XERO COURSE OUTLINE

OVERVIEW

Our 6 Week Xero Training is designed to build your confidence and capability in Xero, helping you feel comfortable with the system while understanding all its functionality.

The training runs over six 60–75 minute sessions and is delivered by Gustav Bessinger – chartered accountant and finance coach. You'll work through examples in real time, applying what you learn as you go. By the end, you'll have a solid grasp of Xero's key features – from day-to-day admin to more advanced tasks.

DATES

Sessions will be held on Mondays at 12PM on the following dates:

- 13th April
- 20th April
- 4th May
- 11th May
- 18th May
- 25th May

*No session 27th April (ANZAC Day)

DETAILS

Location: Business Mastery Offices, 94 Coleridge Street, Sydenham
Please bring: Your Laptop!
We will provide:

- Water, Tea + Coffee
- Pens for note-taking
- Session printouts with space for annotations
- A manual for each session, for future reference
- A certificate of completion at the end of the training

SESSION OUTLINES

Week 1
a. Introduction to Xero - What it is and what it can do
b. Core Tasks - Focus on key basic functions including:

- Quotes
- Invoices & Purchase Orders
- Bills (Supplier Invoices)
- Batch Payments
- Bank Reconciliation

BUSINESS MASTERY

SESSION OUTLINES CONTINUED

Week 2
a. Expense Claims - Submitting and managing expenses in Xero
b. GST - Recording and reporting GST correctly
c. Cash Sales - Handling cash transactions efficiently
d. Bank Rules - Automating bank coding to save time
e. Xero Files - Uploading and managing documents in Xero
f. Xero to Xero & E-Invoicing - Link Xero organisations + send invoices electronically
g. JAX - Overview and usage

Week 3
a. Partial Payments - Coding partial payments from customers or to suppliers
b. Overpayments - Handling overpayments from customers or to suppliers
c. Refunds - Coding refunds to customers or from suppliers
d. Deposits - Recording deposits received from customers or paid to suppliers
e. Minor Differences - Managing small discrepancies on customer receipts or supplier payments
f. Aged Receivables - Reviewing outstanding customer balances

Week 4
a. Bank Feeds - Setting up and managing bank feeds
b. Importing Statements - Uploading bank statements into Xero
c. Common Errors - Identifying and resolving frequent issues
d. Remove & Redo - Correcting mistakes efficiently
e. Bank Reconciliations - Including:
- Using Bank Statement vs Account Transaction tabs
- Finding coding errors with the bank reconciliation report
- Auto-reconcile for faster processing

Week 5
a. Chart of accounts -What it is, its purpose, and how to add accounts in Xero
b. Find & Recode - How to correct or reallocate multiple transactions in bulk
c. Tracking - Using tracking to measure performance of different business segments
d. Online Payments - Managing & processing payments through Xero
e. Reporting - Generating and understanding key reports

Week 6
a. Fixed Assets - Track business assets & automate depreciation, including profit/loss on asset sales
b. Contacts - Recommended minimum information and proper setup
c. Inventory - Managing stock in Xero
d. Projects - Tracking project costs and performance
e. Forex - Handling foreign currency transactions