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.

CONFIGURATION > SYSTEM SETTINGS

🔧 General UI & System Settings

- ◯ Set **Header Name**
- ◯ Choose Default **Company** & **Per Page** Count
- ◯ Select **Color Scheme** (Dark / Light)
- ◯ Choose a **Color Theme**
- ◯ Show or hide **Icons** on Side Menu
- ◯ Set **Localization & Time Zone**
- ◯ Confirm **Currency** Information
- ◯ Adjust **Security** Options
- ◯ Configure **System Dashboard**
  - – Set Default Date Range
  - – Choose Visible KPIs & Widgets

🧾 Invoices, Quotes & Related Docs

- ◯ Set Default Formatting:
  - Style
  - Terms & Conditions
  - Footers
- ◯ Choose which Automations to turn On/Off
- ◯ Set Document Conversion Options
  - *(e.g., Quote → Invoice)*
- ◯ Configure Linked Doc Expiration & Deletion Options

💵 Payments & Taxes

- ◯ Set Payment Allowances
- ◯ Configure Default Tax Rates
- ◯ Enable VAT ID
- ◯ 🔹 Set preferred tax rates first via 🔹
  - *Gear Icon* > *Configuration* > *Tax Rates*
  - Once configured, select from dropdown in this section

📧 Email Settings

- ◯ Set your **"Mail From Name"** & **"Reply-To Email Address"**
- ◯ Customize **Email Templates** (optional): Quotes, Proforma Invoices, Invoices, Credit Memos, Overdue Notices, Payment Receipts, Upcoming Payment Reminders

✓ *Xagle includes friendly defaults. Feel free to adjust for your brand voice.*

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CONFIGURATION > SYSTEM SETTINGS

Online Payments

- ◯ Link Payment Processors:
  - ◯ Mollie
  - ◯ PayPal
  - ◯ Square
  - ◯ Stripe
- ◯ ✓ *This enables & establishes where payments are processed from "Pay Online" button on invoices.*
- ◯ Enable Bank Transfers (Yes/No)
  - ◯ Allow customers to notify you of transfers
  - *You must confirm manually to complete the payment*
- ◯ Set Online Payment Fees
  - Enter % rate
  - Choose how it displays on receipts
  - Configure Automatic Payment Processing by Status

PRO Advanced

As a Xagler Pro, you're given access to advance

- ◯ Enable Company Profiles
- ◯ Enable Advanced Payment Terms
- ◯ Enable Client Portals

CONFIGURATION > COMPANY PROFILES

Client & Product Data

Import client and product data by adding entries individually, uploading CSV files directly, or let our support team assist you. Submit a transfer request at https://xagle.com/request-data-transfer

- ◯ Clients
- ◯ Quotes & Invoices
- ◯ Payments
- ◯ Expenses
- ◯ Products & Services

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.

- ◯ Document Templates
- ◯ Email Preferences
- ◯ Banking & Billing Details
- ◯ Client & Product Information