



Social Soul

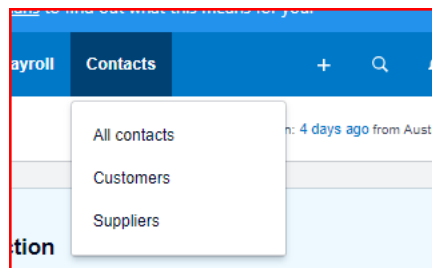
## Standard Operating Procedure

### Setting up a New Customer

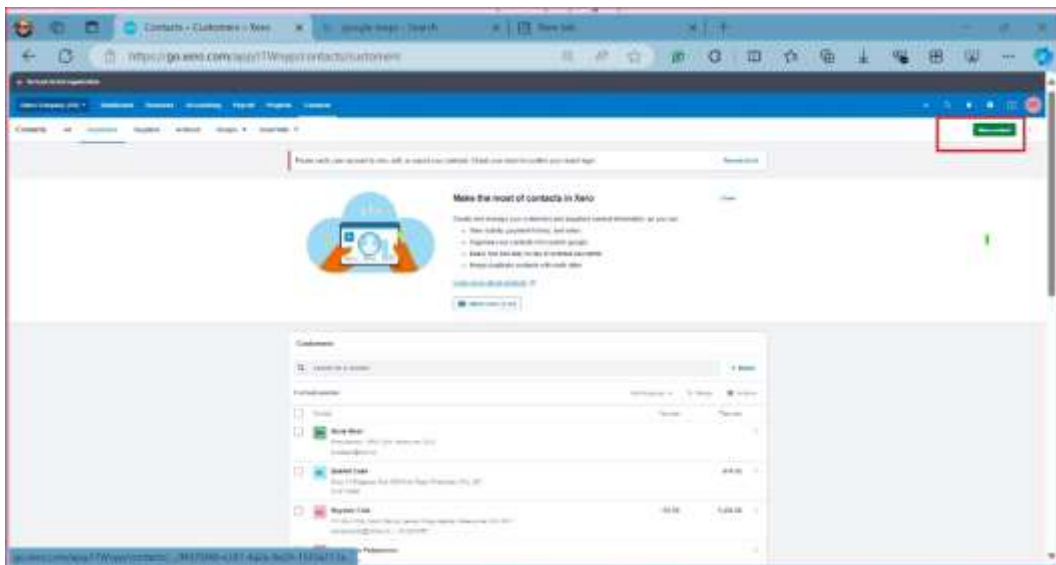
#### Assessor Instructions

The response provided by the student must include the following steps and images.

1. Log in to Xero
2. From the drop-down menu, select Customer



3. Click New contact.



Under Contact details, enter:

- Contact details

### Contact details

Contact name (required)

Luxury Hampers

Account number

LH-00101

Add a unique account number to identify, reference and search for the contact.

- Primary person

### Primary person

First name

Leslie

Last name

Pollick

Email

✉ sales@luxuryhampers.com

- Business information

**Business information**

Phone number

|     |    |           |   |
|-----|----|-----------|---|
| +61 | 02 | 9987 4532 | × |
|-----|----|-----------|---|

[+ Add phone number](#)

Website

ABN

You can [search for the contact's ABN here](#)

ACN

You can [search for the contact's ACN here](#)

Notes 0/4000

Notes can only be viewed by people in your organisation

- Address

**Addresses**

**Billing address** ⋮

15 Harrison St  
MARRICKVILLE, 2204  
NSW  
Australia

**Delivery address** ⋮

15 Harrison St  
MARRICKVILLE, 2204  
NSW  
Australia

- Sales default

### Sales defaults

Defaults can be overridden on individual invoices, quotes, and receive money

Sales account  
200 - Sales ×

Invoice due date  
14 day(s) after the invoice date ▼

Amounts are  
Tax inclusive ▼

Sales GST  
GST on Income ▼

Discount  
1.5 %

Credit limit amount  
3000

Block new invoices when credit limit is reached

Xero network key  
⊙

4. Click Save & close.