

Xero Template Pre-Brief



Please answer as many questions as you can here, save the file and send it back to us at hello@brandingclever.com

Then we can support you with the best way forward, an estimate for the work and any choices available via a reply email. We'll call you if we need any more info than this at this stage.

It should be noted that Xero has its limits as to what we can 'trick' it to do but we will offer advice based on our knowledge and best working practice and suggest a workaround or two for you to consider.

Thank you!

Company			
Industry		Website	
Your Name		Phone number	

How long has your business used Xero for?

- ☐ Total beginner
- ☐ Fairly familiar
- ☐ Expert with all things front and back end

Do you need particular templates or a full set of 5 for the theme? More than one theme? (We can add more later if you just wish to test an invoice for example)

- ☐ Invoice ☐ Quote ☐ Statement ☐ PO ☐ Credit Note ☐ All 5 or more

Do you sell products or a service, or both?

- ☐ Products ☐ Services ☐ Both

Do you currently have an inventory? Would you consider this if it eased your time and workflow? (Inventories can be used for any service or product that is repetitive)

- ☐ Yes ☐ No ☐ No, but interested to hear more

Please write anything else in your reply email that you feel is hindering you working within Xero and we could potentially look at and we will get back in touch with you shortly.

Thank you!

>> MAIL THE FORM NOW <<

