

Introduction to Xero

Course information

Course Content (½ day)

Xero explained

- What is Xero?
- Xero subscriptions
- Xero Add-ons

Finding your way around Xero

- Log on to Xero
- Open an organisation file
- The Dashboard
- Toolbar, Menus & Tabs
- The Getting Started Panel
- Open multiple screens
- Xero help centre

Xero Settings

- Organisation settings
- Financial settings
- User settings
- Chart of accounts
- Tracking categories
- Tax rates
- Email settings

Contacts

- Types of contacts
- Contact groups
- Smart Lists
- Archive contacts

Inventory

- Inventory tracking settings
- Add inventory items
- Use inventory items in transactions