



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 save time with transaction 'templates'.
- ◆ How to fix errors, reverse transactions, clean out old accounts and contacts, do your BAS and reports, etc.
- ◆ 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

- ◆ Set up important Xero areas: **cash drawer** account, **stock and service items** to sell, etc.
- ◆ Set up simple **job tracking, departmental accounting**.
- ◆ Create **transaction 'templates'** for common sales invoices and supplier bills.
- ◆ Create and manage **refunds correctly**.
- ◆ Create and use **undeposited payments** accounts to track and **reconcile EFTPOS/cheque payments better**.
- ◆ **Manually reconcile** bank transactions and when and why to do that.
- ◆ Reconcile **tricky transactions**:
 - prepayments, overpayments, underpayments, etc.
 - invoices paid twice.
 - payments made with fees deducted, etc.
- ◆ **Adjust, correct and reverse** wrong transactions.
- ◆ 'Clean out' **duplicate accounts and contacts**.
- ◆ Work with documents, files and **advanced 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.
- ◆ **Customise, publish and output** financial reports.
- ◆ **Export reports to MS Excel** for analysis, charting, etc.
- ◆ **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/

Prerequisites

CLASS Training **Xero Essentials & Beyond** course or experience with Xero is recommended.

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/

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