



HELPSHEET: HOW TO ADD CUSTOM COVER EMAIL TEXT XERO_BOOKKEEPERS

Purpose

In this help sheet we provide you with guidance on how to add **custom cover text** to your Xero covering email that accompanies your quote/service proposals.

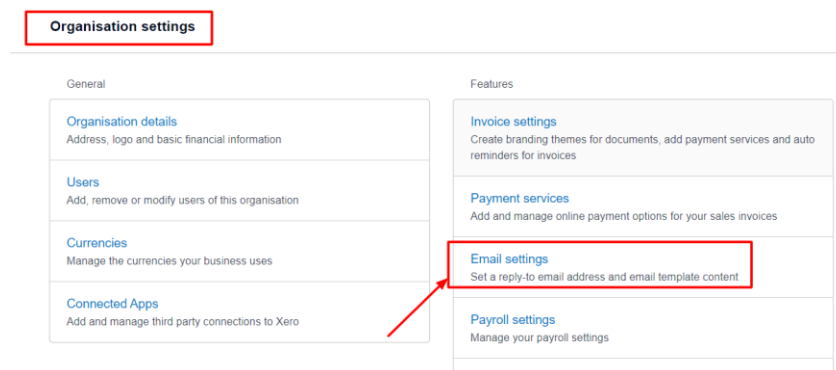
Key Information

- Your cover email is a great **customer service tool**.
- You can use this cover email to **inform** your clients on **how to accept your quote/service proposal**.

How to Add Custom Email Text

Go to your Xero Dashboard

Go to Organisation settings>Email settings



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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.

Go to Organisation settings>Email settings>Templates

[Organisation settings](#) >

Email settings

Tailor the emails you send from Xero

See our [help article](#) to learn how to control the display name and reply address

Tailor the emails sent from this organisation

Email address As you are the logged in user, emails are sent using the name **sian wingate** with replies going to <**sian@tradieterms.com**> [Edit](#)

Templates You have **8 standard templates** and **1 custom template** [Edit](#)

Go to Templates>Quote

Templates

Type	Name ▲
Receipt DEFAULT	Basic
Statement DEFAULT	Basic
Repeating Invoice DEFAULT	Basic
Sales Invoice DEFAULT	Basic
Purchase Order DEFAULT	Basic
Remittance DEFAULT	Basic
Credit Note DEFAULT	Basic
Quote DEFAULT	Basic
Sales Invoice	Overdue - payment reminder

Edit Quote>select all placeholder text>replace with your own custom text (see below)

Hi [Customer First Name]

Thank you for your interest in working with **type your company name**.

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Here's our services proposal and letter of engagement for our services.

To View your Services Proposal online click: [Online Quote Link]

From your online proposal you can accept, decline, comment or print.

NEXT STEPS

Please confirm your acceptance by clicking on the prompts provided.

QUESTIONS

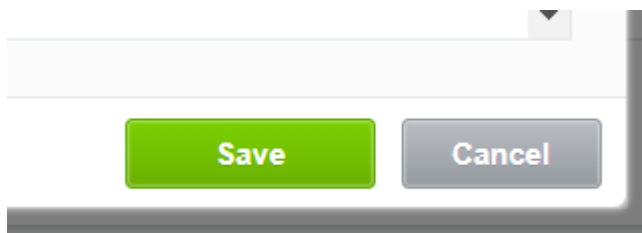
If you have any questions, please let us know by email to alana@honeybooks.co.nz or add your questions directly into the quote/proposal and we will respond.

We look forward to working with you.

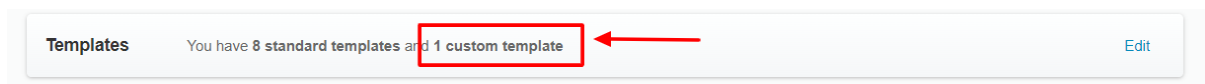
Type your company name

Important Note: Terms of Engagement can be found on the back pages of the Services Proposal included in this link. By clicking on any link, accepting this quote/proposal via email, paying us a fee or issuing a purchase order to you, you are accepting our terms of engagement.

Click save



You should now see that you have a **custom template**



END OF HELPSHEET

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