

Xero Intermediate – 1 Day



Course Objectives

To take your understanding of Xero up a notch and become familiar with some of the more advanced feature used in accounting.

Prerequisites

This course assumes that you have mastered the topics covered in the introduction course.

Exercises

This course is instructor led, involving the utilisation of examples and exercises in a workshop environment.

TOPICS

Advanced Contact Management

- Setting up and using smart lists
- Other useful features

Users

- Adding a user and setting permissions
- Changing user permissions and removing users

Chart of Accounts

- Setting up the chart of accounts

Expense Claims

- Using the mobile app

Advanced Bank Reconciliation

- Overpayments and prepayments

Fixed Assets

- Recording an acquisition
- Registering fixed assets
- Depreciation
- Disposals

Advanced Reporting

- Budgets
- Advanced profit & loss reports
- The balance sheet
- Other reports

Advanced Sales Invoice Management

- Using payment services e.g.Paypal
- Automating invoice reminders

Importing Data

- Contacts
- Sales invoices
- Purchase invoices
- Bank Statements

Managing VAT in Xero

- Setting up Xero for VAT
- Checking and submitting VAT returns

Managing Payroll

- Payroll settings
- Employee setup
- Running a pay run
- Payroll Reports

Projects in Xero (If time allows)

- Setting up projects
- Recording income and expenses
- Project reporting

If our standard course outlines don't cover exactly what you are looking for please ask us about our private training which can be tailored to meet your requirements. This can be held at your site or ours.