



# Xero

## Essentials & Beyond

# Course Content

### General Outline

Xero helps you manage your business accounts and 'paperwork' with very little fuss. You'll learn how easy it is to use Xero to reconcile your bank accounts 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 use some great shortcuts to create sales invoices, enter and pay bills automatically, enter cash transactions and more.

**Also, bring along your specific questions/queries about how Xero will work for your business or place of work. There's plenty of time for some one-on-one assistance.**

### Detailed Course Outcomes

- ◆ Get used to and navigate **Xero's screen** (Dashboard, Accounts, Contacts, etc).
- ◆ Set up, check and create **important settings**:
  - Bank & credit card accounts.
  - Chart of accounts.
  - Items.
  - Bank feeds.
  - Cash drawer / petty cash accounts.
- ◆ Create **customer invoices** and enter **sales payments**.
- ◆ Enter **supplier bills** and **payments**.
- ◆ Use **electronic record-keeping** to file away bills etc.
- ◆ Use **time-saving shortcuts** to quickly enter transactions.
- ◆ **Void** transactions and create **credit notes** and refunds.
- ◆ 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, BAS, 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

- ◆ 1 day public course, **OR** 1 x 3-hour online session **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 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](mailto:office@classtraining.com.au)
- ◆ Book online: [classtraining.com.au/coursedates/44-xero-essentials-beyond/](http://classtraining.com.au/coursedates/44-xero-essentials-beyond/)

