

Xero Introduction

Duration: 1 day

This course is an introduction to Xero for complete beginners. It explains the basics and teaches you all you need to know to begin using Xero.

By the end of the course, delegates will be able to:

- Navigate the Xero dashboard and customise it to your preference
- Send tailored e-mails from Xero
- Create both sales invoices and purchase orders, and reconcile your bank account
- Create and view pre-loaded reports

Topics

Introduction

The advantages of using Xero

Basic functions

How to navigate within Xero

The Dashboard

Understanding the dashboard

Customising it to your preference

Sales Invoices

Setting up sales invoices

Customising sales invoices

Creating and sending sales invoices

Contacts: customers and suppliers

Setting up new contacts

Inventory

Creating Inventory items

E-mailing from Xero

Tailoring e-mails

Quotes

Creating and sending quotes

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 simple profit and loss report

Xero Support

Using the help centre

Contacting Xero Support