

Introduction to Xero Projects



Duration: 1 day

TARGET AUDIENCE

This one-day course is intended for people who need to know how to setup and effective use Xero Projects. Target users are small businesses that have less than 20 employees who need to manage and job cost small projects.

LEARNING OUTCOMES

The skills and knowledge covered in this course are sufficient to help you understand what is involved in setting planning, costing, and reporting project profitability.

Project Management

- Elements of a Project
- Project Management Triangle
- Project Costing

Xero Projects

- System Requirements
- Sign up and Login
- Working with Others
- Adding and Inviting Users
- Getting Help
- Project Subscription
- Project User Roles
- Project Staff Cost Rates

Preparing Your Xero file

- Organisation Settings
- Invoice Settings
- Chart of Accounts
- Products & Services
- Payroll settings & employees

Estimate & project

- Plan a project
- Create a Draft project
- Manage Estimated Tasks
- Manage Estimated Expenses

Project Quote

- Create a Project Quote
- Accept a Project Quote
- Start a Project

Project Deposit

- Create a project Deposit
- Email project deposit

Manage Project expenses

- Create a bill & assign to a project
- Create Spend Money & assign to a project
- Assign Expense Claim to a project
- Add direct project expense
- Track project expenses to Estimates
- Use inventory in projects
- Update project expenses
- Delete project expenses
- Un-assign project expense

Add Time to a Project

- Add time to a project
- Add project time to a Xero timesheet
- View Staff Time entries in projects

Project Invoicing

- Project Invoice from a project quote
- Task & Expense invoice
- Progress payment invoice
- Final Project amount invoice
- Mark project time, tasks, expenses as invoiced

Reporting

- Report Settings
- Project Detailed Time report
- View un-invoiced time entries
- Project Summary
- Project Details
- Exporting a report
- Saving a report

Close a Project

- Close a project
- Re open a project

Duration: 6 hours

Max Class size: 6

Times: 9.00am to 3.00pm

Where to from here?: Xero Payroll, Xero in a Day, Smarter Xero