



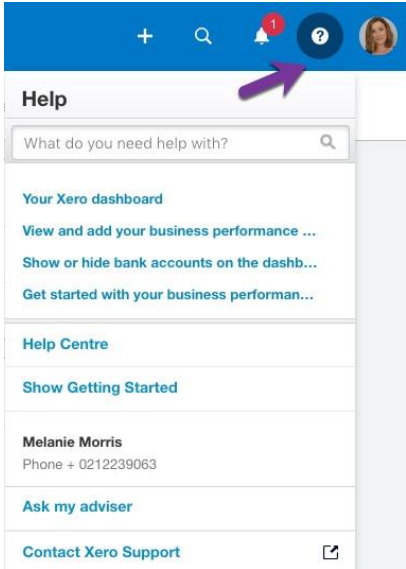

Module One - Xero Training

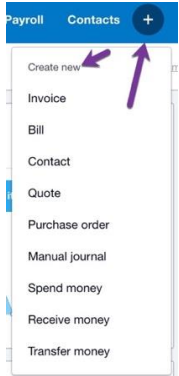
Getting Started Let's Begin

Login to Xero, you can either use your existing Xero organisation or the demo company. If you do not have a Xero log in, please set up a free trial or ask us for help, we sometimes have special deals on subscriptions as well.

If you would like to switch over to Xero, please email info@trainingandbeyond.co.nz to request an online copy of our conversion form.

Tips and Tricks

<p>Multiple Tabs</p> <p>Hold Ctrl & Left Click (PC) Hold Command & Click (Mac) Left Click > Drag Link Right Click > select New Tab/Window</p>	<p>There is no limit to the amount of tabs/windows you can have open at one time, however you can only have Xero Organisation open in one browser. If you would like another Xero Organisation open, for example you may wish to be working with intercompany transactions, use either a new incognito window or another browser and log in as usual. The only trick with multiple tabs and windows is to refresh the tab or window when moving around, to capture the changes.</p>
<p>Get Help</p> 	<p>The question mark in Xero is a fantastic way of searching for further information. You can search directly for a topic or select one of the options below.</p> <p>Help Centre - this will redirect you to Xero Central. Xero Central is a search engine for all things Xero where knowledge articles are available to explain different areas of Xero. Xero Central is also the place where you can raise a case with an Xero specialist.</p> <p>Get Help for this page - this link will take you straight to the areas in Xero Central that are relevant to the page you are currently on.</p> <p>Hide Getting Started - throughout Xero you will see that there are banners with Getting started notes and videos. If you wanted to turn these off this would be the place to do that.</p> <p>Find an advisor – redirects you to search for an accountant or bookkeeper. If you have an advisor, their details are found here.</p> <p>Contact Xero Support – opens a new tab to allow you to create a case with Xero support.</p>
<p>Global Search</p> 	<p>Global Search is your best friend, you can search for contacts, bank transactions, invoices, bills and \$ amounts all in one spot. (note this is not active in the demo company).</p>

<p>Change Organisation</p>	<p>When changing to another organisation, just start typing once clicked on name at top left no need to click into change organisation as well. <i>Tip : save those mouse clicks</i></p>
<p>Quick Add +</p> 	<p>Use the + symbol to create new:</p> <ul style="list-style-type: none"> • Invoice • Bill • Contact • Quote • Purchase order • Manual journal • Spend money • Receive money • Transfer money

EMAIL SETTINGS

Organisation settings >

Email settings

Tailor the emails you send from Xero

See our [help article](#) to learn how to control the display name and reply address

Tailor the emails sent from this organisation

Email address Emails are sent using the name **Training and Beyond Admin** with replies going to info@trainingandbeyond.co.nz

[Edit](#)

Templates You have 6 standard templates and 10 custom templates

[Edit](#)

Organisation Name > Settings > Features (heading) > Email Settings

Email Settings

Allows you to change the reply to email address and from name on emails you send to your contacts.

Tip : great for keeping email communications centralised

Templates

Allows you to customise the default narration in emails sent from your Xero organisation. You can also add new templates.



Training Exercise 4 : Email template

Please add a new email template to your Statement template, with the wording:

A gentle reminder that your account is now due.

Please find attached your statement [Statement Date Range]

We do our best to deliver a great service to you and would really appreciate your prompt payment or feedback if you believe your account is not correct.

The full module is 16 pages, plus an answer sheet.

On successful completion of the module, you will receive confirmation of your answers and a certificate of completion.

