**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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