Smarter Xero

Duration: 1 day

TARGET AUDIENCE
This one-day course is intended for people who need to know how to sort out issues, use features to work smarter in Xero, and understand some fundamentals of bookkeeping.

LEARNING OUTCOMES
The skills and knowledge covered in this course are sufficient to help you understand terminology used in Bookkeeping, and broaden your skills and knowledge in using Xero more effectively day-to-day.

Bookkeeping Concepts
Bookkeeping terminology
Account Types
The Accounting Equation
Cash v Accrual
Key Financial Reports

Overview
System Requirements and troubleshooting
Sign up and Login
Working with Others
Adding and Inviting Users
Getting Help
Dashboard and menu overview
Tips for getting around Xero

Your Xero Dashboard
Account Watchlist
Money Coming In
Money Going Out
Expense Claims

Chart of Accounts
Using Default Chart of Accounts
Account Codes and Account Types
Refining your Accounts
Adding an account to Watchlist
Add, Edit, Delete, and Archive Accounts
Tax Codes

Customised Branding
Add a Standard Branding Theme
Add a DOCX theme
Using a new branding theme in Xero

Manual Journals
Post a Manual Journal
Edit and Delete a Journal
Reverse and Auto Reverse Journals
Search Manual Journals
Import Draft Manual Journal
Repeating Journals

Find and Recode
Search transactions
Search Conditions
Recode with Manual Journal
Recode Transactions

Reconcile Bank
Handy points to know before reconciling
Automatic bank feeds
Imported statements
Bank Reconciliation
Refresh Feed
Manually Mark as Reconciled
Cash Coding

Conversion to Xero
Setting Conversion Date
Opening Account Balances
Entering historical invoices & bills

Connected
Standard Business Reporting (SBR)
Google
Online Invoicing
Business to Business
Payment Services
e-invoicing
Hubdoc

Reporting
Custom Reports
Draft Reports
Summary Reports
Published Reports
Archived Reports
Favourite Reports
Management Reports
Saving and Exporting reports
Customise Report Layouts
Lock Dates

Budget Manager
Set up an Overall Budget
Monitoring your budgets

Contacts & Data Mining
Contact Groups
Merge Contacts
Smart Lists

Fixed Assets
Start Date
Adding Asset Types
Asset List
Assets entered via Purchases
Assets prior to start date
Numbering Asset items
Tracking
Depreciation Method
Asset Options
Show History
Depreciation on Fixed Assets
Disposing of an Asset

Duration: 1 day
Class size: 6 max
Times: 9.30am to 4.00pm
Where to from here?: Xero Payroll, Xero in a Day,
Intro to Xero Projects, Intro to Hubdoc Xero