

Duration: 1 day

This course follows the Xero Introduction course and teaches you how to use more functions and features of Xero.

By the end of the course, delegates will have learnt all about:

- Advanced Contact Management
- Advanced Bank Reconciliation
- Projects in Xero
- Managing VAT & Payroll
- Advanced Sales Invoice Management
- Importing Data

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 and loss reports
The balance sheet
Other reports

Advanced Sales Invoice Management

Using payment services, eg 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
Managing Payroll

Payroll settings
Employee setup
Running a pay run
Payroll reports

Projects in Xero

Setting up projects
Recording income and expenses
Project reporting