for your project.** 



Delete this placeholder field

**INSERT A CONTINUOUS SECTION BREAK IN THE SAME PLACE (this is important so that your terms of trade can be added in columns)**

Thank-you-for-choosing-us-for-your-project.-We're-looking-forward-to-helping-you.¶



**OPEN YOUR TRADIE TERMS OF TRADE WORD DOCUMENT FROM YOUR TRADIE TERMS DOWNLOAD LINK**

<p><b>TERMS OF TRADE</b></p> <ol style="list-style-type: none"><li><b>How these terms apply</b> These terms of trade are to be read together with any specific exclusions listed in our Quote, the invoice payment terms on your invoice and any special terms we may state in your Quote.</li><li><b>Our Contract</b> Your acceptance of the Quote and these general Terms of Trade together constitute our agreement with you (the Contract). This Contract governs the agreement between XXX Limited (Company Number XXX) of Registered Address XXX (Us) and you, the named customer in the Quote, in respect of the Services.</li><li>Any reference to 'us' in these Terms includes any contractor, employee, assignee, transferees or approved subcontractor that we use.</li><li>All plans and specifications accompanying these terms, including any variations to such plans and specifications, form part of this Contract.</li></ol> <p><b>SERVICES WE WILL SUPPLY TO YOU</b></p> <ol style="list-style-type: none"><li><b>Services</b> Your customised terms of trade will be <a href="#">here</a></li><li><b>Custom Design</b> Your customised terms of trade will be <a href="#">here</a></li><li><b>Subcontractors</b> Your customised terms of trade will be <a href="#">here</a>.</li><li><b>Exclusions</b> Your customised terms of trade will be <a href="#">here</a>.</li></ol> <p><b>YOUR OBLIGATIONS TO US</b></p> <ol style="list-style-type: none"><li><b>Pre-Site Works</b> Your customised terms of trade will be <a href="#">here</a>.</li><li><b>Payment of Charges</b> Your customised terms of trade will be <a href="#">here</a>.</li><li><b>Progress Payments</b> Your customised terms of trade will be <a href="#">here</a>.</li><li><b>Scope Changes to a minimum</b> Your customised terms of trade will be <a href="#">here</a>.</li></ol> <p><b>OUR OBLIGATIONS TO YOU</b></p> <ol style="list-style-type: none"><li><b>Custom Design</b> Your customised terms of trade will be <a href="#">here</a>.</li></ol>	<p><b>COST ESTIMATES</b></p> <ol style="list-style-type: none"><li><b>All Quotes supplied as a Cost Estimate by Default</b> Your customised terms of trade will be <a href="#">here</a>.</li><li><b>Additional labour hours requests are subject to a Variation Order</b> Your customised terms of trade will be <a href="#">here</a>.</li></ol> <p><b>VARIATIONS</b></p> <ol style="list-style-type: none"><li><b>Variations to Total Price or Time</b> We reserve the right to issue a Variation Order to change the Total Price or extend the time to complete the Services in the following circumstances:<ol style="list-style-type: none"><li>Customised to your trade; and/or</li><li>Customised to your trade; and/or</li><li>Customised to your trade; and/or</li><li>Customised to your trade; and/or</li><li>increases to us for the cost of labour or materials Customised to your Trade; and/or</li><li>Customised to your Trade.</li></ol></li><li><b>All rights reserved to decline a Variation</b> Custom Terms of Trade will be <a href="#">here</a>.</li><li><b>How we will confirm a Variation</b> Your customised terms of trade will be <a href="#">here</a>.</li><li><b>Continuation of Services during discovery of a Variation</b> Your customised terms of trade will be <a href="#">here</a>.</li><li><b>How we will confirm a Variation if we need to continue the works that day</b> Your customised terms of trade will be <a href="#">here</a>.</li><li><b>When Time &amp; Materials applies for Variations</b> Your customised terms of trade will be <a href="#">here</a>.</li></ol> <p><b>CONSENTS</b></p> <ol style="list-style-type: none"><li><b>Consents, approvals or compliance certificates</b> You must make your own enquiries regarding any local or regional authority approvals or consents for the Services.</li></ol>
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**SELECT ALL TEXT AND COPY ALL (PC: Ctrl + A or a Mac Command + A)**

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**TERMS OF TRADE**

- How these terms apply** These terms of trade are to be read together with any specific exclusions listed in our Quote, the invoice payment terms on your invoice and any special terms we may state in your Quote.
- Our Contract** Your acceptance of the Quote and these general Terms of Trade together constitute our agreement with you (the Contract). This Contract governs the agreement between **XXX Limited (Company Number XXX) of Registered Address XXX (Us)** and you, the named customer in the Quote, in respect of the Services.
- Any reference to 'us' in these Terms includes any contractor, employee, assignee, transferees or approved subcontractor that we use.
- All plans and specifications accompanying these terms, including any variations to such plans and specifications, form part of this Contract.

**SERVICES WE WILL SUPPLY TO YOU**

- Services** Your customised terms of trade will be [here](#)
- Custom Design** Your customised terms of trade will be [here](#)
- Subcontractors** Your customised terms of trade will be

**COST ESTIMATES**

- All Quotes supplied** customised terms of
- Additional labour hours** **Variation Order** You here.

**VARIATIONS**

- Variations to Total** issue a Variation Order extend the time to circumstances:
  - Customised to
  - Customised to
  - Customised to
  - Customised to
  - increases to u
  - Customised to
- All rights reserved** of Trade will be her

**SELECT ALL TEXT**

**PASTE BELOW THE CONTINUOUS SECTION BREAK**

¶

-----Section Break (Continuous)-----

\*RegisteredOffice\*

¶

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¶

**INSERT BELOW THE SECTION BREAK**

¶

**TERMS-OF-TRADE¶**

- **How these terms apply** These terms of trade are to be read together with any specific exclusions listed in our Quote, the invoice payment terms on your invoice and any special terms we may state in your Quote.¶
- **Our Contract** Your acceptance of the Quote and these general Terms of Trade together constitute our agreement with you (the Contract). This Contract governs the agreement between **XXX Limited (Company Number XXX) of Registered Address XXX (Us)** and you, the named customer in the Quote, in respect of the Services.¶

¶

**COST-ESTIMATES¶**

- **All Quotes supplied as a Cost Estimate by Default** Your customised terms of trade will be here.¶
- **Additional Labour hours requests are subject to a Variation Order** Your customised terms of trade will be here.¶

¶

**VARIATIONS¶**

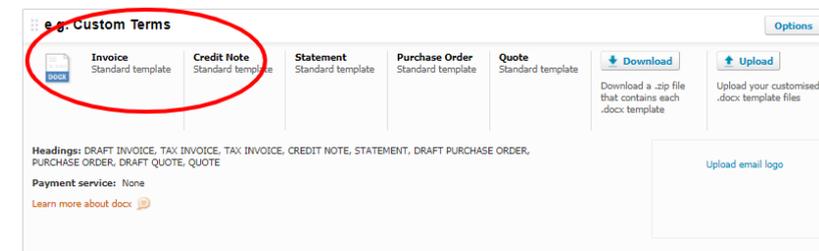
- **Variations to Total Price or Time** We reserve the right to issue a Variation Order to change the Total Price or

**TROUBLESHOOTING: If the text does not show up in two columns>select all text> go to Word Ribbon>Select Layout>Select Columns>Select Two**

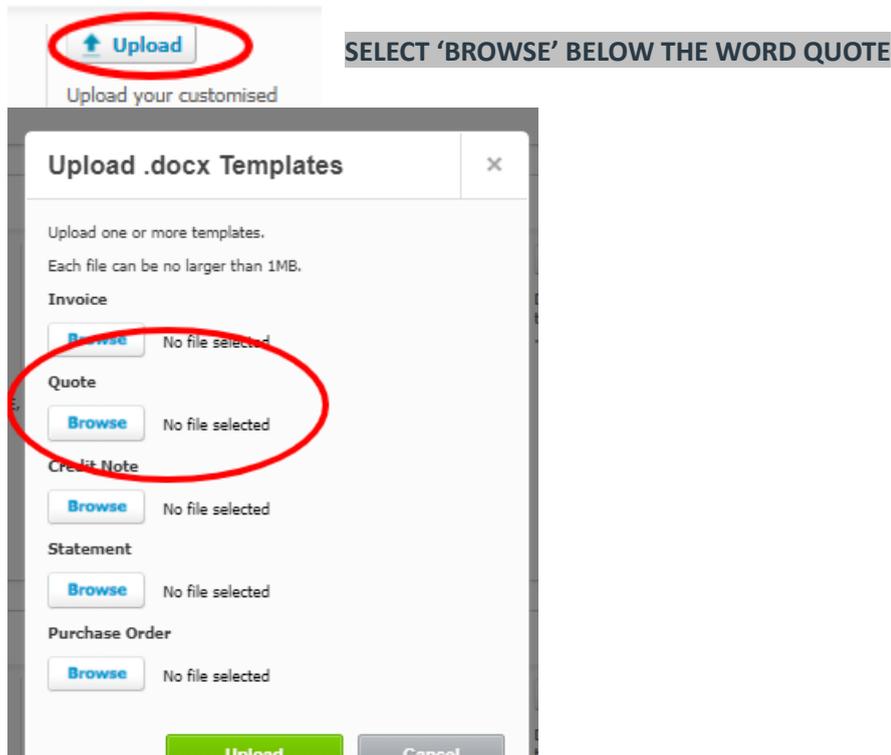


**YOU HAVE NOW COMPLETED THE CUSTOMISATION TO YOUR CUSTOM.DOCX TEMPLATE**

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



**CLICK 'UPLOAD' TO ENABLE YOU TO SELECT YOUR NEWLY CREATED AND CUSTOMISED XERO CUSTOM.DOCX TEMPLATE**



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**SELECT YOUR SAVED 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

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

✓ Your templates were uploaded to the e.g. Custom Terms theme

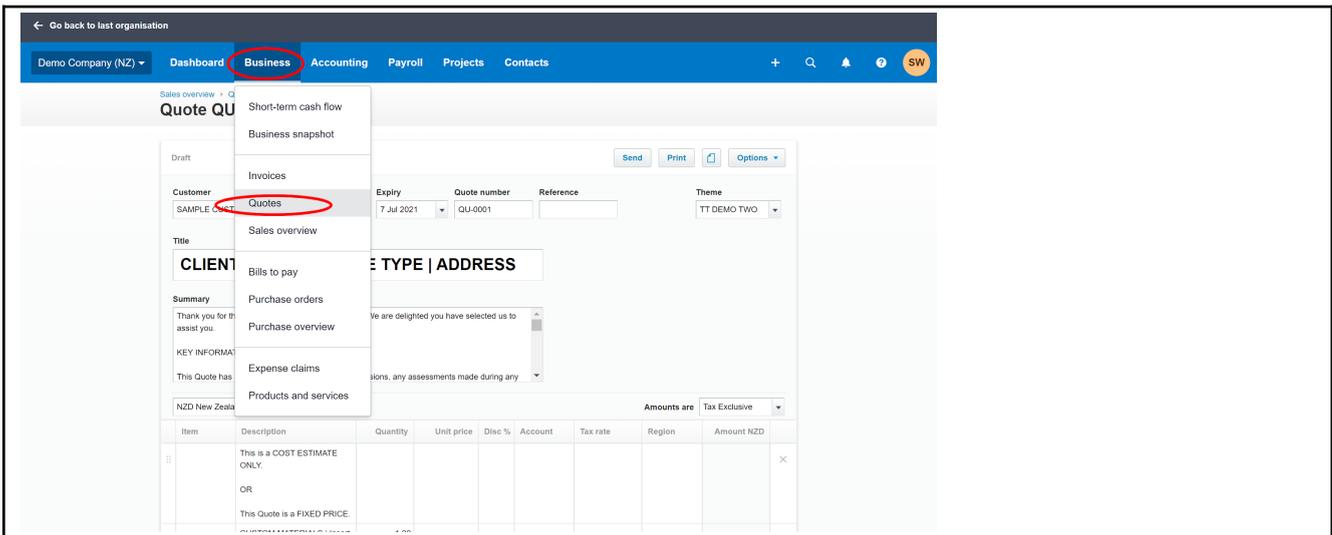
What's this? [?]

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

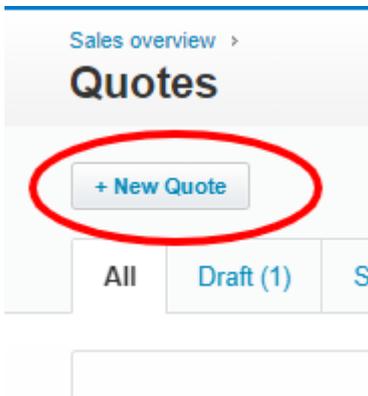
**SUCCESSFULLY!**

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

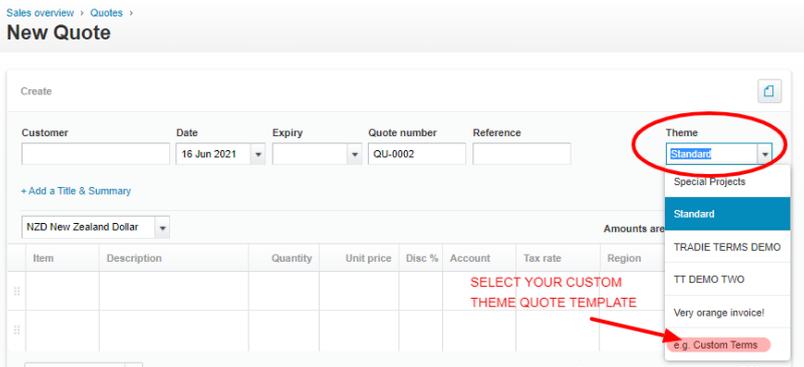
**GO TO QUOTE TAB IN BUSINESS TAB**



**CREATE A DRAFT QUOTE**



**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**



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### 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)

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

### OPEN THE DRAFT QUOTE AND SELECT PRINT

Sales overview > Quotes >

#### Quote QU-0002

Draft

Send Print Options

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

+ Add a Title & Summary

### SELECT PRINT

Print Quote QU-0002 as a PDF

Print

Cancel

### OPEN THE PDF

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

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## DRAFT QUOTE

SAMPLE CUSTOMER

Date  
16 Jun 2021

Expiry

Account Number

Quote Number  
QU-0004

Reference

GST Number  
111-111-111

Demo Company (NZ)  
23 Main Street  
Central City  
Marineville 1234

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

Description	Quantity	Unit Price	GST	Amount NZD
			Subtotal	0.00
			<b>TOTAL NZD</b>	<b>0.00</b>

### IMPORTANT INFORMATION

**OUR TERMS 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 above. You can find our standard terms of trade over the page. Please 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.

**\*\*Insert if you are a licensed building practitioner issuing a quote or cost estimate for residential building works over \$36,000\*\***

Registered Office: 23 Main Street, Central City, Marineville, 1234

Description	Quantity	Unit Price	GST	Amount NZD
				Subtotal 0.00
				<b>TOTAL NZD 0.00</b>

**IMPORTANT INFORMATION**

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**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.**

**\*\*Insert if you are a licensed building practitioner issuing a quote or cost estimate for residential building works over \$30,000\*\***

Registered Office: 23 Main Street, Central City, Manneville, 1234

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

<p><b>TERMS OF TRADE</b></p> <p>1. <b>How these terms apply</b> These terms of trade are to be read together with any specific exclusions listed in our Quote, the invoice payment terms on your invoice and any special terms we may state in your Quote.</p> <p>2. <b>Our Contract</b> Your acceptance of the Quote and these general Terms of Trade together constitute our agreement with you (the Contract). This Contract governs the agreement between <b>XXX Limited</b> (Company Number <b>1234</b> of Registered Address <b>XXX (Us)</b> and you, the named customer in the Quote, in respect of the Services.</p> <p>3. Any references to 'us' in these Terms includes any contractor, employee, assignee, transferee or approved subcontractor that we use.</p> <p>4. All plans and specifications accompanying these terms, including any variations to such plans and specifications, form part of this Contract.</p>	<p>changes to a minimum to limit any disappointment if we cannot extend your job to meet these change requests.</p> <p><b>OUR OBLIGATIONS TO YOU</b></p> <p>13. <b>Services</b> We will perform the Services to accepted industry standards including, where applicable, under the Building Act 2004 and the Health and Safety at Work Act 2015.</p> <p>14. <b>Certificate of completion and Records of Work</b> If required by law, we will give you any certificate, record or work or similar document as required at law to confirm the works are completed.</p> <p>15. <b>Updates on timing</b> We will advise you of any anticipated delay to provide a Service. In the event that the Services are not completed by the anticipated or proposed date advised by us, you acknowledge and agree that you shall not be entitled to any damages (liquidated damages, or any other type of damages or costs) in respect of the</p>	<p>you on into yo</p> <p><b>COST ESTIP</b></p> <p>21. All Qu our Qu our Qu specifi of labo of wor only ar hours : 22. Additio Variati by you than in the cla these :</p>
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END OF HELP SHEET

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