

Step 1. Open Xero

You're currently using the demo company. Go back to your last organization.

xero Demo Company (UK) Home Sales Purchases Reporting Payroll Accounting Tax Contacts Projects

DCU Demo Company (UK) Last login: 2 minutes ago from United Kingdom

Get familiar with Xero using fictional data. [Learn about your Demo Company](#)

Business Overview

[Edit homepage](#)

Business Bank Account

Statement balance (Mar 22) Balance in Xero

Balance difference

[Reconcile 29 items](#) [Import bank statement](#)

Business Savings Account

Statement balance (Jan 1) Balance in Xero

Balance difference 0.00

[Import bank statement](#)

Invoices owed to you

[New invoice](#) [View all invoices](#)

Bills to pay

[New invoice](#) [View all invoices](#)

Tasks

- 29 Items to reconcile Business Bank Account
- 6 Overdue invoices
- 9 Overdue bills

Recent invoice payments

Invoice #	Contact	Amount

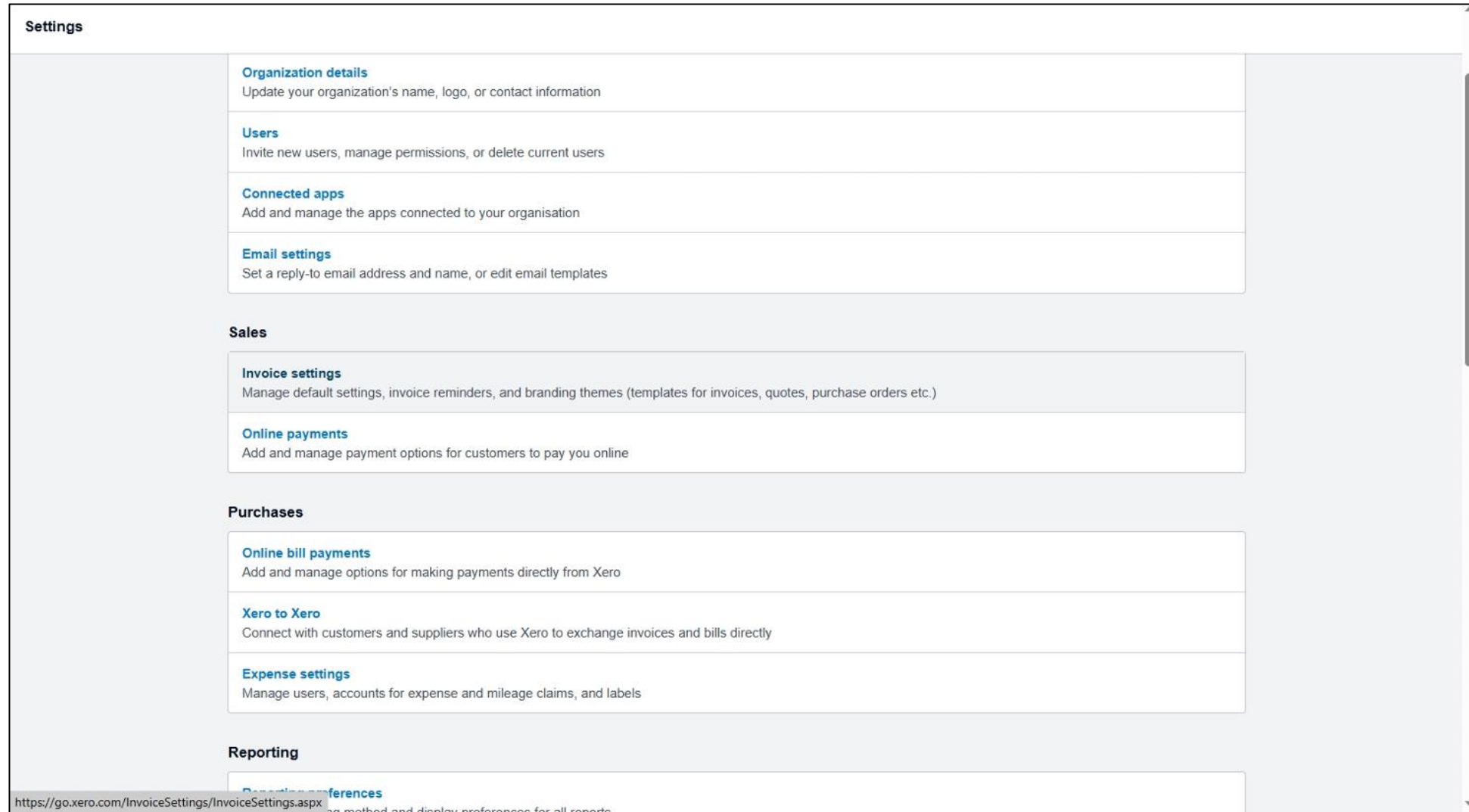
Cash in and out - Last 6 months

Step 2. Go to the Sales Settings

Sales -> Sales Settings

The screenshot shows the Xero dashboard for 'Demo Company (UK)'. The top navigation bar includes 'Home', 'Sales', 'Purchases', 'Reporting', 'Payroll', 'Accounting', 'Tax', 'Contacts', and 'Projects'. The 'Sales' menu is open, displaying options: Sales overview, Invoices, Payment links, Online payments, Quotes, Products and services, Customers, and Sales settings (highlighted with a gear icon). The dashboard features several widgets: 'Business Overview' with 'Business Bank Account' and 'Business Savings Account' sections; 'Invoices owed to you' with a bar chart and '14 awaiting payment' (6 of 14 overdue); 'Bills to pay' with '15 awaiting payment' (9 of 15 overdue); 'Tasks' listing 29 items to reconcile, 6 overdue invoices, and 9 overdue bills; 'Recent invoice payments'; and 'Cash in and out - Last 6 months'. A top banner reads 'You're currently using the demo company. Go back to your last organization.' The URL at the bottom is <https://go.xero.com/app/IS7B6F/settings#sales>.

Step 3. Select 'Invoice Settings'



The screenshot shows the 'Settings' page in Xero, with a left-hand navigation menu and a main content area. The 'Invoice settings' option is highlighted in the main content area. The page is organized into several sections: Organization details, Users, Connected apps, Email settings, Sales, Purchases, and Reporting. The 'Invoice settings' section is currently selected and highlighted.

Settings

- Organization details**
Update your organization's name, logo, or contact information
- Users**
Invite new users, manage permissions, or delete current users
- Connected apps**
Add and manage the apps connected to your organisation
- Email settings**
Set a reply-to email address and name, or edit email templates

Sales

- Invoice settings**
Manage default settings, invoice reminders, and branding themes (templates for invoices, quotes, purchase orders etc.)
- Online payments**
Add and manage payment options for customers to pay you online

Purchases

- Online bill payments**
Add and manage options for making payments directly from Xero
- Xero to Xero**
Connect with customers and suppliers who use Xero to exchange invoices and bills directly
- Expense settings**
Manage users, accounts for expense and mileage claims, and labels

Reporting

- Reporting preferences**
Manage reporting method and display preferences for all reports

<https://go.xero.com/InvoiceSettings/InvoiceSettings.aspx>

Step 4. Select the arrow next to 'New Branding Theme' and select 'DOCX'

New Branding Theme -> 'DOCX' -> '(Enter Branding theme name)' -> OK

a.

The screenshot shows the Xero 'Invoice settings' page. At the top, there is a navigation bar with 'xero' and 'Demo Company (UK)'. Below it, a 'Settings >' breadcrumb leads to 'Invoice settings'. The main content area includes a header with 'Customize invoices to suit your organisation and match your brand' and a sub-header 'Create invoice templates, add your logo and select which financial information to show'. A 'New Branding Theme' dropdown menu is open, showing options: 'Standard', 'Standard (Legacy)', and 'DOCX' (which is highlighted). Below the dropdown, the 'DOCX' theme details are visible, including page margins, font settings, and a list of items to show on the invoice. A 'Contact Details' section is partially visible on the right.

b.

The screenshot shows the Xero 'Invoice settings' page with a 'New Branding Theme' dialog box open. The dialog box has a title bar 'New Branding Theme' and a close button. Inside, it asks 'Your title for the new Branding Theme' and has a text input field containing 'Registered Address'. There are 'OK' and 'Cancel' buttons at the bottom of the dialog. The background page is dimmed, showing the same 'Invoice settings' page as in screenshot 'a', but with the 'New Branding Theme' dropdown menu closed.

Step 5. Select Download the zip file



Select Download -> Select downloaded zip file to open it

a.

Payment service: [REDACTED]

Special projects Options ▾

Page: A4 Margins Top: 1.35 cm Bottom: 1.00 cm Address Padding: 1.00 cm
Font: Calibri, 9pt

Contact Details  

Show:

- Tax number
- Column headings
- Tax column
- Unit price and quantity
- Payment advice cut-away
- Registered address
- Logo
- Discount
- Logo align: Right
- Tax exclusive
- Tax subtotals by tax rates
- Currency conversion as net goods with tax totals








Headings: QUOTE, TAX INVOICE, TAX INVOICE, CREDIT NOTE, STATEMENT, DRAFT PURCHASE ORDER, PURCHASE ORDER, DRAFT QUOTE, QUOTE, REMITTANCE ADVICE, RECEIPT

Payment service: None

Terms & Payment Advice (Invoice and Statement):
Online payment ONLY - BILLPAY direct to our account 99-04-04 987654321 please.

Terms (Quotes):
(None added)

Registered address Options ▾

 Invoice Standard template	 Credit Note Standard template	 Statement Standard template	 Purchase Order Standard template	 Quote Standard template	 Download	 Upload
---	---	---	--	---	---	---

Download a .zip file that contains each .docx template

Upload your customised .docx template files

Headings: DRAFT INVOICE, TAX INVOICE, TAX INVOICE, CREDIT NOTE, STATEMENT, DRAFT PURCHASE ORDER, PURCHASE ORDER, DRAFT QUOTE, QUOTE

Payment service: None



[Upload email logo](#)

b.

Payment service: [REDACTED]

Special projects Options ▾

Page: A4 Margins Top: 1.35 cm Bottom: 1.00 cm Address Padding: 1.00 cm
Font: Calibri, 9pt

Contact Details  

Show:

- Tax number
- Column headings
- Tax column
- Unit price and quantity
- Payment advice cut-away
- Registered address
- Logo
- Discount
- Logo align: Right
- Tax exclusive
- Tax subtotals by tax rates
- Currency conversion as net goods with tax totals








Headings: QUOTE, TAX INVOICE, TAX INVOICE, CREDIT NOTE, STATEMENT, DRAFT PURCHASE ORDER, PURCHASE ORDER, DRAFT QUOTE, QUOTE, REMITTANCE ADVICE, RECEIPT

Payment service: None

Terms & Payment Advice (Invoice and Statement):
Online payment ONLY - BILLPAY direct to our account 99-04-04 987654321 please.

Terms (Quotes):
(None added)

Registered address Options ▾

 Invoice Standard template	 Credit Note Standard template	 Statement Standard template	 Purchase Order Standard template	 Quote Standard template	 Download	 Upload
---	---	---	--	---	---	---

Download a .zip file that contains each .docx template

Upload your customised .docx template files

Headings: DRAFT INVOICE, TAX INVOICE, TAX INVOICE, CREDIT NOTE, STATEMENT, DRAFT PURCHASE ORDER, PURCHASE ORDER, DRAFT QUOTE, QUOTE

Payment service: None

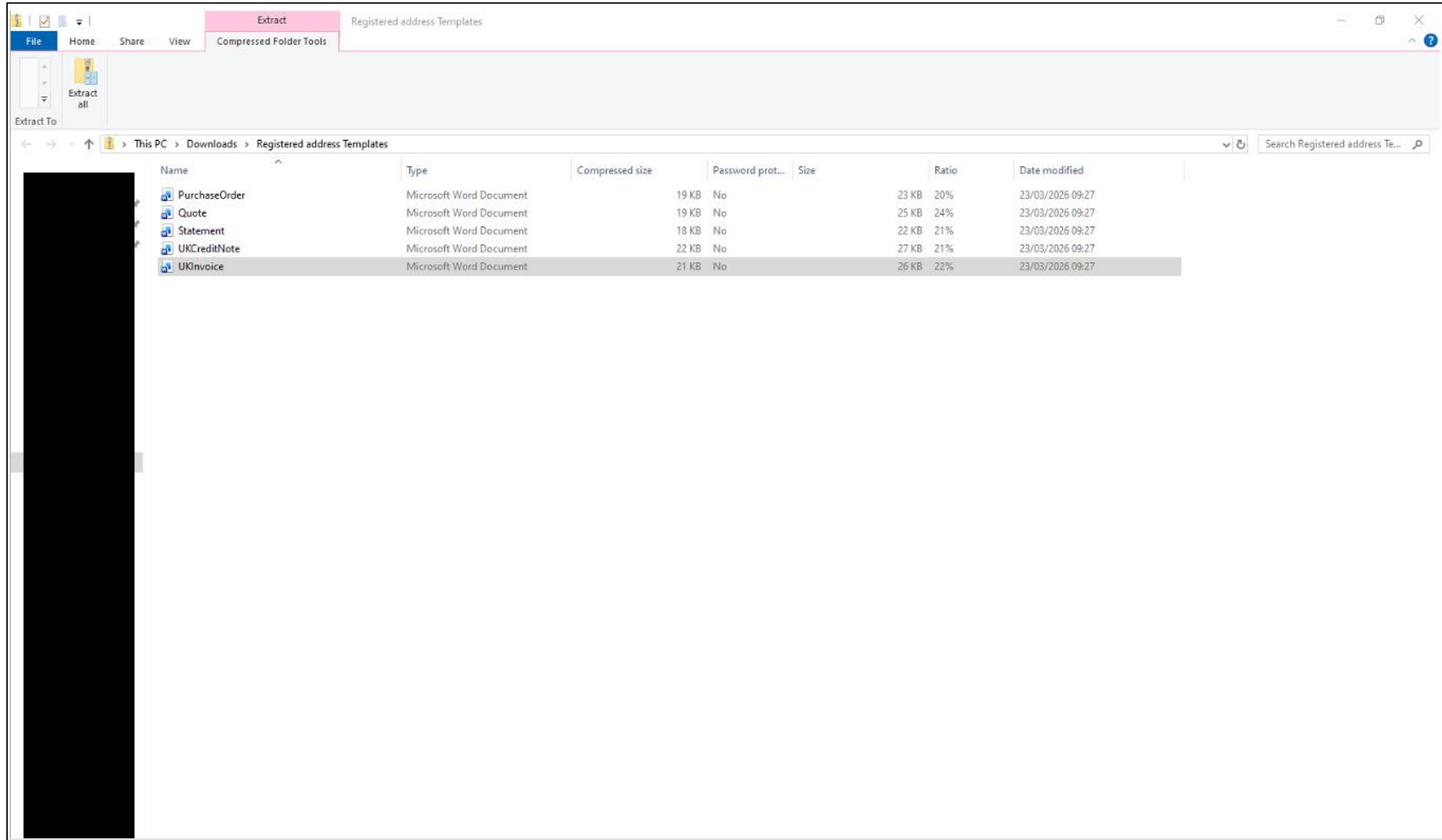
[Upload email logo](#)

Downloads

Registered address Templates.zip
[Open file](#)

See more

Step 6. Select document 'UKInvoice'



The screenshot shows a Windows File Explorer window titled 'Registered address Templates'. The window is in 'Extract' mode, with the 'Compressed Folder Tools' ribbon active. The address bar shows the path: 'This PC > Downloads > Registered address Templates'. A search box on the right contains the text 'Search Registered address Te...'. The main area displays a table of files:

Name	Type	Compressed size	Password prot...	Size	Ratio	Date modified
PurchaseOrder	Microsoft Word Document	19 KB	No	23 KB	20%	23/03/2026 09:27
Quote	Microsoft Word Document	19 KB	No	25 KB	24%	23/03/2026 09:27
Statement	Microsoft Word Document	18 KB	No	22 KB	21%	23/03/2026 09:27
UKCreditNote	Microsoft Word Document	22 KB	No	27 KB	21%	23/03/2026 09:27
UKInvoice	Microsoft Word Document	21 KB	No	26 KB	22%	23/03/2026 09:27

The 'UKInvoice' document is highlighted with a grey selection bar. A large black rectangular redaction covers the left side of the window, including the navigation pane and the left portion of the file list.

Step 7. View/open the invoice template

«INVOICETITLE»

«ContactName»
«ContactPostalAddress»
«ContactTaxDisplayNumber» «ContactTaxNumber»

Invoice Date
«InvoiceDate»

Account Number
«ContactAccountNumber»

Invoice Number
«InvoiceNumber»

Reference
«Reference»

«OrganizationTaxDisplayNumber»
«OrganizationTaxDisplayNumber»

«OrganizationName»
«OrganizationPostalAddress»

«Insert logo here»

Description	Quantity	Unit Price	TaxUnitName	Amount
«TableStart:LineItem» «ItemCode», «Description»	«Quantity»	«UnitAmount»	«TaxPercentage» «LineAmount» «TableEnd:LineItems»	
Subtotal			«InvoiceSubTotal»	
«TableStart:TaxTotal» «TaxCode»			«TaxTotal» «TableEnd:TaxTotal»	
Invoice Total			«InvoiceCurrency»	«InvoiceTotal»
Total Net Payments			«InvoiceCurrency»	«InvoiceTotalNetPayments»
Amount Due			«InvoiceCurrency»	«InvoiceAmountDue»

«DefaultCurrency» Equivalent Conversion
«CurrencyConversionMessage»

TAXUNITNAME	RATES	NET GOODS	TAXUNIT NAME
«TableStart:TaxUnitName» «Code»	«TableStart:Rates» «Code»	«TableStart:NetGoods» «Code»	«TableStart:TaxUnitName» «Code»

Due Date: «InvoiceDueDate»

«PaymentImage»
«PaymentMessageAndUrl»

PAYMENT ADVICE

To: «OrganisationName»
«OrganisationPostalAddress»

Customer: «ContactName»

Invoice Number: «InvoiceNumber»

Amount Due: «InvoiceAmountDue»

Due Date: «InvoiceDueDate»

Amount Enclosed: _____

Enter the amount you are paying above

«RegisteredOffice»

LNInvoice - Read-Only - Compatibility Mode - Saved

Draw Design Layout References Mailings Review View Help Acrobat Header & Footer

Date & Time Document Info Quick Parts Pictures Online Pictures Go to Header Go to Footer Previous Next Link to Previous Navigation Options Different First Page Different Odd & Even Pages Show Document Text Header from Top: 0 cm Footer from Bottom: 0 cm Position Close Header and Footer Close

Amount Due «InvoiceCurrency» «InvoiceAmountDue»

Due Date: «InvoiceDueDate»

«PaymentImage»
«PaymentMessageAndUrl»

First Page Footer

PAYMENT ADVICE

To: «OrganisationName»
«OrganisationPostalAddress»

Customer: «ContactName»

Invoice Number: «InvoiceNumber»

Amount Due: «InvoiceAmountDue»

Due Date: «InvoiceDueDate»

Amount Enclosed: _____

Enter the amount you are paying above

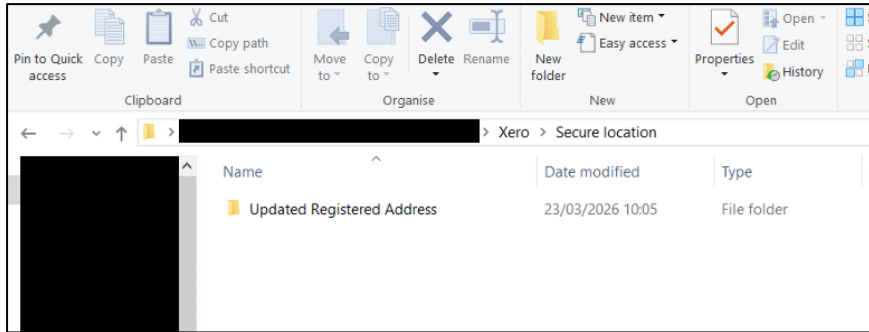
«RegisteredOffice»

English (New Zealand) Text Predictions: On Accessibility: Investigate Display Settings Focus

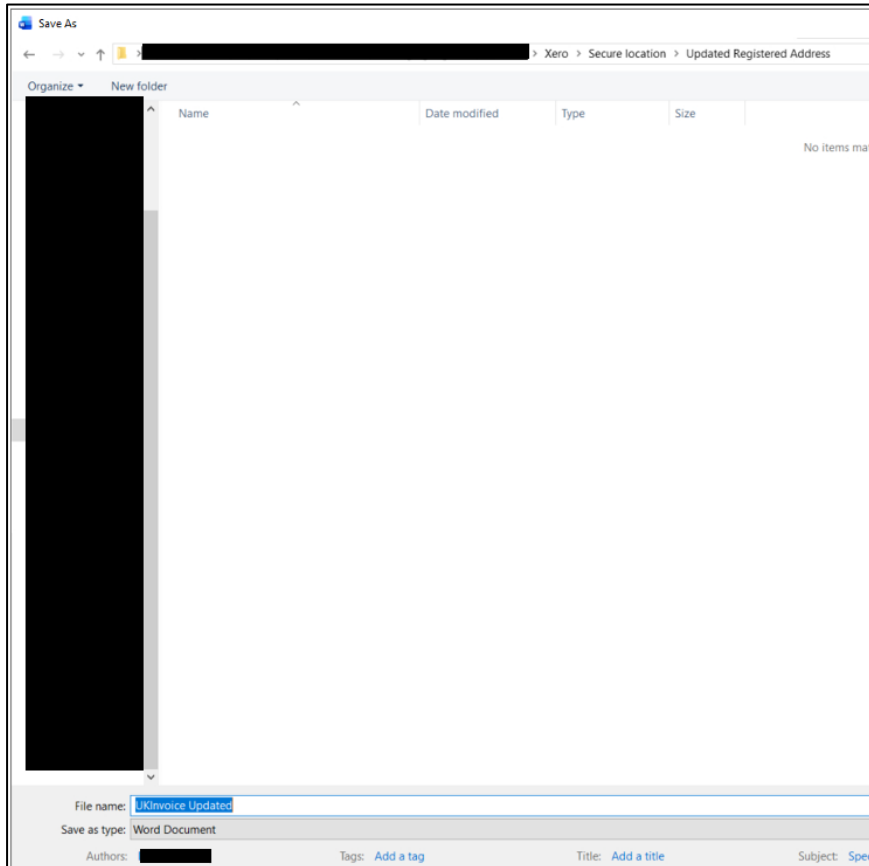
Step 8. Save a copy of the Invoice template into a secure location

File -> Save as -> '(Secure location)' -> Save

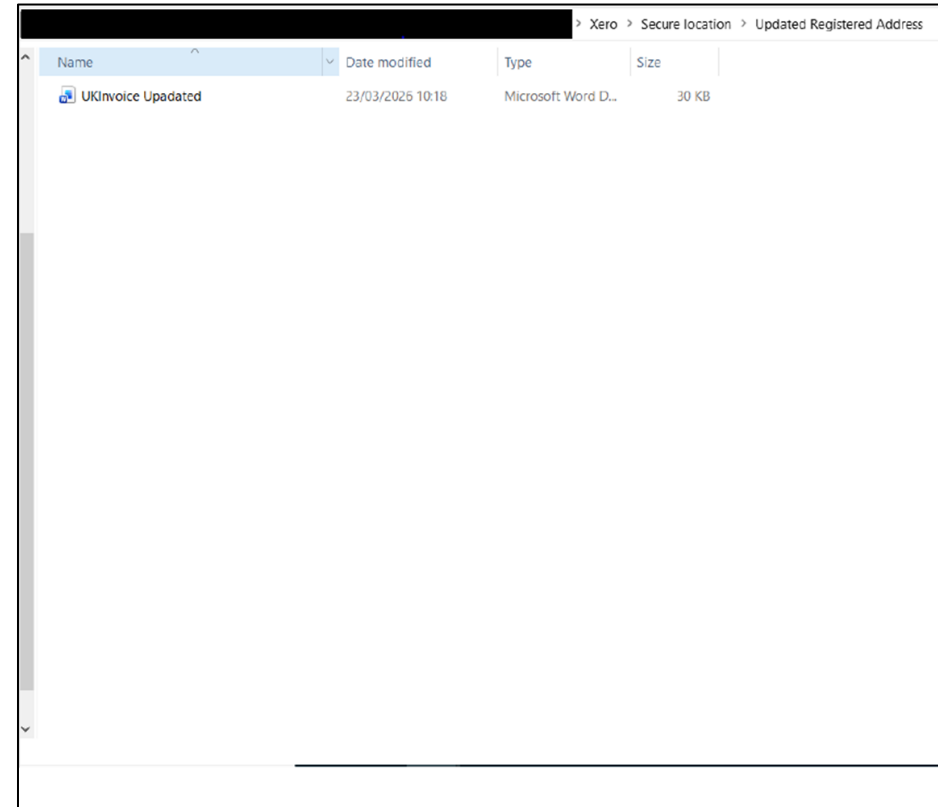
a.



b.



c.



Step 9. On the saved copy, change the registered address to the Updated/New registered address

The screenshot shows the Microsoft Word interface with the **Header & Footer** ribbon selected. The ribbon includes options for Header, Footer, Page Number, Date & Time, Document Info, Quick Parts, Pictures, Online Pictures, Navigation (Previous, Next, Link to Previous), Options (Different First Page, Different Odd & Even Pages, Show Document Text), Position (Header from Top: 1.25 cm, Footer from Bottom: 0.65 cm, Insert Alignment Tab), and Close (Close Header and Footer). The main document area displays a payment advice form template with the following content:

Due Date: «InvoiceDueDate»

«PaymentImage»
«PaymentMessageAndUrl»

First Page Footer

PAYMENT ADVICE

To: «OrganisationName»
«OrganisationPostalAddress»

Customer	«ContactName»
Invoice Number	«InvoiceNumber»
Amount Due	«InvoiceAmountDue»
Due Date	«InvoiceDueDate»
Amount Enclosed	_____

Enter the amount you are paying above

Updated/New Registered Address|

Page 1 of 1 643 words English (New Zealand) Text Predictions: On Accessibility: Investigate Display Settings Focus 160%

Step 10. Upload the updated file onto Xero

Select Upload on Xero -> Select saved copy of invoice template -> Upload

a.

The screenshot shows the Xero Invoice Settings page. The 'Special projects' section is active, displaying page settings (A4 Margins Top: 1.35 cm Bottom: 1.00 cm Address Padding: 1.00 cm Font: Calibri, 9pt) and a 'Contact Details' field with a redacted area and an orange image. Below this, there are 'Show:' options for tax numbers, column headings, tax columns, unit price and quantity, payment advice cut-away, registered address, logo, and discount. The 'Registered address' section is also visible, showing a table of templates for Invoice, Credit Note, Statement, Purchase Order, and Quote, with 'Download' and 'Upload' buttons for each.

b.

This screenshot shows the same Xero Invoice Settings page as in (a), but with an 'Upload .docx Templates' dialog box open in the foreground. The dialog box prompts the user to 'Upload one or more templates. Each file can be no larger than 1MB.' It lists categories: Invoice, Quote, Credit Note, Statement, and Purchase Order, each with a 'Browse' button and 'No file selected' text. At the bottom of the dialog are 'Upload' and 'Cancel' buttons. In the background, a file explorer window is open, showing a folder named 'Updated Registered...' containing a file named 'UKInvoice Updated' with a date modified of '23/03/2026 10:18'.

c.

This screenshot shows the Xero Invoice Settings page with the 'Upload .docx Templates' dialog box open. The 'Invoice' category is selected, and the file 'UKInvoice Updated.docx' is listed. The dialog box also shows 'Quote', 'Credit Note', 'Statement', and 'Purchase Order' categories, each with 'Browse' buttons and 'No file selected' text. The 'Upload' and 'Cancel' buttons are at the bottom. The background shows the same Xero settings page as in (a) and (b).

Step 12. Select the updated branding theme





← You're currently using the demo company. Go back to your last organization.

xero Demo Company (UK) Home Sales Purchases Reporting Payroll Accounting Tax Contacts Projects

Sales overview > Invoices

Edit invoice INV-0047 Draft All changes saved as draft Preview Save & close Approve & email

86% of customers say they prefer to pay via credit and debit card
Add online payments to your invoices. Get paid up to twice as fast.

VISA     Add online payments

Contact: 7-Eleven | Issue date: 23 Mar 2026 | Due date: 23 Mar 2026 | Invoice number: # INV-0047 | Reference: Checking for registered address | Branding theme: Registered address

Online payments: PayPal | Currency: British Pound | Amounts are: Tax inclusive | [Add contact's last items](#)

Item	Description	Qty.	Price	Disc.	Account	Tax rate	Tax amount	Region	Project
⋮									

Add row Columns (0 hidden) Attach files

Subtotal 0.00
Includes VAT 0.00
Total 0.00

History and notes Add note

Send as an eInvoice
Add the VAT Number of your

Step 13. Select Preview

← You're currently using the demo company. Go back to your last organization.

xero Demo Company (UK) Home Sales Purchases Reporting Payroll Accounting Tax Contacts Projects

Sales overview > Invoices

Edit invoice INV-0047 Draft All changes saved as draft

Preview Save & close Approve & email

86% of customers say they prefer to pay via credit and debit card
Add online payments to your invoices. Get paid up to twice as fast.

VISA MASTERCARD AMERICAN EXPRESS Apple Pay Google Pay Add online payments

Contact: 7-Eleven | Issue date: 23 Mar 2026 | Due date: 23 Mar 2026 | Invoice number: # INV-0047 | Reference: Checking for registered address | Branding theme: Registered address

Online payments: PayPal | Currency: British Pound | Amounts are: Tax inclusive | [Add contact's last items](#)

Item	Description	Qty.	Price	Disc.	Account	Tax rate	Tax amount	Region	Project	Amount GBP
							Subtotal			0.00
							Includes VAT		0.00	
							Total			0.00

Columns (0 hidden) | Attach files

History and notes Add note

Send as an invoice
Add the VAT Number of your

Step 14. Inspect address is correct on new Invoice template

Invoice preview

Invoice settings [Download PDF](#)

1 of 1

DRAFT INVOICE

7-Eleven

Invoice Date
23 Mar 2026

Account Number

Invoice Number
INV-0047

Reference
Checking for registered address

VAT Number
GB 123456789

Customer 7-Eleven
Invoice Number INV-0047
Amount Due 0.00
Due Date 23 Mar 2026
Amount Enclosed
Enter the amount you are paying above

Demo Company (UK)
23 Main Street
Central City
Marineville
MV12 3CC

Description	Quantity	Unit Price	VAT	Amount GBP
		0.00		
			Subtotal	0.00
			Invoice Total GBP	0.00
			Total Net Payments GBP	0.00
			Amount Due GBP	0.00

Due Date: 23 Mar 2026

PAYMENT ADVICE

To: Demo Company (UK)
23 Main Street
Central City
Marineville
MV12 3CC

Updated/New Registered Address

Step 15. Update mailing address to match registered address.

Company dropdown -> Settings -> Organization details

a.

The screenshot shows the Xero dashboard for 'Demo Company (UK)'. The top navigation bar includes 'Home', 'Sales', 'Purchases', 'Reporting', 'Payroll', 'Accounting', 'Tax', 'Contacts', and 'Projects'. A dropdown menu is open from the 'Demo Company (UK)' dropdown, showing options for 'Files' and 'Settings'. Below this is a search bar for organizations and a list of 'RECENT ORGANIZATIONS'. The main dashboard area displays a 'Business Savings Account' summary with 'Statement balance (Jan 1)' and 'Balance in Xero', a 'Balance difference' bar chart, and an 'Import bank statement' button. There are also 'Bills to pay' and 'Tasks' sections. The URL at the bottom is <https://go.xero.com/BankRec/BankRec.aspx?accountID=bd9e85e0-0478-433d-...>

b.

The screenshot shows the 'Settings' page in Xero. At the top, a message reads 'You're currently using the demo company. Go back to your last organization.' The navigation bar is the same as in screenshot 'a'. The 'Settings' page is divided into several sections: 'General' (Organization details, Users, Connected apps, Email settings), 'Sales' (Invoice settings, Online payments), and 'Purchases' (Online bill payments). The 'Organization details' section is highlighted, indicating the next step in the process.

Step 16. Change contact information address to match registered address

Contact Information

Mailing address

Updated

Registered

Address

State

United Kingdom

Attention

Physical address Same as mailing address

Search address

Street address

City

State

Country

Attention

Telephone

+44