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:

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.
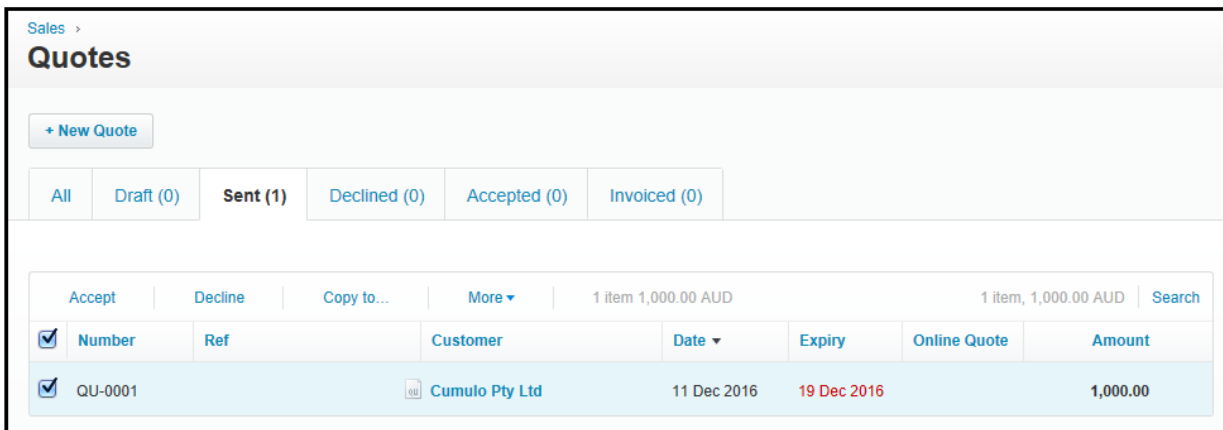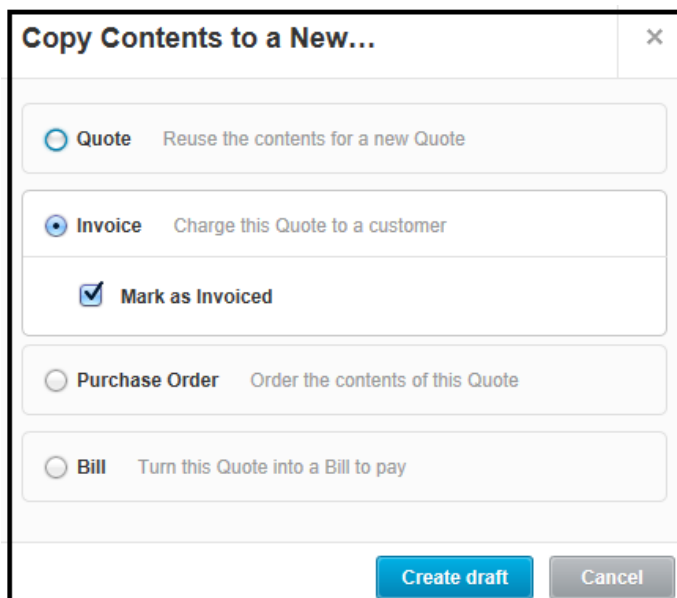
Accept and Create an Invoice for Quote

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

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

7. Click on Create draft

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

9.   Click on Approve