

Xero Introduction – 1 Day



Course overview

Course Objectives

To have a good basic understanding of Xero and be able to competently use most of the important features used in accounting and bookkeeping.

Prerequisites

This course assumes little or no knowledge of Xero but assumes you have a basic understanding of using a PC and Windows, e.g. using a mouse (left and right clicks), opening, closing and saving files.

Exercises

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

Topics

Introduction

- The benefits of using Xero
- Basic functionality
- How to navigate Xero

The Dashboard

- Understand the dashboard
- Tailor it to your preferences

Sales Invoices

- Setting up sales invoices
- Customising sales invoices

Contacts (Customers & Suppliers)

- Setting up a new contact

Inventory

- Creating an Inventory item

Emailing from Xero

- Customising emails

Quotes

- Creating a quote
- Sending a quote

Sales Invoices

- Creating and sending a sales invoice

Customer Statements

- Sending statements of overdue amounts
- Sending statements of activity

Purchase Orders

- Creating purchase orders

Purchase Invoices

- Recording a purchase invoice

Bank Accounts

- Setting up a bank account and feed
- Reconciling a bank account

Reporting

- Viewing a basic profit & loss report

Xero Support

- Using the help centre
- Contacting Xero Support