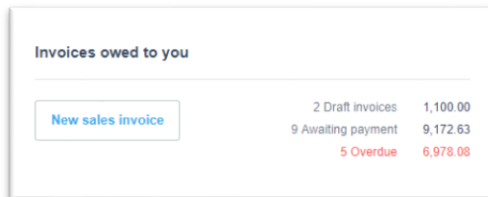


Creating Sales Invoices

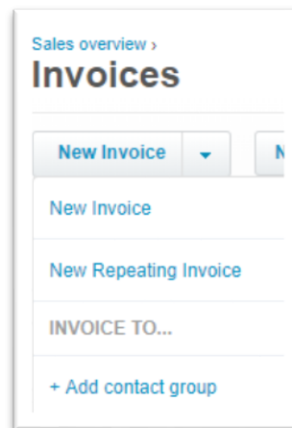
From the dashboard:

*New Sales Invoice
(Invoices owed to you)*



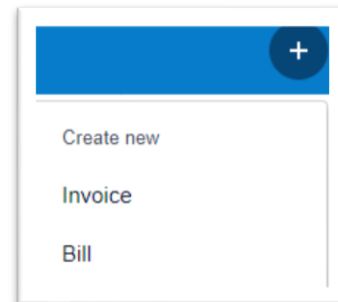
Business tab:

*Invoices
New invoice
New invoice*



From any screen in Xero:

+ symbol in the top bar - invoice



Information required:

To – contact name

Date – Date the invoice is being created

Due Date – Date you expect payment

Invoice # - Xero will automatically allocate one but this can be overridden

Reference – Any other reference details you would like included

Branding – If using different templates, you would choose the relevant one here (please enquire with our account manager for more information on different branding templates)

Amounts are – Tax inclusive/exclusive or no tax, depending on how you prefer to calculate the invoice

Description – What are you invoicing for

Quantity – Usually set to 1 unless you are billing per item

Unit price – Price per unit of work

Account – What account does it relate to (ie sales, rent received, OPEX recovered, etc)

Tax Rate – Automatically populates based on the account. Check it's correct before continuing

Tracking code – Only use if tracking is being used

Once all fields are completed and the total is correct, press the **Approve** button.

Original 'Classic' invoice

New Invoice

To	Date	Due Date	Invoice #	Reference	Branding	Preview
Contact Name <input style="font-size: 8px; border: none; border-bottom: 1px solid #ccc; margin-left: 5px;" type="text" value="New"/>	8 Mar 2018	15 Mar 2018	INV-0041	February Work	Standard	

NZD New Zealand Dollar Amounts are Tax Inclusive

Item	Description	Qty	Unit Price	Disc %	Account	Tax Rate	Region	Amount NZD
112	Work in February	1.00	500.00		200 - Sales	15% GST on Income		500.00 ×
113	February Expenses to oncharge	5.00	20.00		200 - Sales	15% GST on Income		100.00 ×
114								×
115								×

Add a new line

Subtotal	600.00
Includes GST 15.00%	78.26
TOTAL	600.00

Save
Approve
Cancel

New 'Simple' invoice layout

AC Arabica Cafe ×

golf balls

1222

Issued 5 Dec 2018 ▼

Due 20 Jan 2019 ▼

New Zealand Dollar ▼

Standard ▼

Item	Quantity	Price	Amount
Fish out of Water: Finding Your Brand	12	19.95	239.40
Golf balls - white single. Please reorder with code GB1-White	12	5.60	67.20
Golf balls - white 3 pack. Please reorder with code GB3-White	1	15.00	15.00
Golf balls - white 6 pack. Please reorder with code GB6-White	1	24.99	24.99

Add another item...

Subtotal incl. tax ▼	346.59
Total GST	45.22
Total	346.59