XERO INTRODUCTION TRAINING + SUPPORT

Small business accounting has now been made easy. Xero is a Cloud based system that will revolutionise the way you manage your accounting. Bring yourself or your key staff members along to this full day training session and get excited about your bookkeeping!
Your trainer is a certified Xero Advisor and CPA who has personal experience in running a small business and knows first-hand how Xero can be best utilised to suit your situation.

NO PREVIOUS ACCOUNTING EXPERIENCE NECESSARY

Gone are the days when you need a 3 year undergraduate degree to even have a conversation about a Profit and Loss Statement! Xero has developed its Cloud based accounting system so that it's:
✓ Easy to use
✓ Easy to understand
✓ Backed up on the Cloud

TOPIC COVERED

- Learn how to take advantage of being on the Cloud and it's capabilities
- Set up Xero from scratch (with the help of your trainer)
- Prepare, generate, email invoices quickly (incl. repeat invoices, credit notes, receipts)
- Smoothly manage your Accounts Payable/Receivables
- Reconcile bank accounts - resolving mismatches, cash coding, over/under payments etc
- Manage all payables - creating bills, batch payments, cancellations, remittances etc.
- Set up banking rules & bank info (money in/out) that can be customised to your needs
- Manage your staff, contacts and customers details
- View of all your bookkeeping through your Dashboard
- And take away a Certificate of Completion at the conclusion of your training.

TRAINING DAYS - WEEKDAYS & SATURDAYS AVAILABLE

We believe that a great way to learn is in person, and that's why we provide a face-to-face interactive workshop. Our Xero Training Program is conducted either at our CBD training facility or for larger teams we can come to your business. In addition to weekday training sessions we offer a limited number of Saturday sessions.

2 MONTHS OF EMAIL SUPPORT

Target Accounting sets itself apart from other Xero training organisation by providing an ongoing email support service for 2 months after the completion of your training course. This is a great opportunity to get help when you are first starting to use your newly acquired skills.

COST OF PROGRAM

$350+GST per person

REFRESHER COURSE

The cost of your course entitles you to re-attend the Xero Introduction Program within 12 months and receive 50% off the full price. Subject to availability.

SPECIAL OFFER

Bring a full-fee paying friend to your Refresher Course and receive a further $50 off.

SAFELY TRANSFER FILES OVER TO XERO

Your Chart of Accounts, Bills, Journals and other Sales records in your previous systems can be converted over to Xero. And we can help you do that. If you have QuickBooks, Sage or MYOB systems please call us to safely and securely transfer your previous data files over to Xero.

To book or more information contact Target Accounting Service

info@targetaccounting.com.au

DETAILED COURSE OUTLINE

1. INTRODUCTION

Understanding Xero
Understanding Login, access and pricing
Managing your Xero account setting
Access Xero the demo company
Helpful tips
Accessing help and support
Understanding Xero Notifications
Understanding Dashboard

2. XERO GENERAL SETTING

Understanding organisation settings
Understanding financials settings
Understanding Tax Rates

3. XERO FEATURE SETTINGS

Understanding invoice settings
Creating branding theme
Adding payment services
Understanding email settings
Creating an email template
Creating file library
Creating transaction from files

4. CHART OF ACCOUNT

Understanding the chart of accounts
Understanding how account affect the reports
Using Xero default chart of accounts
Importing a chart of accounts
Customising chart of accounts

5. USERS

Understanding different user roles
Adding a user
Removing a user
Inviting Xero support

6. CONTACT

Understanding contact
Adding customers
Adding suppliers
Importing contact
Finding your contacts
Managing your contacts
Grouping your contacts
Archiving outdated contacts
Merging your contacts

7. BANK ACCOUNTS

Managing bank account menu
Understanding bank accounts & bank feeds
Adding bank accounts
Adding credit cards
Understanding the hierarchy for matching
Changing dashboard bank account order
Bank statements and importing

8. BANK RECONCILIATION

Understanding reconciliation
The reconciliation screen
Viewing bank Statements
Viewing account transactions
Creating spend money transactions
Creating receive money transactions
Transferring funds between bank accounts
Auto matching
Understanding create, transfer and discuss
Direct payment
Prepayment
Overpayment
Underpayment/part payment

Understanding bank rules
Creating bank rules
Editing bank rules
Managing bank rules
Reconciliation report

9. SALES

Understanding sales dashboard
Pie chart
Understanding invoice input field
Creating a new sales invoice
Adding attachment to an invoice
Saving, sending and cancelling invoices
Sending an invoice to a customer
Creating a repeating invoice
Searching invoices
Understanding credit note
Creating credit note
Recording payments
Following up on aged debtors
Creating and sending statement

10.PURCHASE

Understanding purchase dashboard
Understanding bill input field
Managing suppliers bills
Creating a new bill
Adding attachment to bill
Saving, approving and voiding a bill
Making a payment
Making batch payments
Scheduling payments
Sending remittance advice
Bank files
Understanding repeating bills
Creating a repeating bill
Managing credit notes

11.REPORT

Understanding commonly used reports
Understanding report layout
Customising report layout
Adding summary, foot note
Saving, exporting and publishing reports
Understanding activity statement