## XAGLE HUB



# SETUP CHECKLIST

While you can jump right in and start using Xagle, taking a few minutes to set up your key System, User, and Company preferences will help ensure everything runs as smoothly as possible. A little upfront setup can go a long way in avoiding workflow hiccups and maximizing your efficiency from the start.

	→ General UI & System Settings	Payments & Taxes	
	Set <b>Header Name</b>	Set Payment Allowances	
	Choose Default <b>Company</b> & <b>Per Page</b> Cou	nt Configure Default Tax Rates	
	Select <b>Color Scheme</b> (Dark / Light)	Enable VAT ID	
	Choose a <b>Color Theme</b>	<ul><li>Set preferred tax rates first via •</li></ul>	
S S	Show or hide <b>Icons</b> on Side Menu	• Gear Icon > Configuration > Tax Rates	
	Set Localization & Time Zone	<ul> <li>Once configured, select from</li> </ul>	
S	Confirm <b>Currency</b> Information	dropdown in this section	
_	Adjust <b>Security</b> Options		
S L	Configure System Dashboard	Email Settings	
≨	– Set Default Date Range		
<u>П</u>	<ul><li>- Choose Visible KPIs &amp; Widgets</li></ul>	Set your <b>"Mail From Name"</b> & <b>"Reply-T</b>	
SYSIEM		Email Address"	
<i>∧</i>	Invoices, Quotes & Related Docs	Customize <b>Email Templates</b> (optional): Quotes, Proforma Invoices, Invoices,	
Z	Set Default Formatting:	Credit Memos, Overdue Notices, Paymer	
2	• Style	Receipts, Upcoming Payment Reminders	
_	<ul> <li>Terms &amp; Conditions</li> </ul>		
× ×	<ul> <li>Footers</li> </ul>	✓ Xagle includes friendly defaults. Feel free	
. J	Choose which Automations to turn On/Off	to adjust for your brand voice.	
ONFIGURALION	Set Document Conversion Options		
Z	• (e.g., Quote → Invoice)		
$\supset$	Configure Linked Doc Expiration & Deletion	n Options	





SIGN-IN

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### **XAGLE HUB**



### SETUP CHECKUST

Client & Product Data

G S	Conline Payments
CONFIGURATION > SYSTEM SETTIN	<ul> <li>Link Payment Processors:         <ul> <li>Mollie</li> <li>PayPal</li> <li>Square</li> <li>Stripe</li> <li>✓ This enables &amp; establishes where payments are processed from "Pay Online" button on invoices.</li> <li>Enable Bank Transfers (Yes/No)</li> <li>Allow customers to notify you of transfers</li> <li>You must confirm manually to complete the payment</li> </ul> </li> <li>Set Online Payment Fees         <ul> <li>Enter % rate</li> <li>Choose how it displays on receipts</li> <li>Configure Automatic Payment Processing by Status</li> </ul> </li> </ul>
	As a Xagler Pro, you're given access to advance
	Enable Company Profiles

**Enable Advanced Payment Terms** 

Privacy Policy

**Enable Client Portals** 

Import client and product data by adding
entries individually, uploading CSV files
directly, or let our support team assist you.

https://xagle.com/request-data-transfer

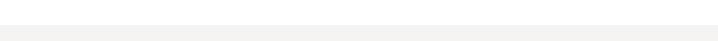
$\bigcirc$	Clients
$\bigcirc$	Quotes & Invoices
$\bigcirc$	Payments
$\bigcirc$	Expenses
$\bigcirc$	Products & Services

Submit a transfer request at

#### **PRO Company Profiles:**

As a Xagler Pro, manage multiple businesses or income streams from one simple dashboard. Set up Company Profiles before adding clients and products to ensure proper organization and accurate executive summaries of each business's activity.

$\bigcirc$	Document Templates
$\bigcirc$	Email Preferences
$\bigcirc$	Banking & Billing Details
$\bigcirc$	Client & Product Information



SIGN-IN

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