



# **Xero**

# **Guide to Creating Quotes**

## Creating Customer Quotes & Invoices

The first step in getting a new customer is to first provide a quotation for your products and services. Some small businesses create these quotes using Microsoft Word and when they win the business they then create an invoice.

### Create a Quote

1. Click on the Accounts dashboard tab and select Sales
2. Click on the drop-down arrow next to the New button, and select Quote
3. Enter the details to create the following quote:

Sales > Quotes >

### New Quote

Create 📄

Customer:  Date:  Expiry:  Quote number:  Reference:  Theme:

+ Add a Title & Summary

Currency:  Amounts are:

Item	Description	Quantity	Unit price	Disc %	Account	Tax rate	Amount AUD
⋮	Training a group of employees in Microsoft Word & Excel	5.00	200.00		200 - Sales	GST on Income	1,000.00
⋮							

+ Add a new line

Subtotal	1,000.00
Includes GST 10.00%	90.91
<b>Total</b>	<b>1,000.00</b>

4. Click on Send
5. Enter your email address to send the quote

The screenshot below appears to confirm that the quote has been sent.

Sales > Quotes >

### Quote QU-0001

✔ Quote QU-0001 sent to Cumulo Pty Ltd ✕

Sent ✔ Send Print Options ▾

Customer	Date	Expiry	Quote number	Theme
Cumulo Pty Ltd	11 Dec 2016	19 Dec 2016	QU-0001	Quote

[+ Add contact details](#)

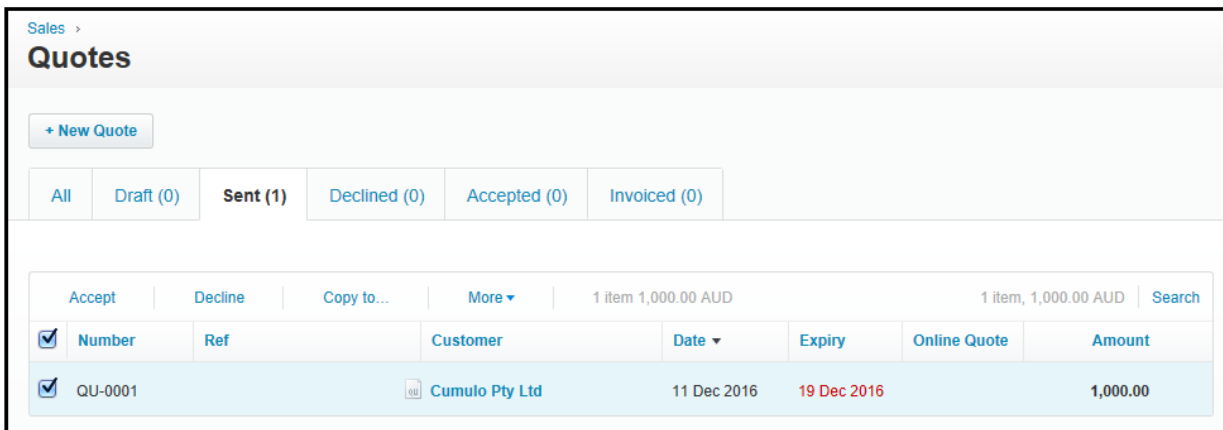
Amounts are tax exclusive

Item	Description	Quantity	Unit price	Disc %	Account	Tax rate	Amount AUD
	Training a group of employees in Microsoft Word & Excel	5.00	181.82		200 - Sales	GST on Income	909.09
Subtotal							909.09
Total GST 10%							90.91
<b>Total</b>							<b>1,000.00</b>

[Terms](#)

## Accept and Create an Invoice for Quote

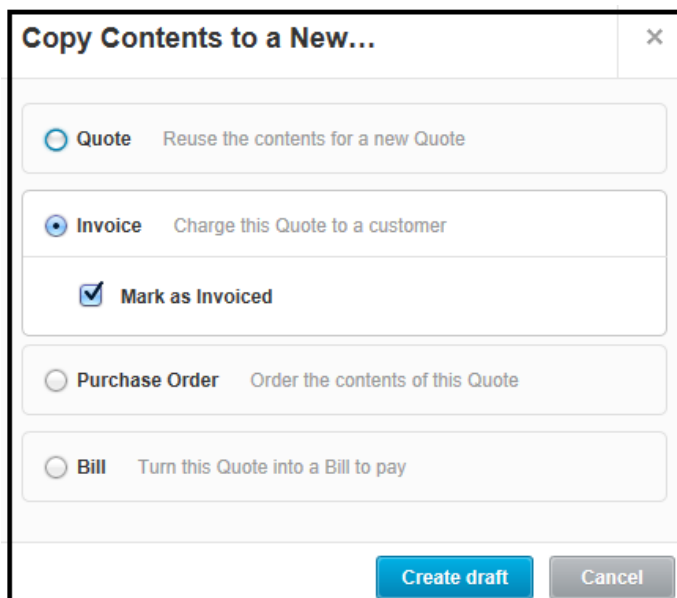
1. Click on the Accounts tab and select Sales
2. Click on the Sent status panel under Quotes
3. Tick the box next to the quote and click Accept



The screenshot shows the Xero 'Quotes' page. At the top, there's a '+ New Quote' button. Below it are tabs for 'All', 'Draft (0)', 'Sent (1)', 'Declined (0)', 'Accepted (0)', and 'Invoiced (0)'. The 'Sent (1)' tab is active. Below the tabs is a table of quotes. The first quote is selected (checked) and has the following details:

Accept	Decline	Copy to...	More	1 item, 1,000.00 AUD		1 item, 1,000.00 AUD		Search
<input checked="" type="checkbox"/>	Number	Ref	Customer	Date	Expiry	Online Quote	Amount	
<input checked="" type="checkbox"/>	QU-0001		Cumulo Pty Ltd	11 Dec 2016	19 Dec 2016		1,000.00	

4. Click on the Accepted tab
5. Tick the box next to the quote and click Copy to
6. Select Invoice and tick the box to Mark as Invoiced



The screenshot shows a dialog box titled 'Copy Contents to a New...'. It has a close button (X) in the top right corner. The dialog contains four radio button options:

- Quote: Reuse the contents for a new Quote
- Invoice: Charge this Quote to a customer
- Mark as Invoiced
- Purchase Order: Order the contents of this Quote
- Bill: Turn this Quote into a Bill to pay

At the bottom of the dialog, there are two buttons: 'Create draft' (highlighted in blue) and 'Cancel'.

7. Click on Create draft

## 8. Enter the invoice date and due date for the new invoice below

Sales > Invoices > **New Invoice**

Quote QU-0001 has been marked as invoiced

To:  Date:  Due Date:  Invoice #:  Reference:  Branding:  [Preview](#) [Print](#)

Add last items

Amounts are

Item	Description	Qty	Unit Price	Disc %	Account	Tax Rate	Amount AUD	
::	Training a group of employees in Microsoft Word & Excel	5.00	200.00		200 - Sales	GST on Income	1,000.00	
							Subtotal	1,000.00
							Includes GST 10.00%	90.91
							<b>TOTAL</b>	<b>1,000.00</b>

[Add a new line](#)

[Save](#) [Approve](#) [Cancel](#)

## 9. Click on Approve