Xero
Advanced

General Outline

Xero is a powerful online accounting tool for managing your business's accounts. In our Advanced course, you'll learn:

♦ how to master its functions and features.
♦ apply best-practice work-arounds and shortcuts.
♦ how to save stacks of time and have less stress.

You can bring along any specific problem areas relevant to your business or workplace.

Detailed Course Outcomes

♦ Check your Xero setup, accounts, GST, etc.

♦ Revise / revisit bank rules and automatic bank reconciliation.

♦ Enter tricky transactions; For example:
⇒ Customer prepayments and pre-sale deposits.
⇒ Combined business and private transaction.

♦ Set up simple job tracking, departmental accounting.

♦ Set up work-arounds for undeposited payments (cheques, EFTPOS, clearing, etc)

♦ Find and fix errors in reconciled transactions; For example:
⇒ unreconcile transactions.
⇒ recode to correct accounts quickly.
⇒ manually reconcile transactions.

♦ Work with documents, files and electronic record-keeping.

♦ Complete a check-list for end of financial year or end of BAS period.

♦ Set up and complete the BAS correctly, code in correctly BAS payment or refund.

♦ Manage security; For example:
⇒ Set up users and restrict access to functions.
⇒ Lock periods to prevent changes / new transactions.

♦ Customise design templates for emails and forms.

♦ Customise and publish financial reports.

♦ Other Xero functions:
⇒ Cleaning up old accounts and contacts.
⇒ Manage fixed assets & depreciation.
⇒ Work with journal entries.
⇒ Manage and report on budgets.
⇒ Export/import data.
⇒ Much more...

♦ Answer your specific questions.

CLASS TRAINING

Duration & Rate:

♦ 1 day public course OR
♦ 3 x 1-hour online OR
♦ Closed / Onsite (inquire)

Prerequisites:

Previous experience with using Xero is recommended.

Public Course Includes:*

♦ Use of a computer for hands-on exercises.
♦ Extensive training manual.
♦ Refreshments.
♦ Certificate of attendance.
♦ After-course support.
♦ Free refresher course.

Inquire re details.

How to Book:

♦ Phone us on **(02) 6041 2711.**
♦ Email us at **office@classtraining.com.au**.
♦ Book online at **www.classtraining.com.au**

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