



## XERO NEWSLETTER

First Edition

[WWW.XEROSPECIALISTS.CO.UK](http://WWW.XEROSPECIALISTS.CO.UK)

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### Welcome to our first Xero newsletter!

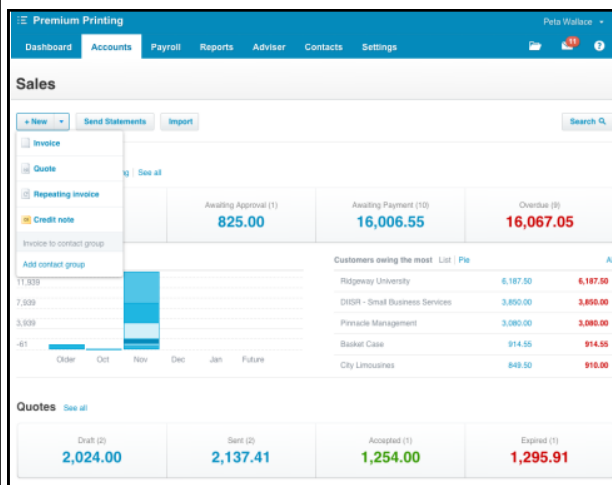
These newsletters will be produced quarterly covering some of the latest Xero changes as well as some handy hints and tips for you to utilise.

We have focussed this issue on one of the latest changes that you may be interested in—the online quotes feature.



24/7 CLOUD ACCOUNTING

### NEW FEATURE- Online quotes in Xero



The latest Xero release has brought the introduction of online sales quotations, meaning it is now even easier to stay on top of your sales and potential new business.

You are now able to send your customer an online quote, which the customer can accept with the click of a button. This can then be quickly generated into an invoice and resent, which the customer can then easily pay online.

#### How it works

The first step is to create a quote from the sales area of Xero, filling in the details of the work proposed and costs. This can then be sent to the customer via email,

providing them with a direct link to your quote. Here they have the option of accepting, declining, or commenting.

As the customer responds, your records in Xero are updated in real time, so you are able to see those quotes that have been accepted/declined, and those in which the customer has come back to you with a query. Where this is the case you can respond or amend as necessary, and then update the quote.

The online quote is updated in real time, meaning any amendments can be seen immediately by both you and the client.

Once the customer has accepted the quote, the quote will be shown under the “accepted” quotes tab, and from here you will then be able to generate it into a sales invoice in just a few clicks.

From here, the sales invoice can then be sent back to the customer, where they have the ability to pay directly, by clicking onto the link on the invoice.

Speak to one of the Xero team if this is a feature you would like to use, and we will be more than happy to help you set up your online quote templates, and ensure customers emails are appropriately stored .

Quoting and invoicing made simple!

# Welcome to Add On Reviews!



As more and more of our clients switch over to Xero, the team here at WG think it is important that we continue to help you get the most out of Xero for your business, and as such, over the coming months we will be reviewing a number of the top Xero add ons on the market that we believe may be relevant to you.

There are a wide range of add ons available, those that monitor cash flow, inventory, online payments, forecasting and budgeting, to list just a few.

Should you come across an add on yourself that you would like to see reviewed, please do not hesitate to get in touch with one of us, and we will be happy to add it to the list!

## HANDY TIPS



### TIP 1

Tired of having to retype your e-mail address every time you log into Xero?

You can enter your user name in the following URL and save as a bookmark in your web browser;  
<https://login.xero.com/?username=YOURUSERNAMEHERE>

Now when you follow the bookmark your user name will automatically entered.

### TIP 2

Multiple tabs open so you don't lose your place...

Did you know you can have multiple tabs open in Xero? When you want to navigate to another area, just hold your CTRL key down on your keyboard as you click, and you'll find another tab opens.

Just remember when doing this ,changing something in one tab doesn't automatically update it in another tab. Just hit F5 to refresh the original screen.

## MEET OUR XERO SPECIALIST TEAM



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We would love to hear what you think.

The Williams Giles Xero team are always here to help, please get in contact if we can be of any assistance. Keep an eye out for our new specialist Xero website.

We want you to get the best out of Xero, so if there is anything you would like us to feature in our future newsletters, please get in touch with us.