

Xagle Hub X 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	<u>\$</u>	Payments & Taxes	
(Set Header Name	\bigcirc	Set Payment Allowances	
(Choose Default Company & Per Page Count	\bigcirc	Configure Default Tax Rates	
(Select Color Scheme (Dark / Light)	\bigcirc	Enable VAT ID	
(Choose a Color Theme	\bigcirc	 Set preferred tax rates first via 	
S	Show or hide Icons on Side Menu		• Gear Icon > Configuration > Tax Rates	
5	Set Localization & Time Zone		Once configured, select from	
SELLING.	Confirm Currency Information		dropdown in this section	
_ (Adjust Security Options			
S T	Configure System Dashboard	E	Email Settings	
>	– Set Default Date Range			
× γ γ γ γ γ	- Choose Visible KPIs & Widgets	\bigcirc	Set your "Mail From Name" & "Reply-To	
ク			Email Address"	
> ク	Invoices, Quotes & Related Docs		Customize Email Templates (optional):	
٨			Quotes, Proforma Invoices, Invoices,	
7 (Set Default Formatting:		Credit Memos, Overdue Notices, Payment	
S C	Style		Receipts, Upcoming Payment Reminders	
_	Terms & Conditions			
∢ ⊻	 Footers 		✓ Xagle includes friendly defaults. Feel free	
ONFIGURATION	Choose which Automations to turn On/Off		to adjust for your brand voice.	
- (Set Document Conversion Options			
Z	• (e.g., Quote → Invoice)			
) (Configure Linked Doc Expiration & Deletion Opt	ions		







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Online Payments

\bigcirc	Link Payment Processors:	Import o entries ii
\bigcirc	• Mollie	directly,
\bigcirc	• PayPal	Submit of https://x
\bigcirc	• Square	<u>11005.77X</u>
\bigcirc	• Stripe	\bigcirc (
\bigcirc	√ This enables & establishes where payments are	\bigcirc
\bigcirc	processed from "Pay Online" button on invoices.	○ F
\bigcirc	Enable Bank Transfers (Yes/No)	
\bigcirc	Allow customers to notify you of transfers	○ F
	You must confirm manually to complete the	
	payment	
\bigcirc	Set Online Payment Fees	
	• Enter % rate	
	Choose how it displays on receipts	PRO
	Configure Automatic Payment Processing	As a Xa
	by Status	busines
		simple (Profiles
		produc
PRO	Advanced	and acc
As a	Xagler Pro, you're given access to advanced	each bu

features that unlock limitless potential and control when it comes to scaling, team collaboration and

Enable Advanced Payment Terms

Enable Company Profiles

Enable Client Portals

customer engagement.

Client & Product Data

client and product data by adding ndividually, uploading CSV files or let our support team assist you. a transfer request at

agle.com/request-data-transfer

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

Company Profiles:

gler Pro, manage multiple ses or income streams from one dashboard. Set up Company before adding clients and ts to ensure proper organization curate executive summaries of

eacr	i business's activity.
\bigcirc	Document Templates
\bigcirc	Email Preferences
\bigcirc	Banking & Billing Details
\bigcirc	Client & Product Information





SIGN-IN