



# Xero Advanced

# Course Content

## General Outline

Xero is a powerful online accounting tool for managing your business's accounts, and our Advanced course will show you how powerful it really is. You'll learn:

- ◆ how to use to bank rules for split-coding transactions.
- ◆ how to use transaction 'templates' to save stacks of time.
- ◆ much more that you can use for your accounts.

**You can bring along any specific problems.**  
*There's plenty of time for one-on-one assistance.*

## Detailed Course Outcomes

- ◆ Check your **Xero setup** (accounts, items, cash-drawer, etc)
- ◆ Enter **tricky transactions**:
  - Customer prepayments and pre-sale deposits.
  - Combined business and private transactions.
- ◆ 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:
  - unreconcile transactions.
  - recode to correct accounts quickly.
  - manually reconcile transactions.
- ◆ Reconcile **different types** of transactions:
  - overpayments
  - underpayments
  - invoices paid twice
  - many more.
- ◆ Use bank rules for:
  - **split transactions.**
  - **3rd-party clearing transactions.**
- ◆ Work with documents, files and **electronic record-keeping.**
- ◆ Complete check-list for **EOFY** or end of BAS period.
- ◆ Set up and complete the **BAS** correctly, enter BAS payment or refund correctly.
- ◆ Manage **security**:
  - 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:
  - Clean up old accounts and contacts.
  - Manage fixed assets & depreciation.
  - Work with journal entries.
  - Manage and report your budgets.
  - Export/import data.
  - Much more...
- ◆ **Solve your problems.**



## Delivery & Duration

- ◆ 1 day public course, **OR**  
1 x 3-hour online session **OR**  
Closed / Onsite (inquire)
- ◆ For rates and dates, visit:  
[classtraining.com.au/  
coursedates/43-xero-  
advanced/](http://classtraining.com.au/coursedates/43-xero-advanced/)

## Prerequisites

No experience with **Xero** is assumed nor required.

## Public Course Includes\*

- ◆ Computer for hands-on skills.
- ◆ Extensive training manual.
- ◆ Refreshments.
- ◆ Certificate of attendance.
- ◆ After-course support.
- ◆ Free refresher course.

\* Inquire re details.

## Online Sessions Include

- ◆ PDF workbook of instructions.
- ◆ Interactivity: ask your questions.
- ◆ Access to recording of session.
- ◆ After-course support.

## How to Book

- ◆ Phone: **(02) 6041 2711**
- ◆ Email:  
**office@classtraining.com.au**
- ◆ Book online:  
[classtraining.com.au/  
coursedates/43-xero-  
advanced/](http://classtraining.com.au/coursedates/43-xero-advanced/)

