

Introduction to XERO



Computer Smart Training Centre

SOFTWARE TRAINING SPECIALISTS

Learning Outcomes: When you have completed this cloud-based course, you will be able to set up and Xero from scratch, fine tune your set up, manage your contacts, manage your sales and payables and reconcile your back accounts.

Course Pre-Requisites:

Participants will be familiar with personal computers/ laptops/ tablets and possess basic typing skills. You will need to know how to launch and close programs and find stored information on the computer; and manage files and folders. Some basic bookkeeping knowledge would be beneficial. The training requires no prior knowledge of Xero.

Getting to know Xero

- Exploring different editions of Xero
- Choosing themes
- The Dashboard
- Support Options
- Management reporting and analysis capabilities

Setting up Xero from scratch

- Preparing for set up
- Collect business data
- The Set-Up Guide
- Organisation Settings
- Financial Settings
- Invoice Settings
- Users
- Chart of Accounts
- Conversion Balances
- Historical invoices, bills and credit notes
- Ways to get paid
- Bank account set up
- Credit Cards
- Online payment options
- Tax rates

Fine-tuning the Set-Up

- Understanding the dashboard
- Xero balance vs Bank balance
- Account watch list
- Money in and Money out
- Expense claims
- User access levels
- Other users' access
- Live Bank feeds
- Managing import statements
- Bank rules

Managing your Contacts

- Setting up customers
- Setting up suppliers
- Finding contacts
- Managing contacts
- Grouping contacts
- Merging contacts
- Setting up employees

Managing your Sales

- The Sales dashboard
- Money in
- Customers owing the most – list' Pie chart
- Basic Invoice functions
- Create a new sales invoice
- Saving, approving
- Sending an invoice to a customer
- Advanced invoice functions
- Clear invoices for positive cash flow
- Repeating invoices
- Invoicing contact groups
- Managing credit notes
- Sending receipts
- Recording payments
- Receipts against payments
- Email templates
- Outstanding debtors
- Statements – activity; outstanding

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Introduction to XERO

Managing Your payable

- Purchases dashboard
- Supplier bills
- New bills
- Making Payments- individual; batch
- Printing bills
- Schedule payments
- Remittance advice
- Credit notes
- Expense claims
- Authorise and pay claims

Reconciling your Bank Accounts

- Preparing to reconcile
- Automagically reconciling accounts
- Hierarchy for matching
- Tweaking transactions to reconcile
- Match misfit transactions
- Create
- Transfer
- Cash coding
- Bulk coding
- Bank statements
- Account transactions
- Spend and Receive money options
- Direct payments
- Prepayment
- Overpayment
- Underpayment
- Searching for a transaction
- Fixing error
- Unreconciling a bank transaction
- Removing and undoing a bank transaction



All WordPress classes are tax deductible.

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