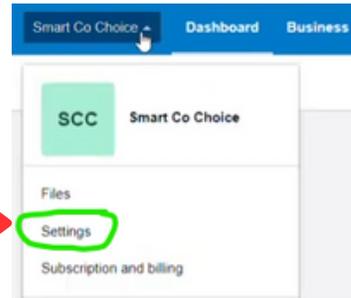


How to Send & Print Invoices from Xero

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

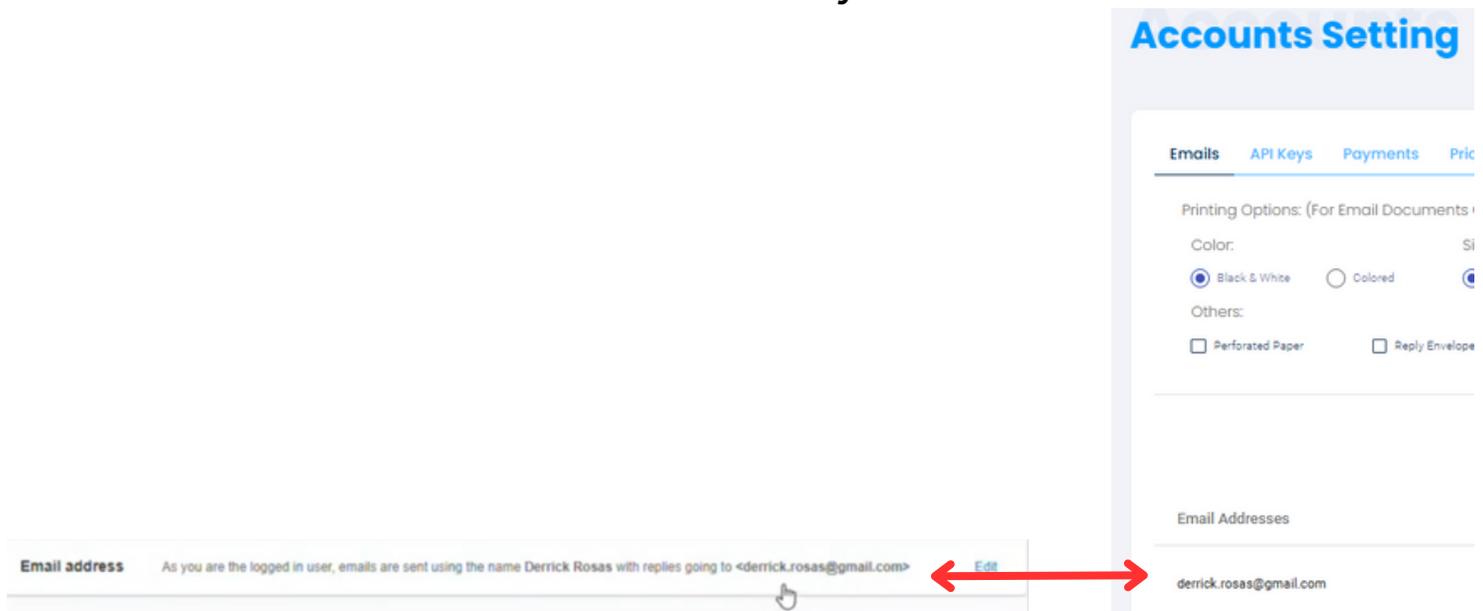
Then **Click on Settings**



Now **Click on Email settings**



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

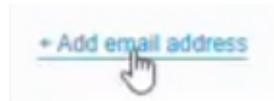


Note: If you want the email address that you have attached to your Xero account to be different than the email address you use to correspond with your customers, then:

Click on Edit

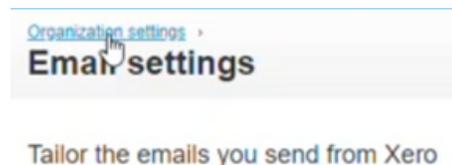


Then **Click on Add email address**

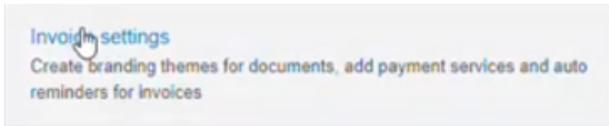


Then **enter that Email address in the top Reply to Email Address and Name it what you want.** Please keep in mind, *this new Reply to Email Address, must match the one in Postal Methods.*

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



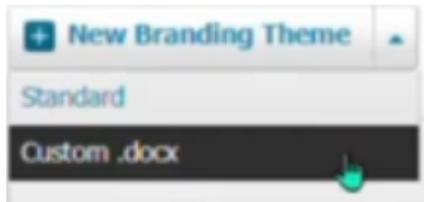
Now **Click on Invoice settings**



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

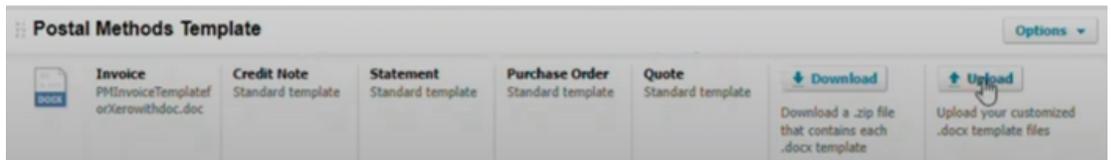


Now **Click on Custom .docx**



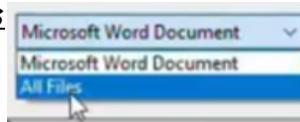
Then **Download it and Name it Postal Methods**

Now **Click on Upload**

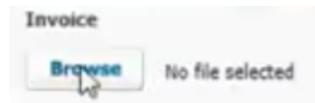


Click Link at the end of this tutorial labeled Xero Invoice Template and save it to your computer

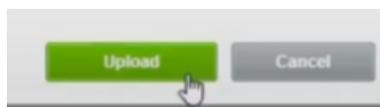
Note: If you cannot locate file, click on All Files



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

The screenshot shows two template sections. The top section is titled "Postal Methods Template" and contains options for "Invoice", "Credit Note", "Statement", "Purchase Order", and "Quote", each with a "Standard template" label. It also includes "Download" and "Upload" buttons, a "Download a .zip file that contains each .docx template" instruction, and an "Upload your customized .docx template files" instruction. Below these are "Headings" (DRAFT INVOICE, INVOICE, INVOICE, CREDIT NOTE, STATEMENT, DRAFT PURCHASE ORDER, PURCHASE ORDER, DRAFT QUOTE, QUOTE) and "Payment service: None". The bottom section is titled "Standard" and shows page margins, font settings, and contact details for "Smart Co Choice". It also has a "Show:" list with options like "Tax number", "Column headings", "Tax column", "Unit price and quantity", "Payment advice cut-away", "Registered address", "Logo", "Logo align: Right", "Tax exclusive", "Tax subtotals by a single tax subtotal", and "Currency conversion as a single tax total". A red arrow on the left points from the "Postal Methods Template" section down to the "Standard" section.

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

The screenshot shows the "Contacts" menu in the software interface. The menu is open, showing options for "All contacts", "Customers", and "Suppliers". The "All contacts" option is highlighted. Below the menu, there is a section for "Invoice s" with a "New Branding Theme" button and "Default Settings", "Payment Services", and "Invoice Reminders" buttons. The "Postal Methods Template" section is also visible at the bottom of the screenshot.

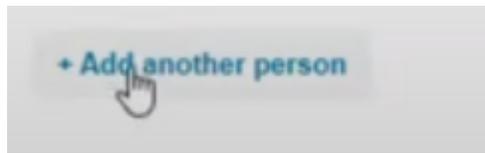
Then select a Contact or Add a New Contact

The screenshot shows a contact card for "John Tester". The card includes a profile picture placeholder, the initials "JT", the name "John Tester", the address "700 Loop 340, Woodway, TX, 76712", the email address "jdtester46@gmail.com", and the account number "Account # 203".

Then go to the Top Right and Click on Edit

The screenshot shows two buttons: "Edit" and "New". The "Edit" button is highlighted with a mouse cursor, and the "New" button is a green button with a dropdown arrow.

Click on Add another person

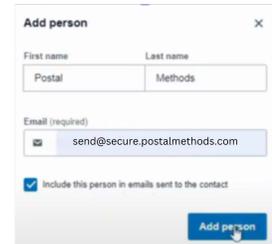


Then put **Postal** for First Name & **Methods** for Last

Name, then enter the following email:

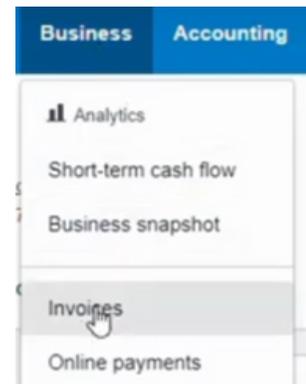
send@secure.postalmethods.com

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

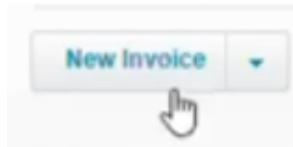


Then **Click on Save and Close**

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.

Jobs Refresh as Needed

LETTER - 1934785 \$1.17

Source: **EMAIL**

Description: **New payment request from Smart Co Choice - Invoice 1002**

Total: **1** Invalid: **0** Completed: **0**

Items per page: **10** 1 - 1 of 1 |< < > >|

Job Detail

No. of Pages	Total Documents	Valid Documents	Invalid
1	1	1	0

Preference: **Black & White Single Sided**

Submission Time: **10/11/2024 08:48**

Originals:

Check All **Forcefully Send All** **Forcefully Send Checked**

Delete Checked

	Destination	Address Type	Id	Price
BILL TO				
<input type="checkbox"/>	Jane Tester	Local	4835259	\$1.17
	700 W Loop 340			
	Waco, TX 76712			

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.