**Personalising Your Xero Software Set Up Checklist**

**Using your logo(s)**

[ ]  1 logo

[ ]  Multiple logos

[ ]  No logo needed

**Adding Users**

[ ]  Let Cashtrak know the name, email address and user role or all users

**Multi-Currency**

[ ]  Let Cashtrak know if you want to have multi-currency or would like more information on it

[ ]  Don’t need multi-currency

**Invoice Options**

[ ]  If using your logo it will default to the right hand side of the invoice, advise us if you want it on the left

[ ]  Advise Cashtrak if he you would like to replace the words ‘Tax Invoice’

[ ]  Let Cashtrak know if you use Proforma Invoices so we can talk through the requirements

Call or Whats App: 01865 522785 Email: info@cashtrak.co.uk

**Advise if you want to add any of these under the from section:**

[ ]  Phone number(s)

[ ]  Email address(es)

[ ]  Website(s)

**Advise if you want the following:**

[ ]  Columns rearranged or removed

[ ]  Wording regarding payment changed for different layouts

[ ]  Only want people to pay by credit card

[ ]  Have different bank accounts for different items you sell

[ ]  Use a direct debit system so want to add something like 'this is for information and record keeping purposes only'

[ ]  Require a 'thank you for your business' or similar

[ ]  Let Cashtrak know if you want to use specified email addresses your Xero communication is sent from

[ ]  Invoice line items – download and complete the spreadsheet

**Quotations**

[ ]  Provide quote expiry period for quotations

[ ]  Provide reference numbers to use for quotes

**Receiving Payments**

[ ]  Require Crezco

[ ]  Require Gocardless

[ ]  Talk about options

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**Default Email Wording**

[ ]  Require invoice wording to be changed

[ ]  Require payment reminders to have wording changed

**Analysis Of Income Types**

[ ]  Would like to personalise chart of accounts

**Reporting**

[ ] Require specific, tailored reports

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**Notes Section**

*Use this section to make any notes to discuss with us*

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