



HELPSHEET: HOW TO ADD URL TO YOUR TERMS OF TRADE TO YOUR XERO QUOTE FOOTER TEXT

Country: All

Purpose

In this help sheet we provide a step by step guide to adding a **website URL** that links to your terms of trade page on your website to the **footer text of your Xero Quotes and Invoices**.

This helpsheet applies if you have your terms of trade added as a page to your website.

Key Information

- Terms of Trade must be **offered to your customers/clients** at the time they place an order or you issue a quote/cost estimate .
- Your quotes can include the website URL to your terms of trade using the footer text supplied in this guide.
- Your invoices should refer back to your terms of trade and include key reminders about your rights to collect fees for late payment.

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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.

HOW TO ADD A LINK TO YOUR ONLINE TERMS OF TRADE TO XERO QUOTES + INVOICES

Key Information

If you publish your terms of trade to your **website** use this option.

The Xero software offers you a way to add custom footer wording to your **Xero Quotes** and **Invoices** using the Xero **Invoice Settings**.

Where your **terms of engagement** are published to your website as a **webpage** with its own URL (website address) you can add the **URL address** to the **footer text** inside your Quotes and Invoices to enable your customers to **view and read** terms of trade **before** they confirm acceptance.

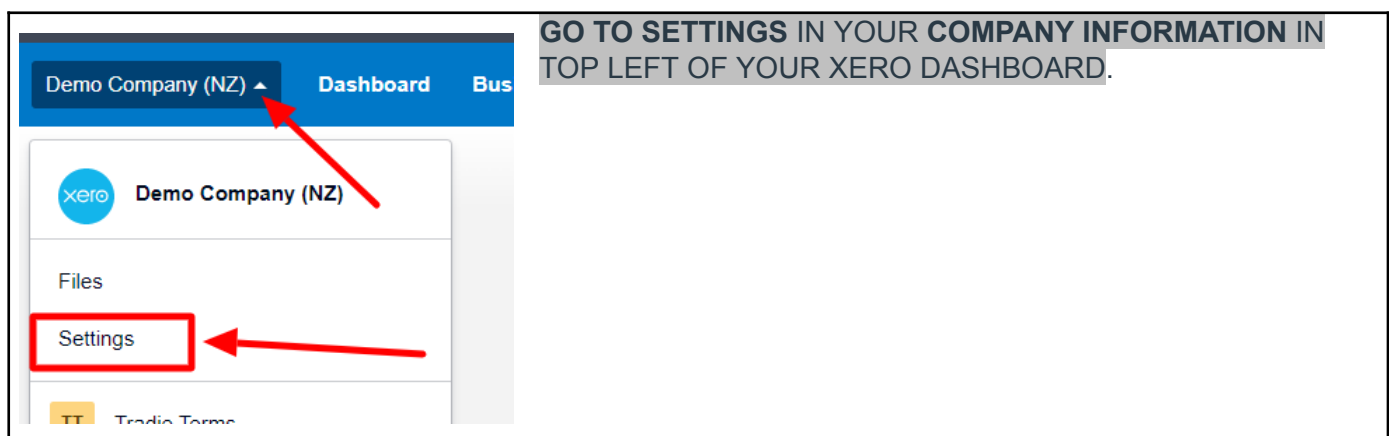
We provide you with sample wording to add to **the footer section** of your Xero **Default Quote and Default Invoice Footers** to confirm your terms are **accepted** with your quotes/estimates.

Steps to Follow

XERO ARTICLES: View [article](#) here on editing your Standard Branding Themes in Xero

WATCH WITH TRADIE TERMS : [View Video Tutorial from Tradie Terms here](#) on how to follow the steps below (7 min watch)

IMPORTANT NOTE: You must already have your terms of trade loaded to your website in advance. [View our Help Sheet on how to do this.](#)



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SELECT INVOICE SETTINGS

Features

Invoice settings
Create branding themes for documents, add payment services and auto reminders for invoices

Payment services

SELECT YOUR STANDARD THEME AND CLICK ON OPTIONS > SELECT EDIT

What's this?

New Branding Theme | **Default Settings** | **Payment Services** | **Invoice Reminders**

Standard **Options** ▾

Page: **AV** Margins: Top: **1.35cm** Bottom: **1.00 cm** Address Padding: **1.00 cm**
Font: **Arial Unicode ms, 9pt**

Contact Details
Orange Demo Co
23 Main Street
Central City
Martineville
1234

Show:

- Tax number
- Column headings
- Unit price and quantity
- Payment advice cut-away
- Logo
- Discount
- Logo align: Right
- Tax exclusive
- Tax subtotals by tax rates over 0%
- Currency conversion as a single tax total

Headings: DRAFT INVOICE, TAX INVOICE, TAX INVOICE, CREDIT NOTE, STATEMENT, DRAFT PURCHASE ORDER, PURCHASE ORDER, DRAFT QUOTE, QUOTE, REMITTANCE ADVICE, RECEIPT

Payment service: democo@democo.co

Terms & Payment Advice (Invoice and Statement):
When paying by cheque, please complete this payment advice, detach and post to the address provided.
Online payment preferred - use our account 09-0800-7006543-00 or use the 'Pay online now' link to pay via PayPal with your credit card.

Terms (Quotes):
(None added)

Demo C

Options ▾

- Edit**
- Copy
- Change Logo
- Delete
- Preview
- Remove logo

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Edit Branding Theme ✕

Name

Page size A4 US Letter

Top margin Measure in cm inches

Bottom margin

Address padding

Font

Font size

Draft Invoice title

Approved Invoice title

Overdue Invoice title

Credit Note title

Statement title

Draft Purchase Order title

Purchase Order title

Draft Quote title

Quote title

Remittance Advice title

Receipt title

Show tax number

Show column headings

Show item code

Show unit price & quantity

Show payment advice cut-away

Show tax column

Show registered address

Show logo

Hide Discount

Show Contact Account Number

Show tax subtotals by

Show currency conversion as

Payment Services (Credit Card)

Payment Services (PayPal)

Payment Services (Direct Debit)

Logo alignment Left Centre Right

Show taxes as Exclusive Inclusive

Enter your contact details as they should appear at the top of all PDFs you print or send

Orange Demo Co
23 Main Street
Central City
Marineville
1234

Terms & Payment Advice (Invoice and Statement)

When paying by cheque, please complete this payment advice, detach and post to the address provided.
Online payment preferred - use our account 09-0800-7006543-00 or use the 'Pay online now' link to pay via PayPal with your credit card.

Terms (Quotes)

COPY AND PASTE THE TEXT BELOW INTO THE 'Terms (Quotes)' SECTION

IMPORTANT NOTE: You must already have your terms of trade loaded to your website in advance. [View our Help Sheet on how to do this.](#)

IMPORTANT INFORMATION | PLEASE READ

TERMS OF TRADE: Our terms of trade are located at {insert your URL e.g. www.website.com/terms-of-trade}. These terms are accepted by you when you click any link supplied to confirm acceptance, reply to confirm acceptance of our Services by email, pay a deposit, issue a purchase order to us or otherwise accept our Services. These terms shall apply to all current and future Services supplied by us.

INSERT THE TEXT BELOW TO THE 'Terms & Payment Advice (Invoice and Statement)' SECTION

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HINT: IF YOU ALREADY HAVE TEXT THAT REFERS TO OVERDUE CHARGES OR LATE PAYMENT FEES, REPLACE THIS WITH OUR RECOMMENDED TEXT TO AVOID CONFUSING YOUR CUSTOMERS

THANK YOU FOR CHOOSING US

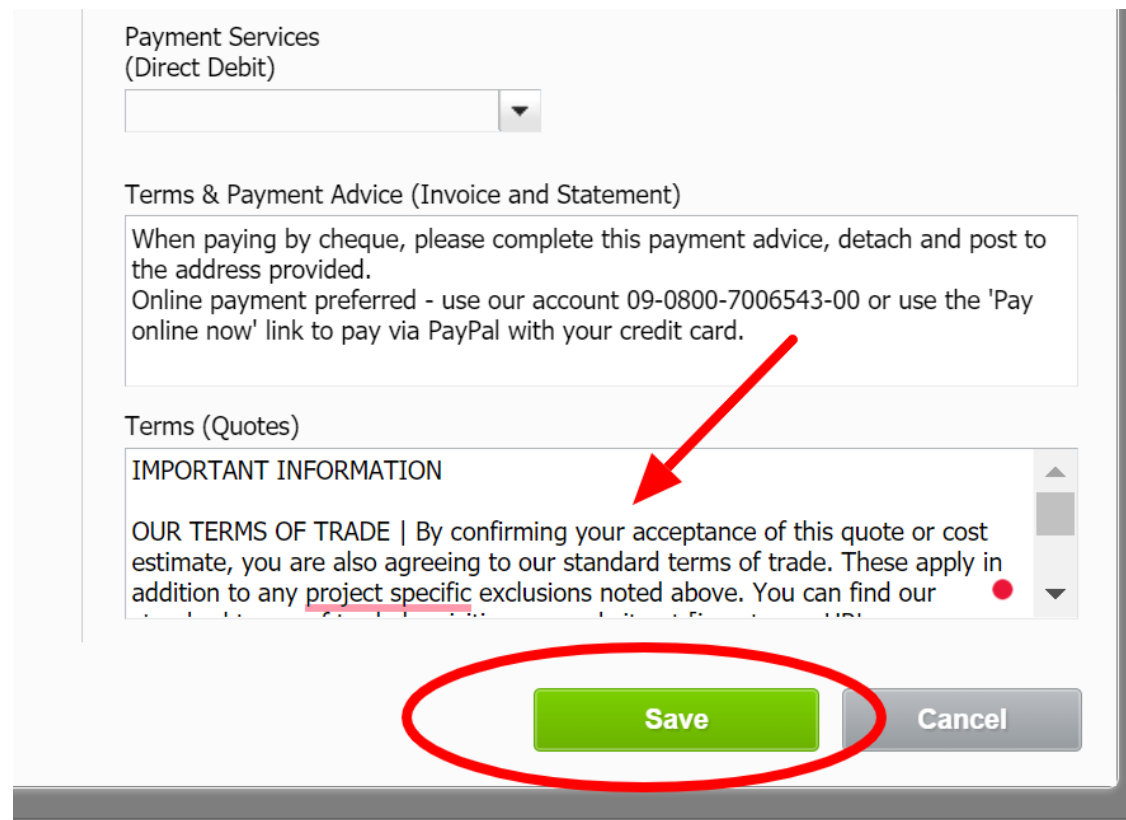
We thank you in advance for your prompt payment.

DIRECT CREDITS: Please pay into account number xx-xxxx-xxxxx and quote your invoice number as a reference.

ONLINE PAYMENTS: Please use the 'Pay online now' link to pay via PayPal or with your credit/debit card.

LATE OR OVERDUE PAYMENTS: Please be aware that late or overdue payments may incur default interest at our published rates located in our Terms of Engagement. Cost recovery fees and expenses may also apply. For further information, please refer to our terms of trade {located at www.yourwebsite.com/terms-of-trade} which were accepted by you at the time of placing an order or booking our Services!.

CLICK SAVE



The screenshot shows a form titled 'Payment Services (Direct Debit)'. It includes a dropdown menu, a section for 'Terms & Payment Advice (Invoice and Statement)' with instructions on cheque and online payments, and a section for 'Terms (Quotes)' containing 'IMPORTANT INFORMATION' and a paragraph about terms of trade. A red arrow points to the 'Terms (Quotes)' section, and a red oval highlights the 'Save' button at the bottom.

YOU CAN CHECK THAT YOUR NEW TEXT IS SAVED HERE

✓ Your changes to Standard were saved.

What's this?

- New Branding Theme
- Default Settings
- Payment Services
- Invoice Reminders

Standard Options

Page: A4 Margins Top: 1.35 cm Bottom: 1.00 cm Address Padding: 1.00 cm
Font: Arial Unicode ms, 9pt

Contact Details
Orange Demo Co
23 Main Street
Central City
Marineville
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Demo Co.

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- Unit price and quantity
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- Discount
- Logo align: Right
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Headings: DRAFT INVOICE, TAX INVOICE, TAX INVOICE, CREDIT NOTE, STATEMENT, DRAFT PURCHASE ORDER, PURCHASE ORDER, DRAFT QUOTE, QUOTE, REMITTANCE ADVICE, RECEIPT

Payment service: democco@democco.co

Terms & Payment Advice (Invoice and Statement):
When paying by cheque, please complete this payment advice, detach and post to the address provided.
Online payment preferred - use our account 09-8800-7006543-00 or use the 'Pay online now' link to pay via PayPal with your credit card.

Terms (Quotes):
IMPORTANT INFORMATION

OUR TERMS OF TRADE | By confirming your acceptance of this quote or cost estimate, 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

TO SEE HOW IT LOOKS ON A SAMPLE QUOTE GO TO BUSINESS TAB – QUOTE

rd **Business** Accounting

Organ
Inv

- Short-term cash flow
- Business snapshot
- Invoices
- Quotes**
- Sales overview
- Bills to pay
- Purchase orders
- Purchase overview

SELECT NEW QUOTE


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sales overview > Quotes >

New Quote

Create 

Customer: [] Date: 12 Jul 2021 Expiry: [] Quote number: QU-0002 Reference: [] Theme: Standard

+ Add a Title & Summary

NZD New Zealand Dollar Amounts are Tax Exclusive

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


+ Add a new line

Subtotal 0.00

Total 0.00

Terms

also agreeing to our standard terms of trade. These apply in addition to any specific exclusions noted above. You can find our standard terms of trade by visiting our website at [insert your URL e.g. www.samplesite.com/terms-of-trade]. Please read these carefully as they form the contract between us.

HOW TO ACCEPT | Please ensure you click the link supplied in your email to accept this Quote 

Save Send... Cancel

END OF HELPSHEET

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