



Xero

Essentials & Beyond

Course Content

General Outline

Xero helps you manage your business accounts and 'paperwork' with very little fuss. It is a 'cloud' application, which means you use it and access your data file through the Internet.

In our course you will learn how easy it is to use Xero to reconcile your bank statement with automatic, live feeds from your bank. Xero will even recognise those transactions on your bank feed and enter the payment or deposit, and reconcile it at the same time.

As well as saving lots of time reconciling, you'll learn how to create sales invoices, receive online payments automatically, design your invoices, enter bills and more.

Master tricky GST transactions as well as private/business transactions with percentage breakdowns for proper tax reporting. Basic reports and how it all works 'in the cloud' with security and backing up (which you don't need worry about) are covered as well.

Also, bring along your specific questions/queries about how Xero will work for your business or place of work.

Detailed Course Outcomes

- ◆ Get used to and navigate Xero's screen (Dashboard, Accounts, Contacts, etc).
- ◆ Set up and check basic settings:
 - Bank & credit card accounts
 - Chart of accounts
 - Bank feeds
- ◆ Create sales invoices and enter sales payments.
- ◆ Enter supplier bills and payments.
- ◆ Use 'templates' to save time entering invoices and bills.
- ◆ Create credit notes, refunds and voids transactions.
- ◆ Use shortcuts and repeating transaction features.
- ◆ Reconcile bank accounts with live feeds and automatic transactions.
- ◆ Use time-saving 'cash coding' to quickly reconcile accounts.
- ◆ Create simple and complex bank rules to save time.
- ◆ Print/download reports (P&L, Balance Sheet, etc).
- ◆ State mobile apps and other 'add-ons' for using and extending Xero for your business.
- ◆ State 'where to go' to enter transactions specific for your business or workplace.



Delivery, Duration & Rate

- ◆ 1 day public course, OR
3 x 1-hour online OR
Closed / Onsite (inquire)
- ◆ For rates and dates, visit:
[classtraining.com.au/
coursedates/44-xero-essentials-
beyond](http://classtraining.com.au/coursedates/44-xero-essentials-beyond)

Prerequisites

No experience in Xero is required. Attendees should be familiar with using a Windows PC and browsing the Internet.

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.

Dates + Bookings

- ◆ Phone us on **(02) 6041 2711**
- ◆ Email us at:
office@classtraining.com.au
- ◆ View dates and book online at:
[classtraining.com.au/
coursedates/](http://classtraining.com.au/coursedates/)