

Top tips to become a Xero Hero

Did you know that you can set up default email templates in Xero?

Email templates, once set-up, can be used when sending out documents such as purchase/sales orders, invoices and remittances to your customers and suppliers. Setting up the templates is a simple procedure that can save a lot of admin time in the future.

To set up a new email template or edit an existing one go to **Settings > Email settings** and click **'Edit'** next to templates.

You can then select the email you want to edit or click **'+Add email template'**.

You will then be able to select an email type, which will depend on the document you are sending, and give it a name.

Add an email template [Close]

Type: Statement
Name: Chase customer email 1

Default

Message [Insert placeholder]

Statement from [Trading Name] for [Contact Name]

Hi [Contact First Name].

Here's your statement [Statement Date Range]

If you have any questions, please let us know.

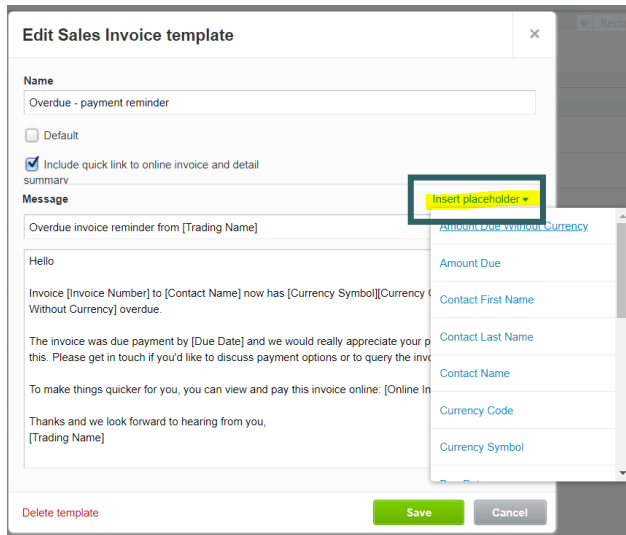
Thanks,
[Trading Name]

[Save] [Cancel]

Insert placeholders

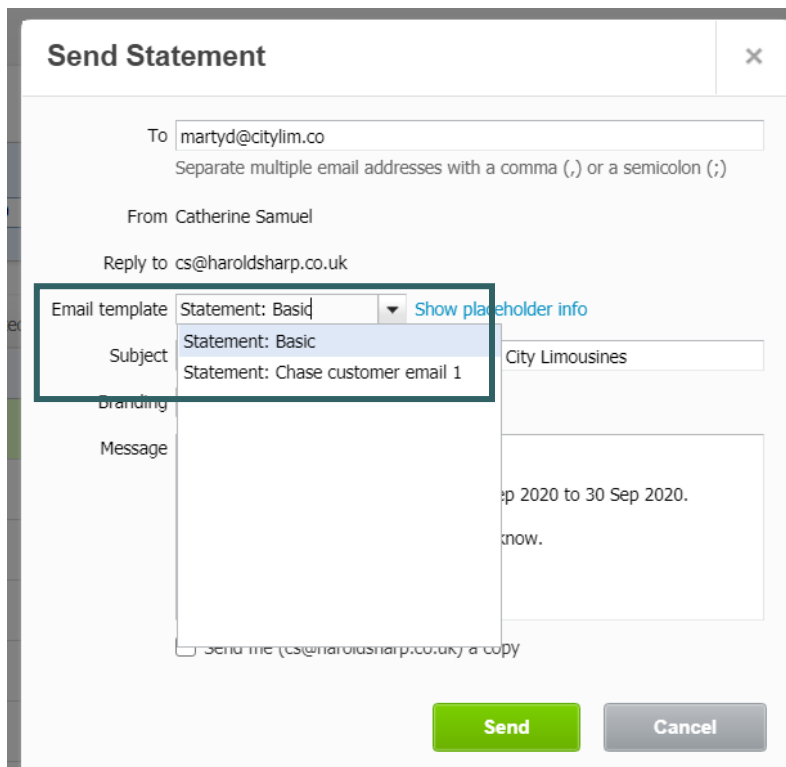
Placeholders are named markers, where content from Xero displays when you send the email.

Placeholders have square brackets around them. They can be inserted into email templates in both the subject and the message by selecting from the placeholder list.



You can choose to tick the box to make it the default email if you wish. This can be changed later if you then want to select a different default.

Once saved, the email will be available as an option when sending out the relevant document to your customer/supplier.



Looking for more top tips?

As a platinum Xero partner, we are well placed to advise on all aspects of the software. We match our clients' needs with cutting-edge technology and a dedicated chartered accountant to deliver pro-active management of finances. Our aim is to take the hassle out of your finances, helping you save time, make money and grow your business.

If you are looking for further advice as to how to get more out of your Xero subscription, contact **Cathy Samuel** to discuss our training and support packages.



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