



Xrero Sales

Quotations, Sales Orders & Invoicing — User Manual

For sales teams & administrators

United Arab Emirates edition

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Every screen in this manual reproduces the live Xrero Sales module. All names and content shown are demonstration data.

1. Introduction & how it works

Xrero Sales takes a deal from a price quote to a paid invoice. You build a **quotation**, send it to the customer, and when they accept it becomes a confirmed **sales order**. From the order you arrange **delivery** and raise the **invoice** — all linked, all in AED with 5% UAE VAT applied automatically.

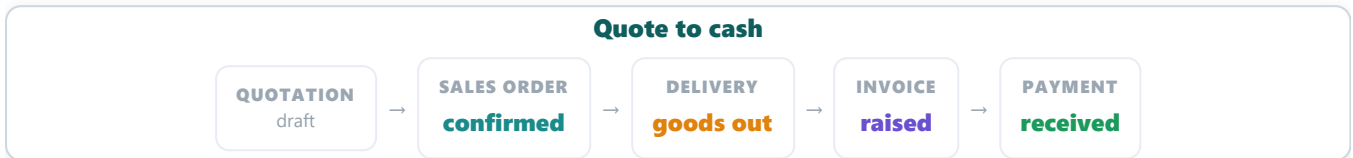


Figure 1.1 — The full sales flow: quotation → order → delivery → invoice → payment.

This manual is for **salespeople** who raise and manage quotations and orders, and **administrators** who set up products, pricelists and templates.

Good to know

Sales is fully connected: confirming an order can create a delivery in Inventory and an invoice in Accounting, with no re-typing.

2. Getting Started & the menu

Open **Sales** from the apps menu. The top menu is organised by job.

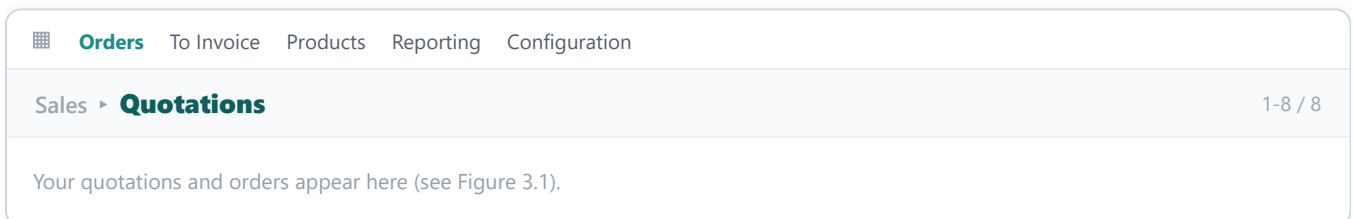


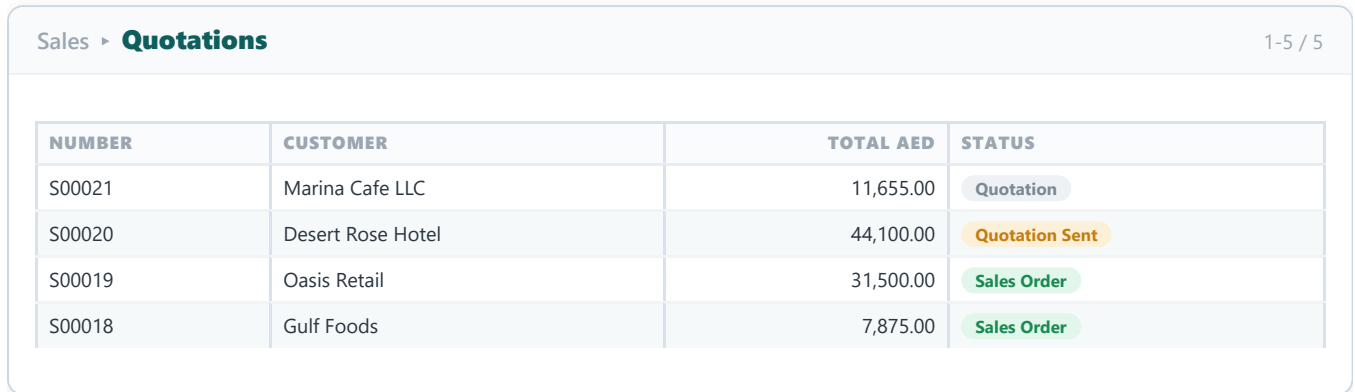
Figure 2.1 — The Sales menu.

Menu	What you'll find there
Orders	Quotations, Sales Orders and Customers.
To Invoice	Orders waiting to be invoiced or upsold.
Products	Your products, variants and pricelists.
Reporting	Sales analysis dashboards.
Configuration	Settings, payment terms, quotation templates.

3. The Quotations list

Menu path: Sales ▶ Orders ▶ Quotations

Every quotation and order lives here with its number, customer, total and status. A document moves from **Quotation** → **Quotation Sent** → **Sales Order** (when confirmed).



NUMBER	CUSTOMER	TOTAL AED	STATUS
S00021	Marina Cafe LLC	11,655.00	Quotation
S00020	Desert Rose Hotel	44,100.00	Quotation Sent
S00019	Oasis Retail	31,500.00	Sales Order
S00018	Gulf Foods	7,875.00	Sales Order

Figure 3.1 — The Quotations list: number, customer, total and status.

4. Creating a quotation

Click **New**. Choose the **Customer** — their address, payment terms and pricelist fill in automatically — set an **Expiration** date if you want, then add the products on the order lines.

- 1 Click **New**; a draft quotation opens.
- 2 Pick the **Customer**.
- 3 Add products on the **Order Lines** tab (Chapter 5).
- 4 Check the total, then **Send by Email** or **Confirm**.



Quotations ▶ **New** Draft

Send by Email **Confirm** Quotation Sent Sales Order

Customer	Marina Cafe LLC
Expiration	2026-06-05
Pricelist	Default (AED)
Payment Terms	30 Days

Figure 4.1 — A new quotation with the customer's defaults filled in.

5. Order lines — adding products

On the **Order Lines** tab, add a product per row. Pick the product (its description and price fill in), set the **quantity**, and the line total — and the order total — update live.

S00021 ▶ Order Lines Draft				
PRODUCT	QTY	UNIT AED	DISC.	SUBTOTAL
Espresso Machine Pro	2	4,500.00	0%	9,000.00
Grinder X	1	2,100.00	0%	2,100.00

Figure 5.1 — Order lines: one product per row, totals updating live.

6. Prices, discounts & VAT

Each line shows the unit price, an optional **discount %**, and the tax. Xrero applies **5% UAE VAT** automatically, and the footer breaks out **Untaxed Amount**, **VAT** and **Total** in AED. You can override a unit price or discount per line where you have permission.

Untaxed Amount	AED 11,100.00
VAT 5%	AED 555.00
Total	AED 11,655.00

Figure 6.1 — The totals footer: untaxed, 5% VAT and grand total in AED.

7. Sections, notes & optional products

Make long quotations readable: add a **Section** heading to group lines (e.g. "Equipment", "Installation"), a **Note** to explain a line, and **Optional Products** the customer can add themselves online — a gentle up-sell.

S00021 ▶ Order Lines		with sections
▶ Equipment		
Espresso Machine Pro × 2		9,000.00
▶ Installation		
On-site setup		600.00
Note: includes 1-year warranty.		

Figure 7.1 — Sections and notes structure a quotation for easy reading.

8. Sending the quotation

Click **Send by Email**. Xrero opens a pre-filled message with the quotation PDF attached and a link to view it online. The quotation status becomes **Quotation Sent** so you know it's with the customer.

Send quotation

To info@marinacafe.ae

Subject Quotation S00021 — AED 11,655

Attachment 📎 S00021.pdf

Send

Figure 8.1 — The send dialog with the quotation PDF attached.

9. Online acceptance & signature

The link lets the customer view the quotation in their browser, choose any **optional products**, then **Sign & Pay** or **Accept** online. Their acceptance (and optional online payment) confirms the order without a phone call.

Quotation S00021
AED 11,655

Espresso Machine Pro × 2 — Grinder X × 1

Accept & Sign
Reject

Figure 9.1 — The customer's online quotation with Accept & Sign.

10. Confirming the order

Whether the customer accepts online or you confirm on their behalf, click **Confirm**. The document becomes a **Sales Order**, the date is stamped, and downstream actions (delivery, invoice) unlock.

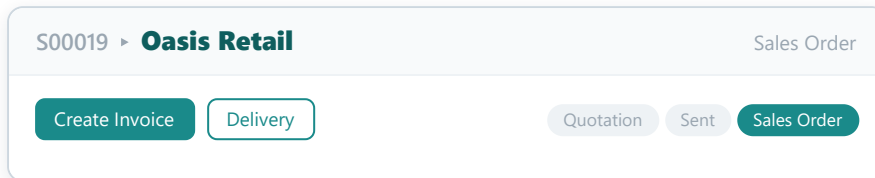


Figure 10.1 — A confirmed sales order, with Delivery and Create Invoice now available.

11. The sales order

The sales order is the contract. Its **Other Info** tab holds the salesperson, team, payment terms and delivery address; smart buttons link to the **Delivery** and **Invoices** it generates. Everything about the deal is reachable from here.

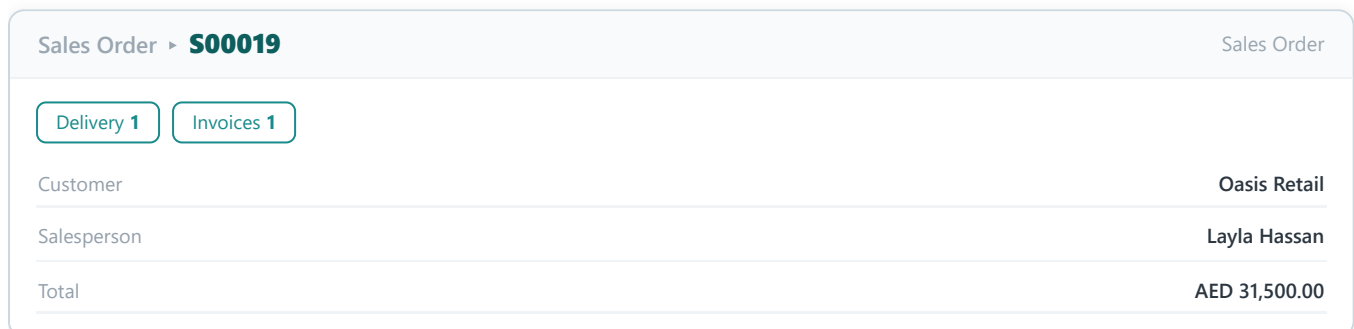


Figure 11.1 — The sales order with smart buttons to its delivery and invoices.

12. Delivery

If the order contains stockable products, confirming it creates a **delivery order** in Inventory. Your warehouse picks and ships the goods and validates it; the sales order then knows what's been delivered — which can drive invoicing.

Delivery ▸ **WH/OUT/0042** Ready

PRODUCT	DEMAND	DONE
Shelving Unit	10	10

[Validate](#)

Figure 12.1 — The delivery order generated from the sale (handled in Inventory).

13. Invoicing

Click [Create Invoice](#). Choose to invoice the **regular** (ordered) quantities, only the **delivered** quantities, or a **down payment**. Xrero drafts the customer invoice in Accounting — review and **Confirm** it to post.

Create invoice

Regular invoice selected

Down payment (%)

Down payment (fixed)

[Create Draft Invoice](#)

Figure 13.1 — The invoicing dialog: regular, delivered, or a down payment.

14. Down payments

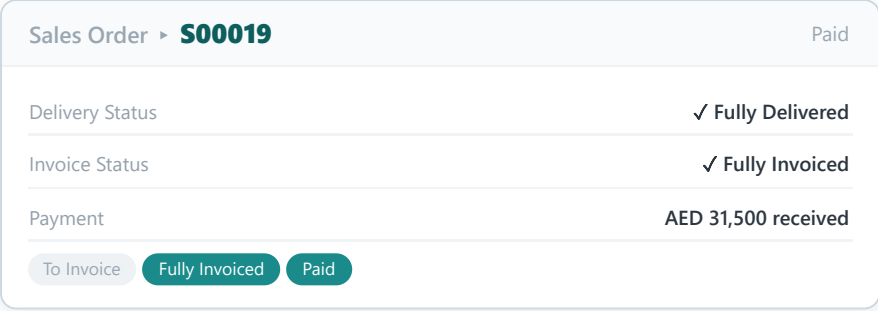
For large orders you can bill a **down payment** first — a percentage or a fixed AED amount — and invoice the balance on delivery. Each down-payment invoice is deducted from the final invoice, so the customer never pays twice.

Down payment	30% = AED 9,450
Balance on delivery	AED 22,050

Figure 14.1 — A 30% down payment, with the balance billed later.

15. Payment & follow-up

Once the invoice is posted, the customer pays and you register the payment in Accounting; the order's invoice status becomes **Fully Invoiced / Paid**. The sales order carries two status badges so you always know where it stands — a **delivery status** (Nothing / Partially / Fully Delivered) and an **invoice status** (Nothing to Invoice / To Invoice / Fully Invoiced). Overdue invoices are chased by the follow-up tools — see the Accounting manual for registering payments and reminders.



Sales Order ▶ **S00019** Paid

Delivery Status	✓ Fully Delivered
Invoice Status	✓ Fully Invoiced
Payment	AED 31,500 received

To Invoice Fully Invoiced Paid

Figure 15.1 — The order's delivery and invoice status badges, settled after payment.

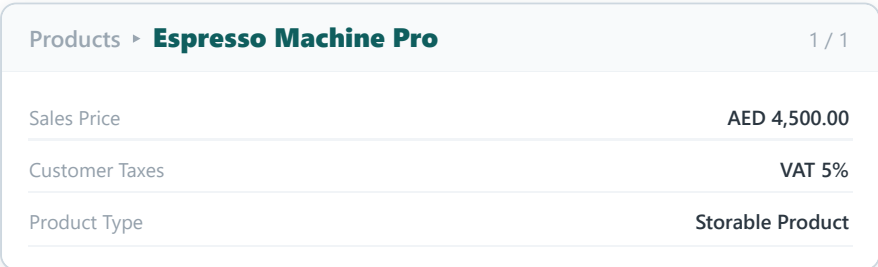
Cross-module

Sales hands invoicing and payment to Accounting. The numbers flow automatically — no re-keying.

16. Products & variants

Menu path: Sales ▶ Products ▶ Products

A product holds its **sales price**, **taxes**, unit of measure and whether it's a stockable good or a service. **Variants** handle options like size or colour from a single product — so "T-Shirt (Red, L)" and "T-Shirt (Blue, M)" share one template.



Products ▶ **Espresso Machine Pro** 1 / 1

Sales Price	AED 4,500.00
Customer Taxes	VAT 5%
Product Type	Storable Product

Figure 16.1 — A product record with sales price, tax and type.

17. Pricelists

Menu path: Sales ▶ Products ▶ Pricelists

Pricelists set different prices for different customers or situations — a wholesale rate, a loyalty discount, a promotional price for a date range. The right pricelist is chosen automatically by customer, and the quotation uses it.

Pricelists > Wholesale (AED)		1 / 1
RULE	APPLIES TO	PRICE
10% off	All products	-10%
Fixed	Espresso Machine Pro	AED 4,200

Figure 17.1 — A wholesale pricelist with percentage and fixed-price rules.

18. Quotation templates

Menu path: Sales > Configuration > Quotation Templates

If you sell the same package often, save it as a **quotation template** — preset lines, optional products and terms. Starting a quote from a template fills everything in, so you only adjust the customer and quantities.

Quotation Templates > Cafe Starter Pack		1 / 1
Espresso Machine Pro × 1	4,500.00	
Grinder X × 1	2,100.00	
Optional: On-site setup	600.00	

Figure 18.1 — A quotation template pre-fills lines and optional products.

19. Customers

Menu path: Sales > Orders > Customers

Each customer holds their billing & delivery addresses, default pricelist, payment terms and TRN (tax registration number). Their record shows all quotations, orders and invoices — and their total sales — so you always have context.

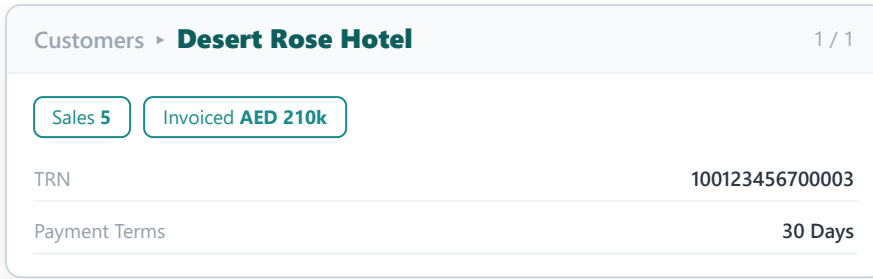


Figure 19.1 — A customer with TRN, terms and links to all their sales.

20. Sales teams & targets

Orders belong to a **sales team** and a **salesperson**. Managers set monthly **targets** per team and track progress, so everyone knows where they stand against goal. Teams are shared with CRM (see the CRM manual).

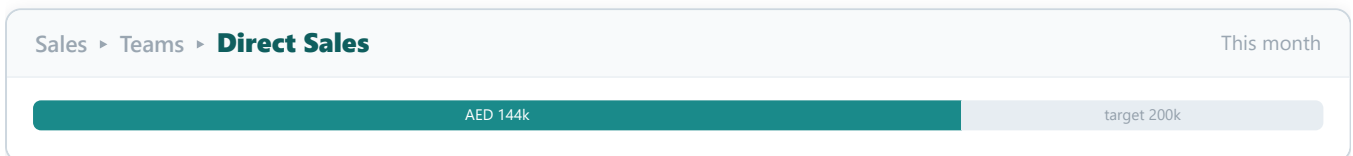


Figure 20.1 — A team tracking sales against the monthly target.

21. Reporting

Menu path: Sales ▸ Reporting

Sales Analysis slices your orders by product, customer, salesperson or month — as charts, pivots or lists. Spot best-sellers, watch margins and compare periods to plan ahead.

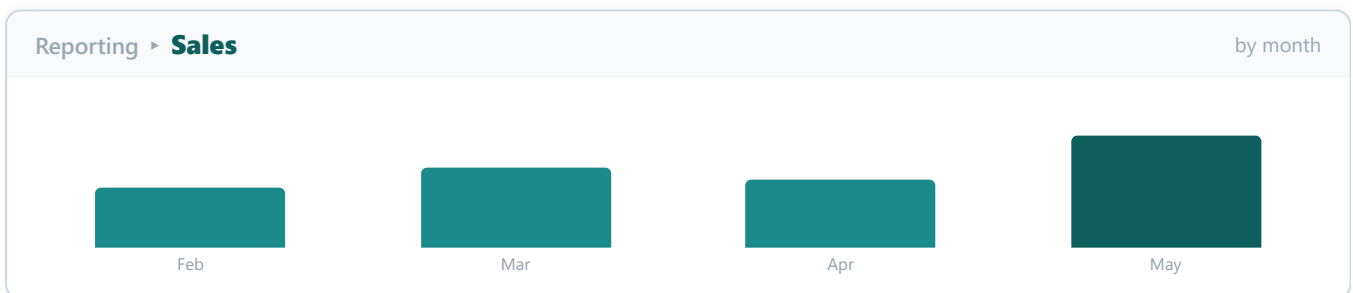


Figure 21.1 — Sales Analysis: revenue by month, with May highlighted.

22. Configuration

Menu path: Sales ▸ Configuration

Admins enable features here: **quotation templates, online signature & payment, pricelists, units of measure**, default **payment terms** and the invoicing policy (ordered vs delivered quantities). Set these once to match how you sell. The Settings screen below is where each toggle lives.

Sales > Settings		Configuration
Default Invoicing Policy		Delivered quantities
Online Signature		✓ Enabled
Pricelists		✓ Enabled
Quotation Templates		✓ Enabled

Figure 22.1 — The Sales Settings screen for the options below.

Setting	Controls
Invoicing Policy	Invoice ordered or delivered quantities by default.
Online Signature/Payment	Let customers accept & pay quotations online.
Pricelists	Enable multiple price rules.
Quotation Templates	Reusable quotation packages.
Payment Terms	Default due dates (e.g. 30 Days).

23. Tips & best practices

Quote faster and get paid sooner with these habits — summarised here, then explained.






Sales — quick reference					cheat sheet
 CUSTOMER FIRST defaults auto-fill	 SECTIONS & NOTES clearer quotes	 OPTIONAL PRODUCTS easy up-sell	 TEMPLATES quote in seconds	 EXPIRY DATES chase before lapse	

Figure 23.1 — The sales quoting cheat sheet at a glance.

- **Set the customer first** — their pricelist, terms and addresses then auto-fill.
- **Use sections & notes** — a clear quotation wins more often.
- **Offer optional products** — easy up-sells the customer adds themselves online.
- **Template repeat packages** — quote in seconds, not minutes.
- **Choose the right invoicing policy** — bill delivered quantities when you part-ship.
- **Watch expiration dates** — chase quotations before they lapse.

24. Glossary

The journey in four words: a **quotation** is confirmed into a **sales order**, which creates a **delivery** and an **invoice**.

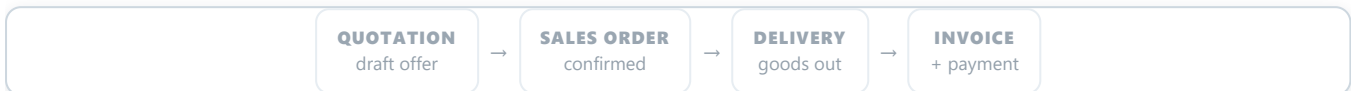


Figure 24.1 — How the glossary terms connect across the sales flow.

Term	Meaning
Quotation	A draft price offer to a customer.
Sales Order	A confirmed quotation — the agreed deal.
Order Line	One product row on a quotation/order.
Pricelist	Rules that set prices per customer or situation.
Down Payment	A partial invoice billed up front.
Delivery Order	The warehouse shipment created from a sale.
Invoicing Policy	Whether to bill ordered or delivered quantities.
Quotation Template	A reusable preset quotation.
Variant	A product option (size, colour) of one template.
TRN	The customer's UAE tax registration number.

25. FAQ & troubleshooting

The issues we're asked about most, with the first thing to check:

Troubleshooting		common fixes
SYMPTOM	FIRST THING TO CHECK	
VAT not showing	Product's Customer Taxes = 5%	
No delivery created	Product must be Storable	
Want a deposit	Create Invoice → Down payment	
Special price	Assign a pricelist to the customer	

Figure 25.1 — Common sales issues and the first thing to check.

What's the difference between a quotation and a sales order?

A **quotation** is a draft offer; once confirmed it becomes a **sales order** — the agreed contract that unlocks delivery and invoicing.

Why is VAT not showing?

Check the product's **Customer Taxes** is set to VAT 5%, and that the customer/fiscal position isn't zero-rated.

The customer wants to pay a deposit.

Use `Create Invoice ▶ Down payment` for a percentage or fixed amount, then bill the balance later.

How do I give a special price to one customer?

Create a **pricelist** with the rule and assign it to that customer; their quotations then use it automatically.

Can the customer accept online?

Yes — enable online signature/payment, then `Send by Email`; the customer accepts (and can pay) from the link.

I confirmed but no delivery appeared.

Deliveries are only created for **storable** products. Services don't ship.

Need help?

Contact your Xrero administrator or visit xrero.com.