



- There are three subscription levels, make sure you are on the best one for your business.
- Add the Xero App to your smart phone and record expenses as they happen, no more missed claims through lost receipts
- To speed up log-in, replace upper case characters with your Xero log-in address then save as a bookmark
- Did you know you can open multiple pages in your Xero organisation by using tabs
- Xero has a inbuilt calculator to help when inputting invoices, details here: <https://help.xero.com/uk/InbuiltCalculator>
- Change the settings to personalise the email that goes out with your invoices, your business, your voice.
- Add payment services to your invoices and get paid faster, reducing credit control and improving your cashflow
- Turn on Invoice Reminders to reduce time spent on credit control and improve your cash flow
- Want to write to all your customers? Export their details from Xero then use the mail merge function in Microsoft Word
- Create Bank Rules for those regular payments and receipts to speed up the reconciliation process.
- When you receive bills forward them straight to your Xero File ready for your bookkeeper, ask us how.



- Do you invoice the same customers the same amount on a regular basis? Set up repeating invoices, a great time saver.
- Did you know you can set up more than one invoice template, great news if you use factoring for some of your customers.
- Track your sales item by item using the Inventory Feature.
- Need to share reports? You can export any report to Microsoft Excel. Or Google Docs for sharing
- Use the payment reference field for Cheque Numbers to help with bank reconciliation.
- Need to keep a close eye on an expense category? Add to the account watch list and see it on the dashboard.
- Set up Automatic Bank Feeds - your bank data will be imported to Xero automatically ready to be reconciled.
- Raise your quotes in Xero, then when accepted convert them to an invoice - a great time saver.
- Use the Asset Register to record all your assets and run the depreciation schedule monthly for your P&L
- Collaborate with your bookkeeper and accountant by adding them as advisors to your Xero.
- Make use of the date short cuts to speed up data entry - <https://help.xero.com/uk/DateShortcuts>
- There are lots of Apps that integrate with Xero - Check to see if any will be useful for your business.

