

## COURSE OUTLINE

### LEARNING OUTCOMES

By the end of this course participants will be able to:

- \* use Xero navigation techniques
- \* complete the first stage of the Xero setup process
- \* create and edit customer and supplier details
- \* enter sales
- \* create invoices
- \* receive and apply customer payments
- \* reconcile Xero
- \* create and modify reports
- \* understand how Xero tracks GST

### PREREQUISITES

It is recommended that participants have basic experience with the underlying operating system, i.e. an ability to navigate the environment using a mouse and keyboard plus an understanding of computer file storage.

### CUSTOMISATION

In addition to our standard courseware, we can adapt course content and flow to your specifications.

Navigate Xero's screen (Dashboard, Accounts, Contacts, etc).

Set up and check basic settings:

- ✓ Bank and credit card accounts
- ✓ Chart of accounts
- ✓ Watch-list accounts
- ✓ Bank feeds

Create sales invoices and enter sales payments.

Enter supplier bills and payments.

Save time by creating batch payments to suppliers automatically.

Manage and track GST.

Use shortcuts and repeating transaction features.

Reconcile bank accounts and enter transactions automatically with live feeds and auto-transactions.

Create 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.