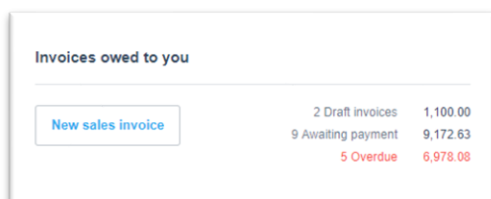


Creating Sales Invoices

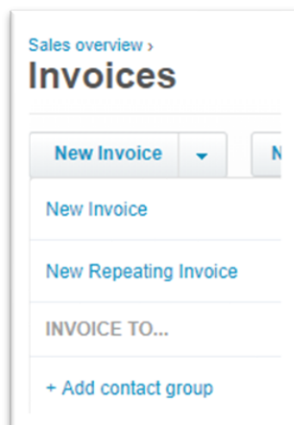
From the dashboard:

New Sales Invoice
(Invoices owed to you)



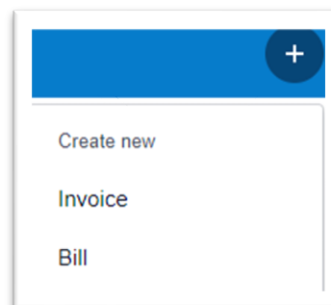
Business tab:

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	
Contact Name New x	8 Mar 2018	15 Mar 2018	INV-0041	February Work	Standard	Preview

NZD New Zealand Dollar Amounts are Tax Inclusive

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

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 x

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