



Top tips for Xero users

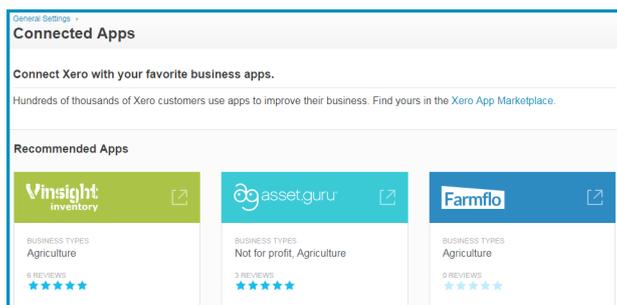
In this month's issue of Top tips for Xero users we show you one of Xero's more recent features, Connected Apps, and we take a look at branding themes. We also see how WorkflowMax can offer you even more flexibility with invoicing.

Connected Apps

Have you ever thought about how using a Xero app could benefit your business but you just don't know where to start? Well, Xero can now recommend some of the top rated apps for your line of business:

Settings > General Settings > Connected Apps > see Recommended Apps

This is a great place to start exploring the world of Apps and from here you can access Xero's App Marketplace.



Top tip – to ensure apps relevant to your business are recommended, make sure you have filled in the 'What is your line of business?' box under General Settings > Organisation Settings.

Branding themes

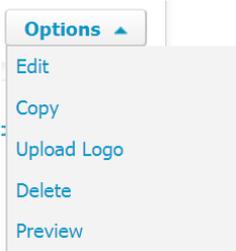
Add a branding theme to use with your invoices, credit notes, statements, quotes, purchase orders, receipts and remittance advice. You can set up multiple themes to use in different situations. There's no limit to the number of themes you can add and you can even copy an existing theme to edit.

To start creating a branding theme go to Settings > General Settings > under Features, select Invoice Settings > click New Branding Theme > select Standard

A window will pop up, and this is where you can enter all the information you need to be displayed on your documents. For reference, there are tick boxes that allow you to define which information is and is not shown.

Once you have saved the theme you will always be able to find the theme by following the same steps shown above. The page will show you all the themes you have previously set up and will allow you to go in and edit these.





It is also from here that you will be able to upload a logo to be included on your documents. Just choose Options > Upload Logo > Browse > Upload. Once you have done this you can preview the document by clicking on Options > Preview.

If you require a more bespoke document layout in Xero then adding a DocX branding theme might be the solution. This can be quite complex so ensure you follow Xero's comprehensive rules for using DocX [here](#) or contact us on xero@krestonreeves.com for assistance.

App review



If Xero's invoices aren't quite detailed enough for your needs, there are loads of apps you could use to help with this, such as WorkflowMax. Whilst this app covers everything, from time tracking and job management to purchase orders and quoting, we have listed some of the fab invoicing features, here:

- Simple invoice – invoice online in a few quick clicks with only basic information
- Add a little detail – if your client needs more information, no worries. With a few clicks you can add a line for each task
- Include it all – go all out with staff, times, rates and extra notes to create a highly detailed invoice
- Multi-job invoices - deal with complex invoices such as multiple jobs with ease

You can also choose how to calculate your invoices: actual time & costs, percentage of quoted value, quoted/estimated time & costs or progress amount/deposit.

Get your invoices looking the way you want in their clever invoice creator. Add your own logo, branding, payments terms and optional extras.

To view all of our Top tips for Xero users publications please visit our Online accounting news area of the website, [here](#).

Coming soon...

- Ability to add separate billing and shipping addresses
- Updates to Project reports including the ability to include a profitability %
- Emails sending invoices will have a quick 'View Invoice' button

If you would like any further information or advice on Xero Projects, please contact xero@krestonreeves.com.

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February 2018

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