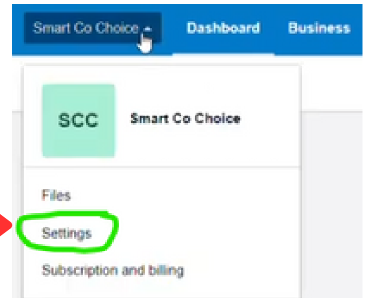
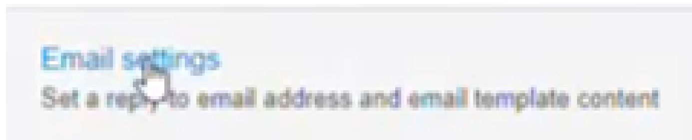
# <u>How to Send & Print Invoices from Xero</u>



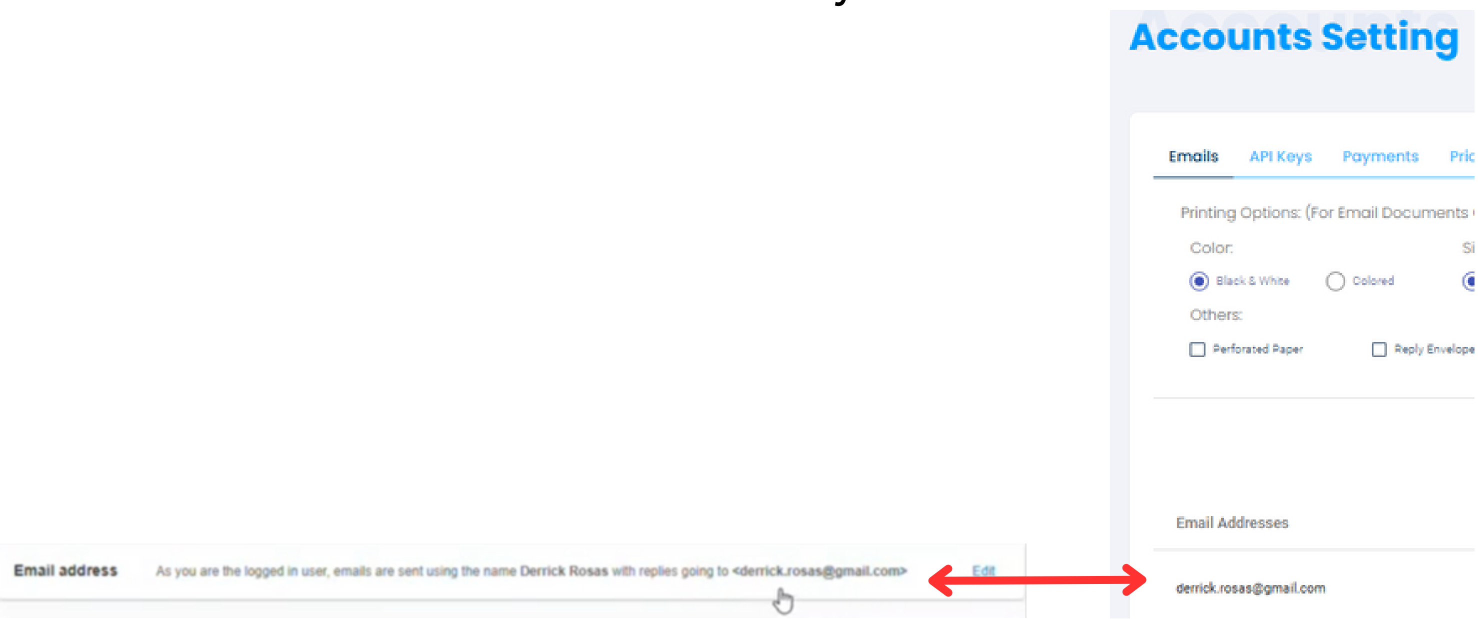

First you will **Login to your Xero account**

Then **Click on Settings**

Now **Click on Email settings**

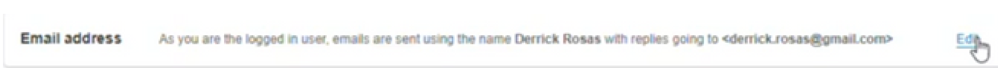



**Make sure that this email address matches the one in your Postal Methods account**




Note: If you want the email address that you have attached to your Xero account to be different than the email address you use to correspond with your customers, then:

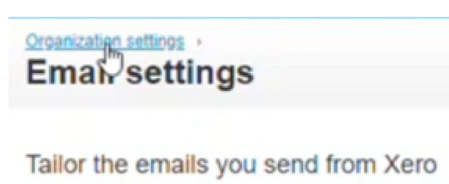
**Click on Edit**



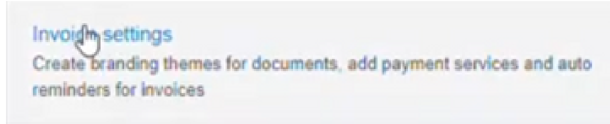

Then **Click on Add email address**


Then **enter that Email address in the top Reply to Email Address and Name it what you want.** Please keep in mind, ***this new Reply to Email Address, must match the one in Postal Methods.***

Now **Click on Organizational settings** towards the top

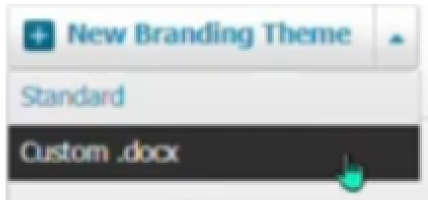


Now **Click on Invoice settings**



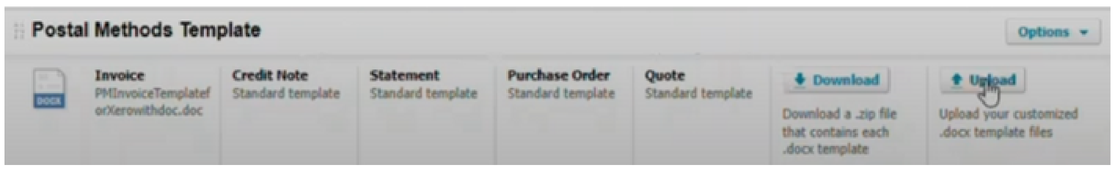

First **Click on New Branding Theme Drop Down Box**


Now **Click on Custom .docx**



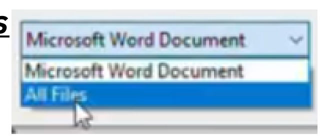

Then **Download it and Name it Postal Methods**

Now **Click on Upload**

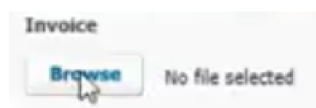



**Click Link at the end of this tutorial labeled Xero Invoice Template and save it to your computer**

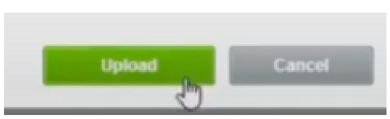
***Note: If you cannot locate file, click on All Files***




Then **Click on Browse** and **Upload the Xero Template**

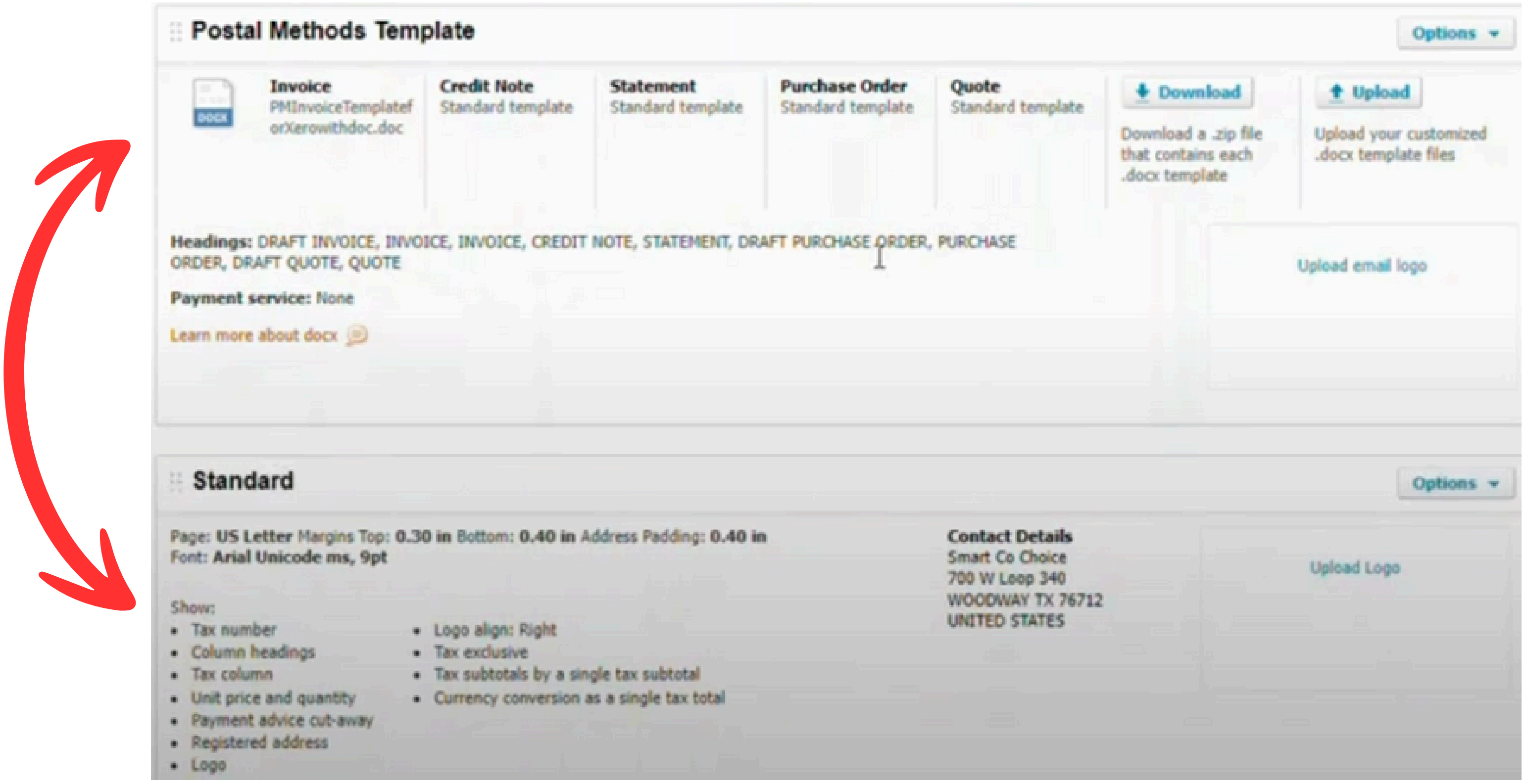



Then **Click on Upload**



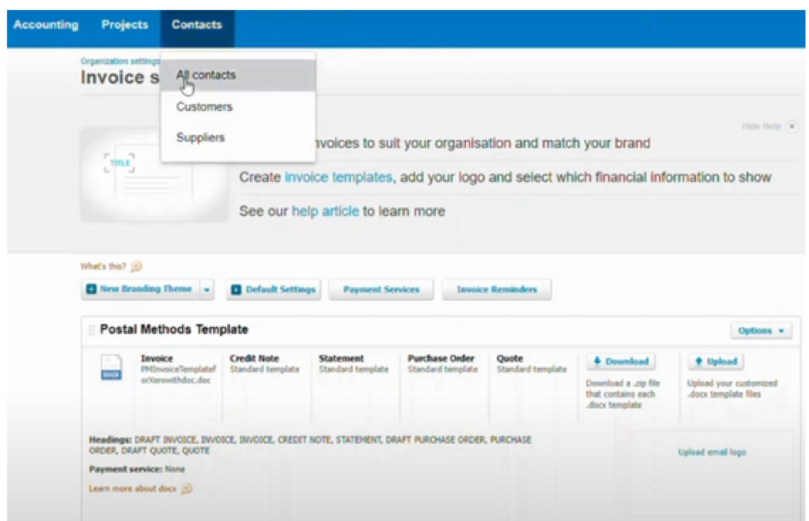

then **Name it what you want**

Now **Drag the New Postal Methods Template and place it Above the Standard Template**

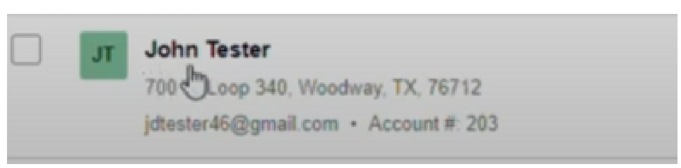



**By placing the New Postal Methods Template on top, it now makes it the default template**

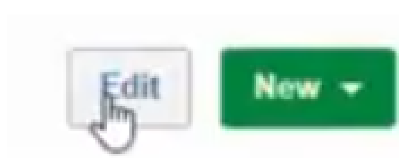
Now go to the top and **Click on Contacts** and **Click on All Contacts**



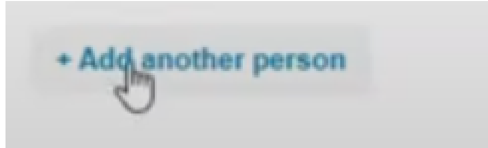

Then **select a Contact or Add a New Contact**



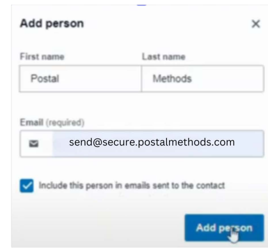

Then go to the Top Right and **Click on Edit**



**Click on Add another person**



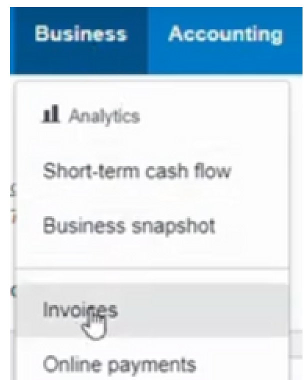

Then put **Postal for First Name & Methods for Last Name, the enter the following email:**




**send@secure.postalmethods.com**

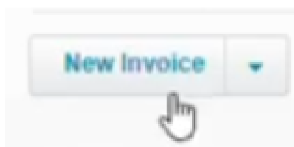
Make sure to **Checkmark the box: Include this person in emails sent to the contact**, then **Click on Add person**

Then **Click on Save and Close**




Now Go up to the top and **Click on Business** then **Click on Invoices**

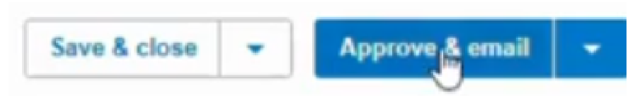
Now **Click on Create a New Invoice**





Now **Select a Customer**
Then make your preferred choices for your invoice (i.e. Due date, item, etc)

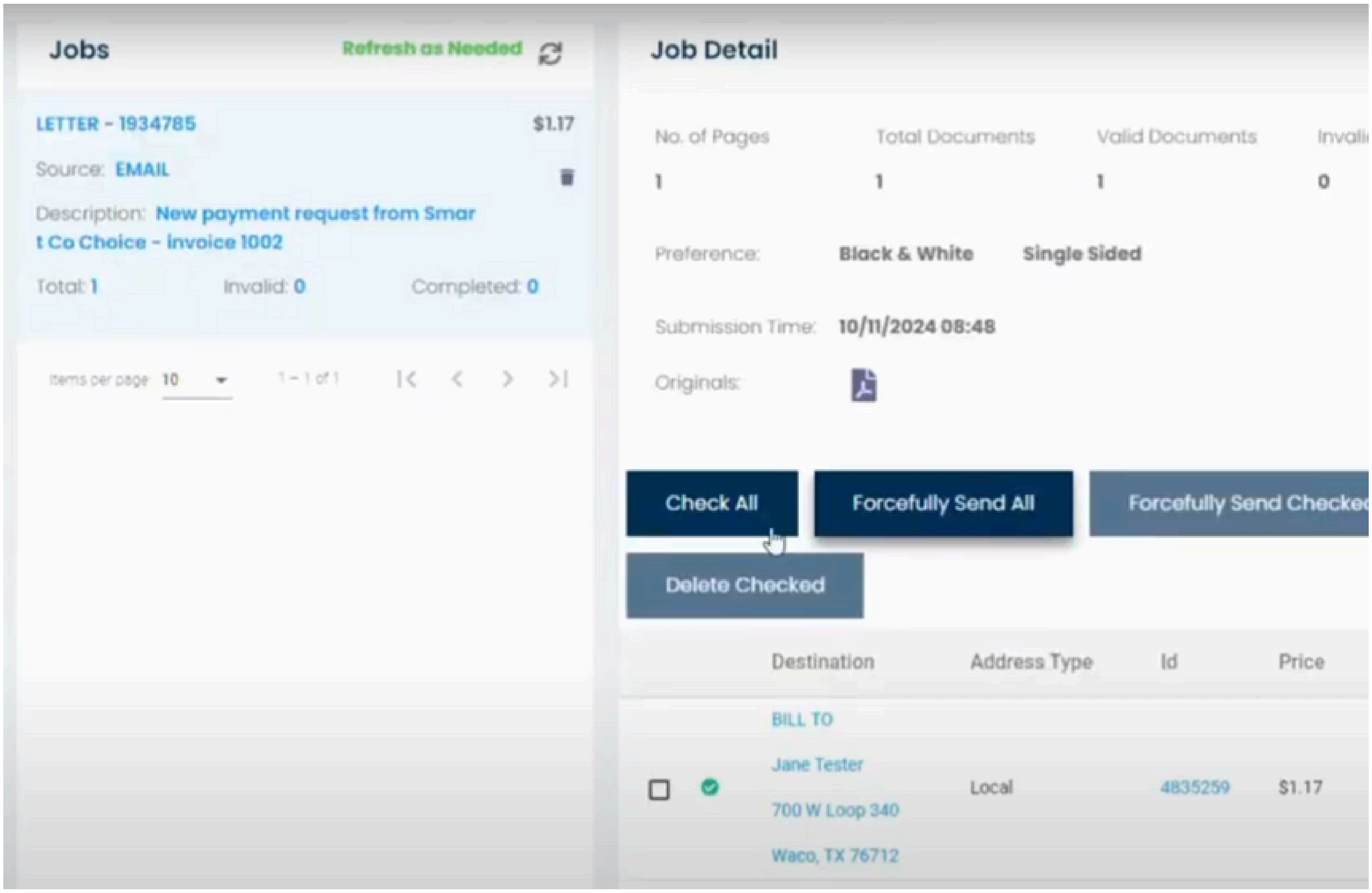
Then go to the Top Right and **Click on Approve & email**




Now put a **Checkmark by Attach PDF** to email and Click on Send

## **Processed Documents**

Now that the invoice or invoices have been sent to Postal Methods, you can then see them on the Processed Documents page, after you have refreshed your screen.




### **DOWNLOAD LINK FOR XERO INVOICE TEMPLATE**

Note: Please save the document as type”Word 91-2003 Document” or “Word 97-2003 Document”  If this creates a file with a .doc extension, you’ll need to rename the file extension to docx.