

Xero Training Workshop Guide



Southampton

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London

90 Long Acre
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Bills (Expenses):

Bills work the same way as Sales Invoices, but the opposite.

Cash receipts are entered the same way as an ordinary bill, and then paid to 'Owner Funds Introduced' from the Bill screen.

Notes:

Contacts:

Contacts can be accessed from the main Navigation.
Once entered on the Bank Reconciliation, a Contact will be created.
Once created, you can edit the Contact.
Sales Invoices sent to a Contact will auto-fill with their information.

Notes:



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Chart of Accounts:

The chart of accounts is the codes, or categories used. These can be added or amended by selecting the Chart of Accounts from the 'Settings' tab from the main navigation.

Notes:

How to chase money owed:

You can see a snapshot of money owed from the Dashboard. Clicking on the information in this snapshot will then bring you to the Sales page. From here, you can Send Statements to customers to chase money owed. Alternatively, you can select 'Reports' and then 'Aged Receivables' from the main navigation.

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How to see who you owe money to:

This is visible from the Dashboard.

Notes:

Reporting:

This is the best part of Xero.

One of the main flaws in year end accounts, any accountant will tell you, is that they are old. You can't make sound business decisions based on outdated information.

You can access all of the reports from the main navigation.

Notes:





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VAT:

Access the VAT Return by clicking 'Reports' and then 'VAT Return'.

This can be filed through Xero. It can also be used to budget for VAT due throughout each quarter.

Notes:

Xero Support:

Support direct from Xero can be accessed from <https://help.xero.com/uk>

Notes:



we are...
diverSo
accountants but different