



Xero Training Modules

Half-Day Training:

Xero Introduction	Moving to the cloud and Xero Plans & Pricing.
User Roles	An overview of user roles and when to permit those different roles.
Banking	How to add bank accounts and how to set up bank feeds.
Dashboard	What the Dashboard is, how to edit it and a look at the Business Performance Dashboard.
Bank Reconciliation Basics	How to use the basic methods of reconciling bank transactions and how to reconcile using the Xero Touch app.
Sales	The sales dashboard, creating and sending invoices and how to set up invoice reminders.
Purchases	The purchases dashboard, creating bills and creating purchase orders.
Reporting	How to find and use Xero's key reports, including GST returns.

Full-Day Training:

All half-day training modules, plus the following:

Bank Reconciliation Advanced	How to process part payments & paying/receiving amounts in advance.
Fixing Coding Errors	How to fix coding errors by using the remove and redo function.
Tracking	How to set up to tracking, why it's important and how to filter your reports using tracking.
Contacts & Smart Lists	The contacts dashboard, how to add a new contact and how to create a new Smart List.
Files	What the files library is, where to find it and the different ways to import documents into the library.
Inventory	How to import and add new inventory and how to use tracked inventory.
Expense Claims	How to enter and manage expense claims using the new Xero Expense Claims, including adding and removing expenses, showing different sections for permissions and explaining receipt processing.

See next page for other module options



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Other Modules:

Fixed Assets	Setting up a fixed asset register, recording new assets, running depreciation and how to maintain the fixed asset register.
Projects	Who Projects is best suited for. General overview of what projects can track. Also a look into allocated expenses, bills, time and also invoicing from Projects.
Payroll Introduction	An overview of Xero Payroll.