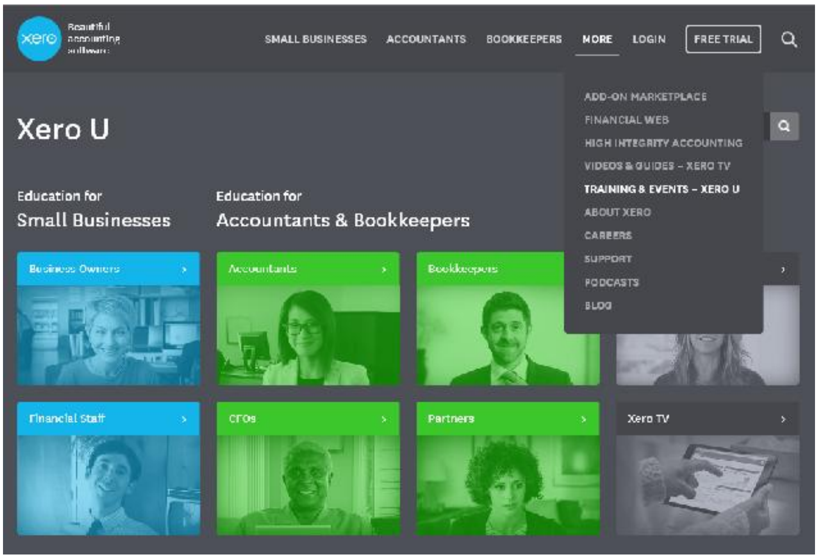
# Xero How to Use, Tips & Tricks – Clients

Here are some general tips to help you get around Xero as quickly and as easily as possible.

| | |
|---|---|
| **Quick Xero login** | To speed up logging into Xero by only having to enter a password, replace the upper case characters with your Xero login address, then save as a browser or desktop bookmark. Type the below into your web browser.<br>https://login.xero.com/?username=REPLACE_WITH_YOUR_USERNAME |
| **View multiple pages** | View multiple pages of your organisation in Xero at the same time by using tabbed browsing (as long as you're using one of our supported browsers and aren't viewing multiple organisations at once).<br><br>There are three main ways to open a link in a new tab:<br><br>1. Hold down Ctrl + Left Click on the link<br>2. Right-click on a link and select Open a new Tab<br>3. Ctrl + T to open a new tab |
| **Xero desktop shortcut** | To add a shortcut to the Xero login page to your desktop, go to the Xero login page in your browser and drag the small round Xero icon in the URL or web address bar at the top of the browser out onto your desk top. Now you can click on the browser icon on your desktop to go directly to the Xero login page rather than opening your browser and typing go.xero.com or using a bookmark you may have saved. |
| **Search for contacts when entering transactions** | Use Xero's advanced contact search when you're entering transactions. Simply enter at least 3 key letters of your contact's name. For example, if you want to find one of your taxi contacts, enter 'taxi' and all your contacts containing taxi in their name appear. You can also search for the primary contact person for your contact's organisation. |
| **My Xero organisation order** | The way you order your organisations in My Xero will be remembered each time you go back there – click on the Name or Last viewed column in My Xero to sort by last viewed date (if there's one organisation you use most often) or by organisation name (if you have lots and need to scan the list). The My Xero drop-down menu will always show the last 5 organisations you logged into in reverse chronological order. Access My Xero from the header by clicking the list icon and selecting My Xero. |

**Notes…**

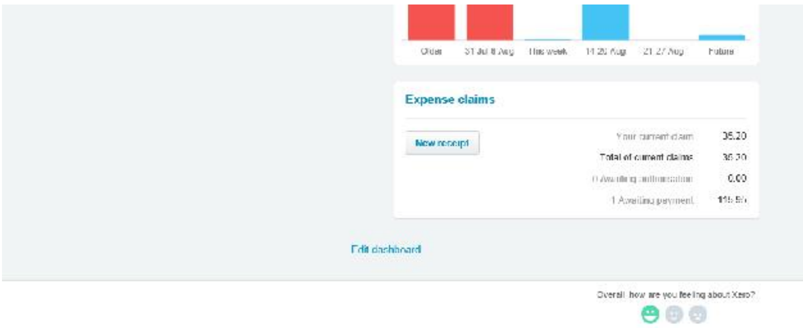
## Training & Help




Xero provides a great help database and traiaing. If you go to Xero.com/traiaing you can view a lots of Videos & helpful guides on how to do things. One to look at is "Getting ready for year end"

## Dashboard

You can customise you dashboard when you first login to be how you like it. When you customise it, it is specific to you only. To do this go to the bootom of your screen and click "edit dashboard". Don't forget to click "Done" when finished.



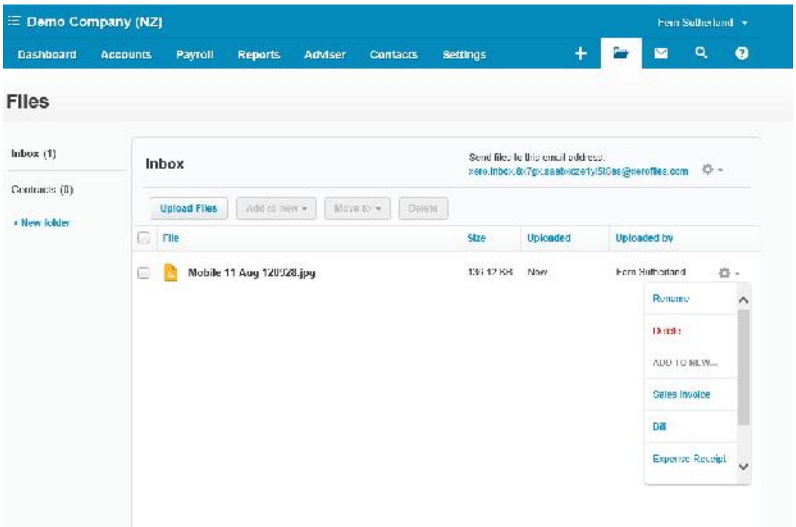

## 2 Step Authentication

I higly recommend this is set up as it provides an extra level of security. Instructions on how to do this are on the Xero website. I have also included a printout with this booklet.

## Xero Touch App

This is a great way to be able to do things on your smartphone rather than having to logon to your computer all the time. It does look very different to the pc version but still a great way to do basic things.

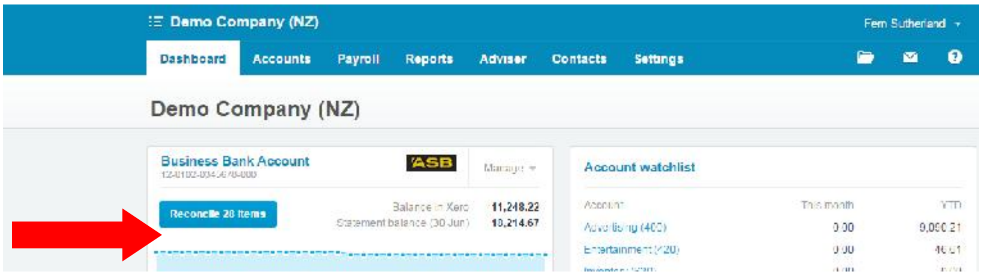
## Files




These is increasignly becoming another way to store information. You can email all sorts of files into xero and the specific email addres is located below. You can also take photos and upload direct from your computer. Once you have done this there are a number of ways to use this informatin. Store it in folders or store it behind an invoce you may enter fom this screen.

**Notes…**

## Bank Reconciliation




## How does Xero help you reconcile your account?

**Xero will follow certain steps, in a particular order, to try to match your bank statement lines with your account transactions. You can choose whether to:**

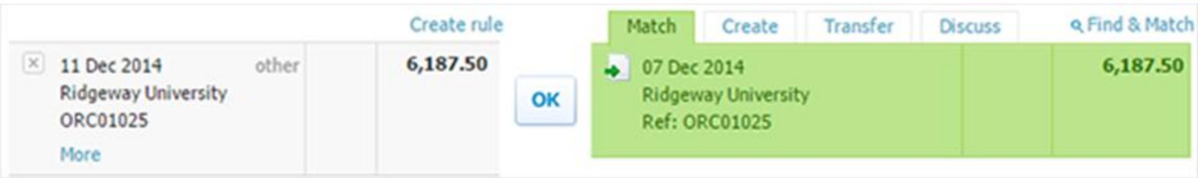
- Accept the match Xero suggests
- Change the match and reconcile
- Choose from other possible matches found
- Create your own transaction in Xero to match to the bank transaction

Xero will follow these steps:

### Auto-match

Xero automatically matches your imported statement lines with the transactions you've entered in Xero as purchases or sales. You can choose whether to accept the match or not.

### Match



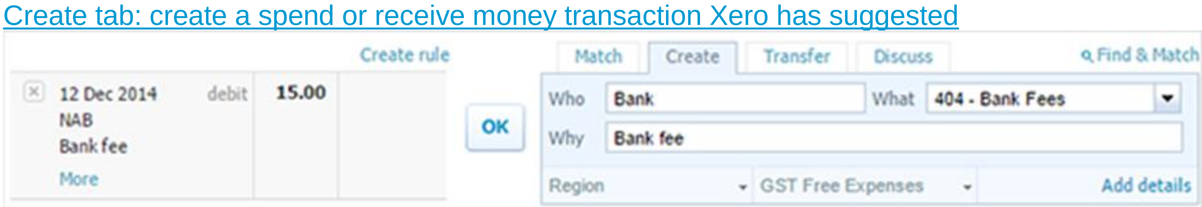

### Bank rule

If you have created bank rules, Xero will apply bank rules first for a transaction.

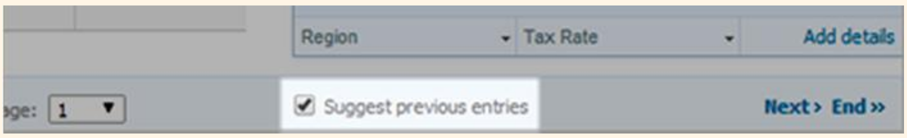

### Auto-suggest

If there is no auto-match or bank rule to apply, and you have enabled auto-suggest, Xero will suggest a match based on a previously-reconciled transaction with similar details.

[Create tab: create a spend or receive money transaction Xero has suggested]



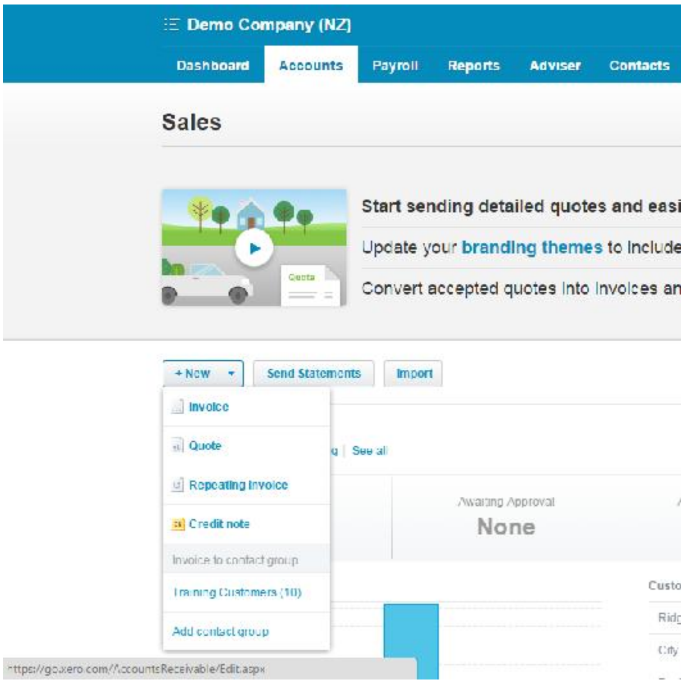

To enable auto-suggest, check the **Suggest previous entries** check box at the bottom of the bank reconciliation screen. This will turn on matching suggestions for this account for all users in your organisation.

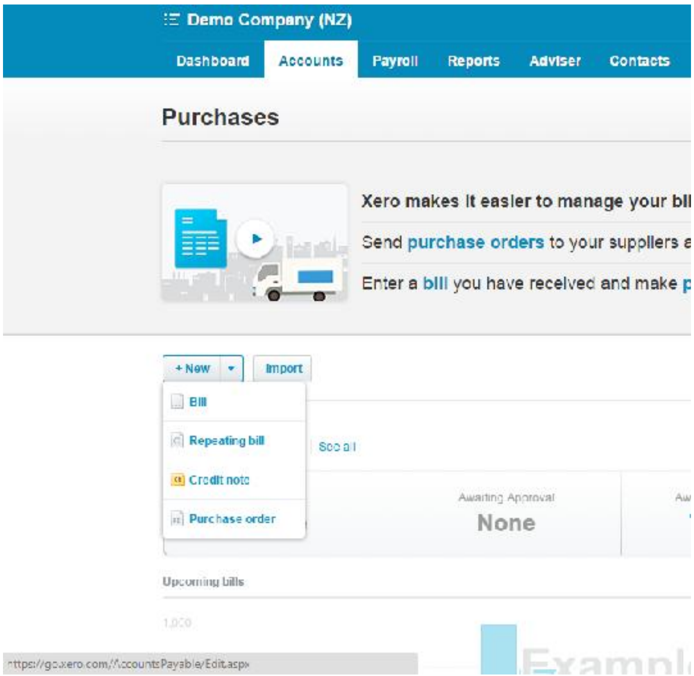


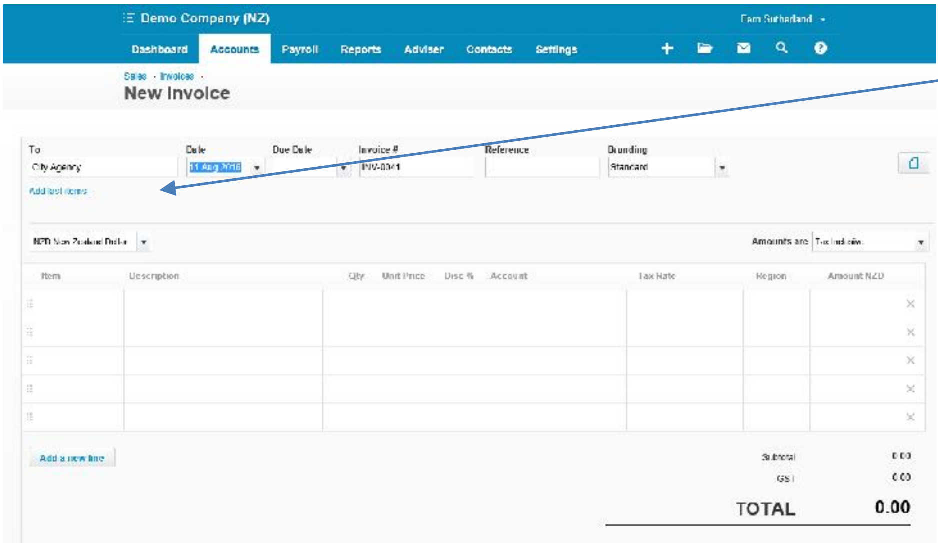

If Xero cannot find a match using one of these 3 methods, you can create your own match.

**Notes…**

# Sales & Purchases




Add last items – This will bring through the details from the last invoice you entered for that client.

These two areas look and feel very much the same, enter the person you are sending an invoice to (Sales), or receiving an invoice from (Purchases).

Enter the date of the invoice and the due date, if you tab across this area, todays date is automatically entered.

For sales & Quotes, Xero autimatcally enteres the next Invoice Number.

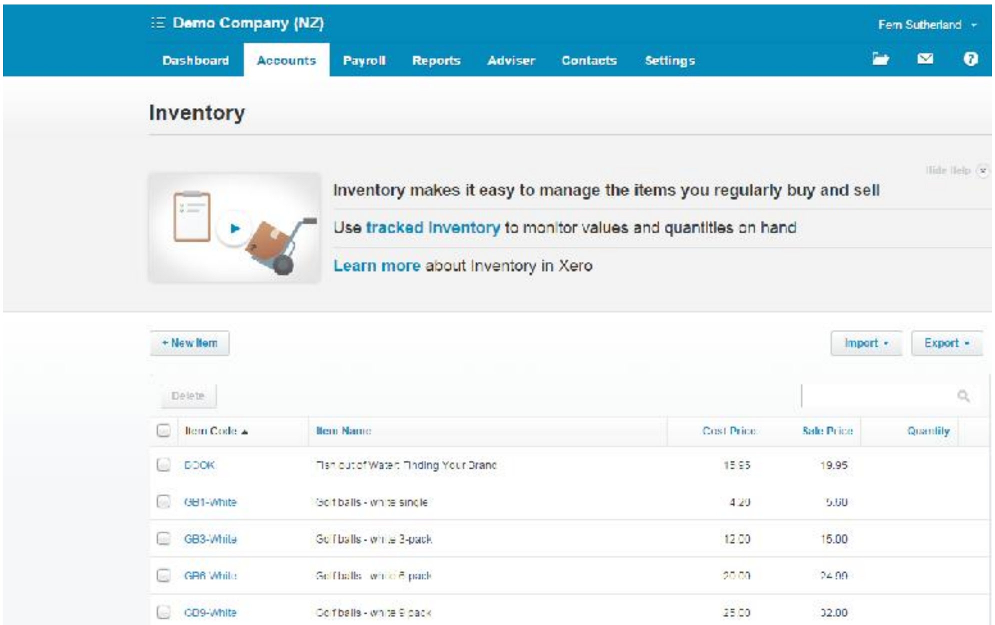
Reference is where you would put order numbers.

Branding is only used/turned on if you would like to report on departments, this is the same for currency.  If you are only operating within NZ this option is not there.

Items, also referred to as inventory is explained on on the next page, and can help with data entry of sales.

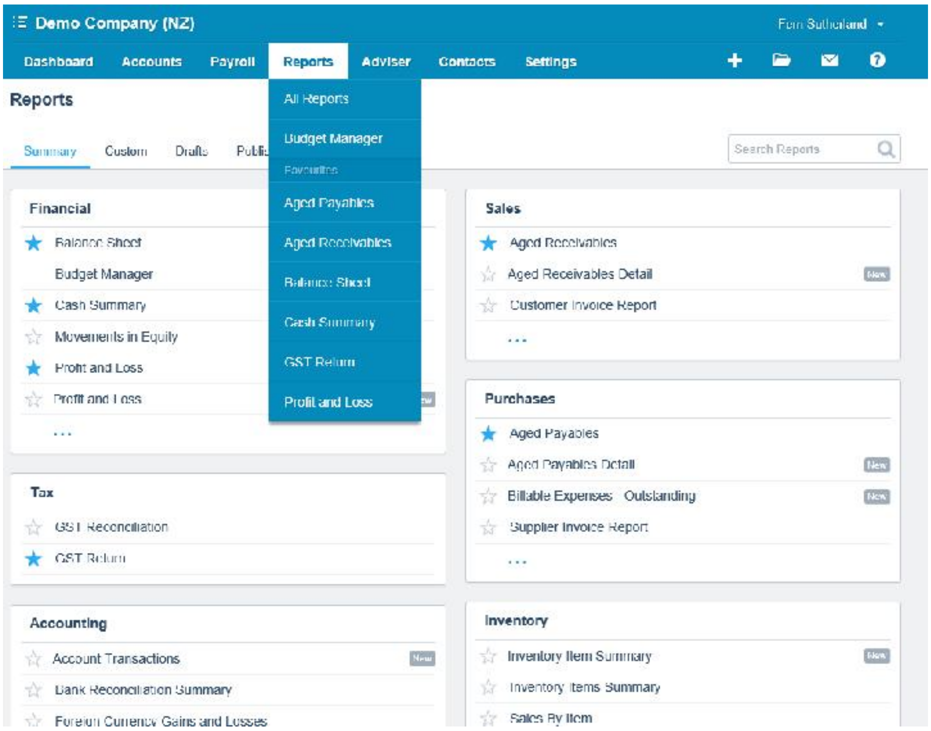
**Notes…**

# Inventory




Inventory (or items) is a great way to help speed up the way you enter your sales. By selecting an inventory item it can pre-populate your narration fields, as well as your GST,Code & Amount fields.  This can all be changed and is not set in concrete.

# Reports



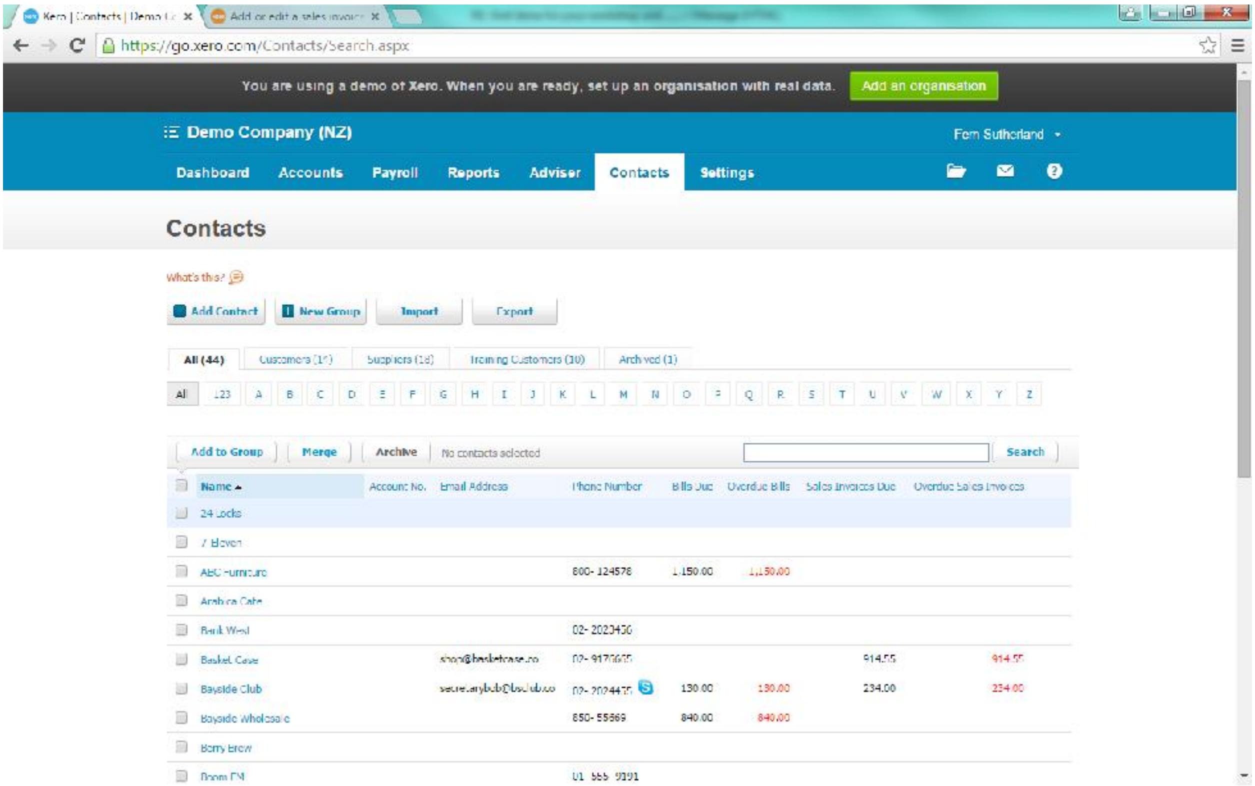

There are a large number of reports available, and by putting a star next to the ones you use often, these then show up in the favourites list, which is a quicker, easier way of accessing the reports you use often.

You can also find your GST Return in this menu, and once you are happy with your return, please make sure you finalise the return when you are filing this will also then enable you to file the GST return straight to the IRD.  This helps with end of year preparation and if you go back and edit entries.

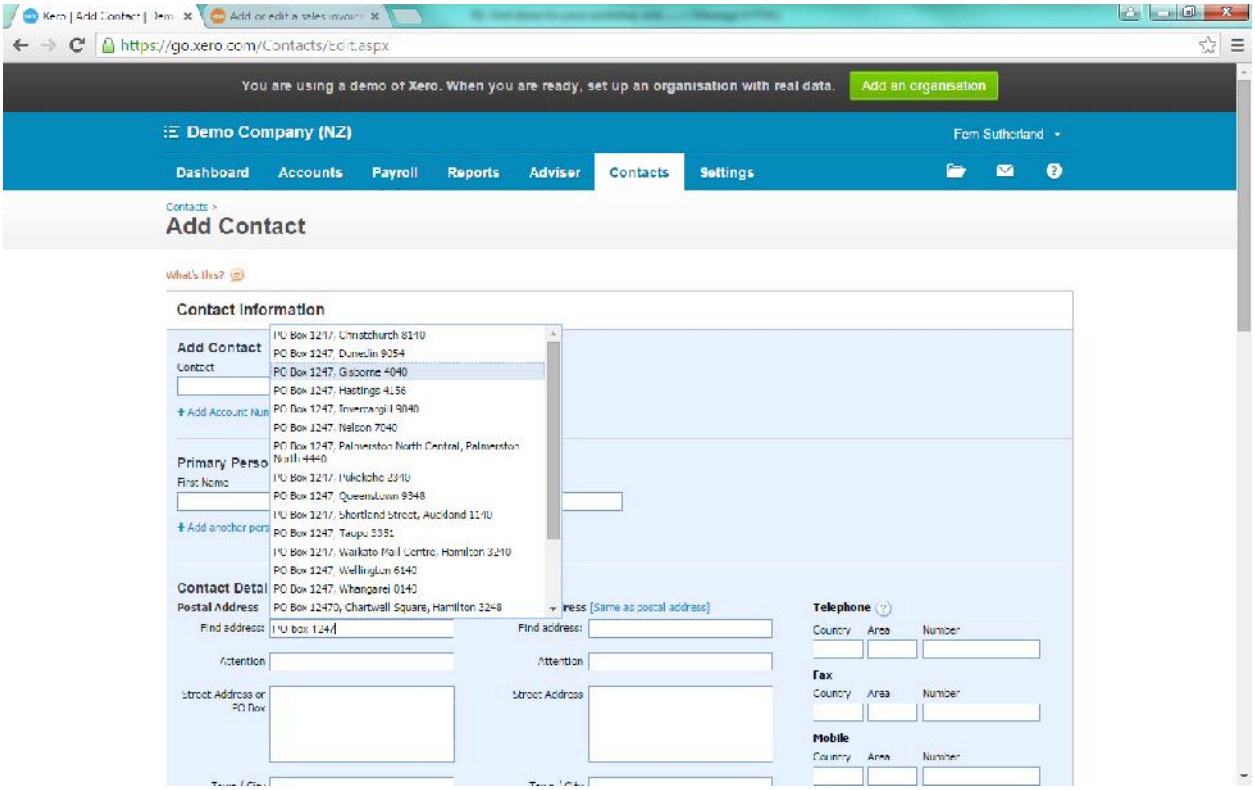
To access reports easier you can bookmark favourtie ones, and you can now customise these reports easier.

## Notes…

# Contacts

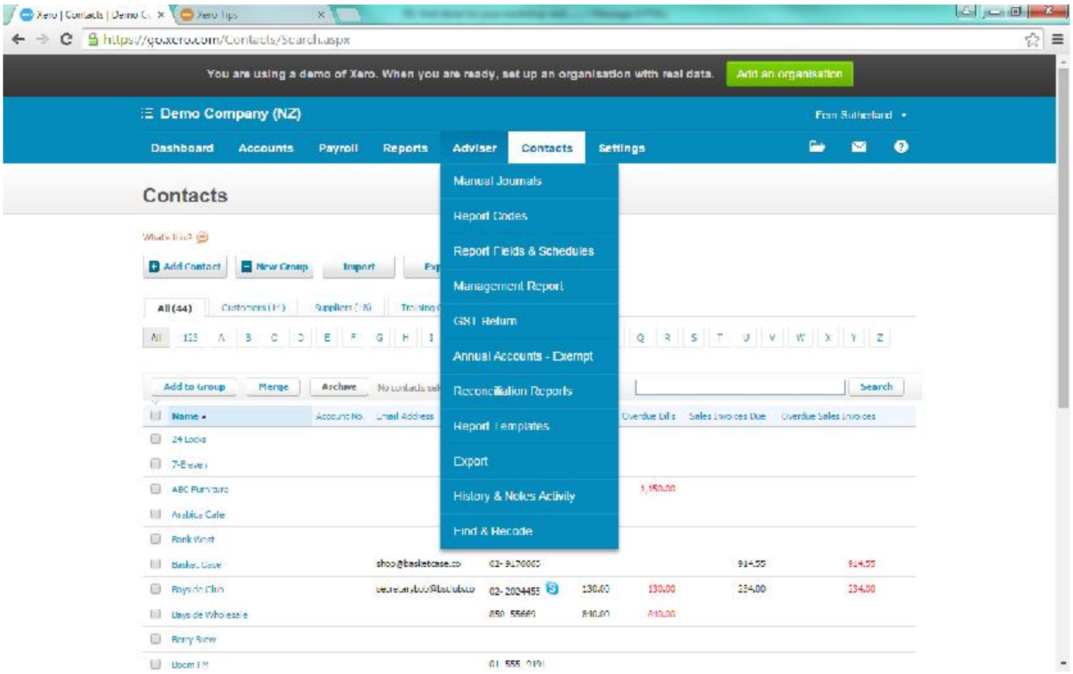


This is where all of your suppliers' and customers' data is kept, and can be used as a database. Xero works with google maps and can help you search for an address and populate all fields including the post code correctly for you.



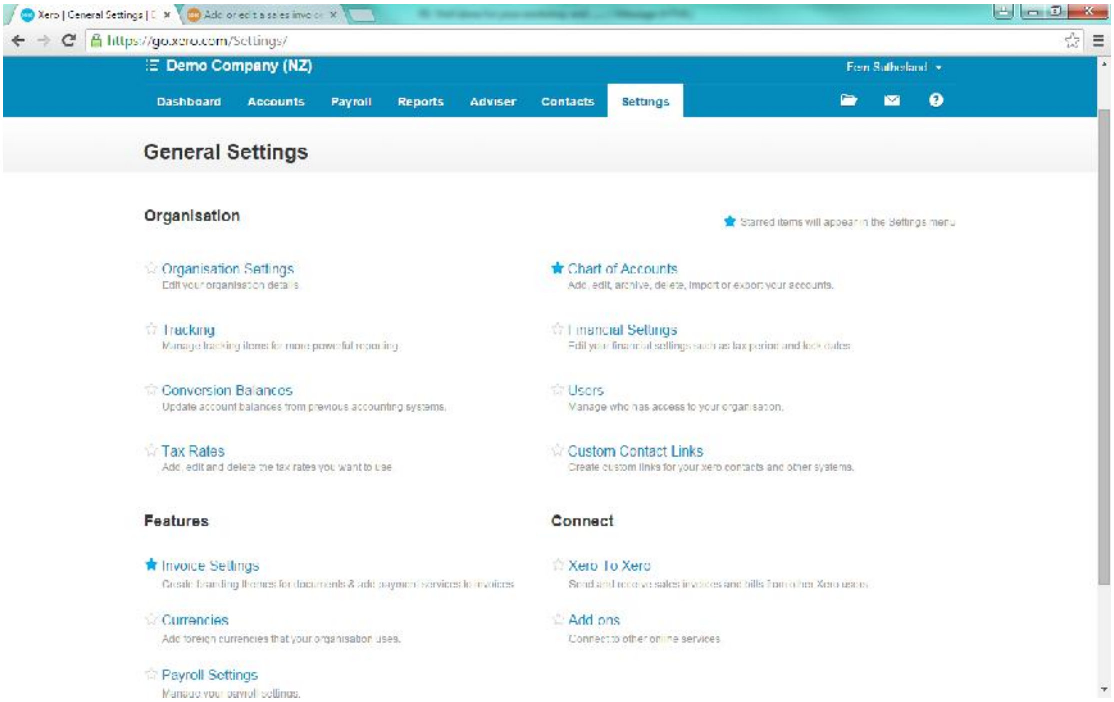
## Notes…

# Adviser Tab




This Adviser tab is only available for those that are set as financial advisers, and from this tab you enter manual journals.

# Settings




Unless you know what you are doing, I do not recommend going into this tab.

But in saying that this is where you will need to customise your invoice and add codes to your chart of accounts. The stars work the same way as the reports area so you can add these 2 areas to the drop down list for easy access.

## Notes…