



Xero Setup & Conversion

Course Duration: 3 hours

This course is designed for financial professionals (accountants/bookkeepers) that wish to perform an initial setup of Xero for new businesses, or convert clients into Xero from other accounting software or manual spreadsheets.

Course Syllabus

UNIT 1: Xero Setup <ul style="list-style-type: none">• Setup Organization Settings• Setup Financial Settings• Setup users• Understand Chart of Accounts• Edit GST codes• Add/Delete Accounts• Export/Import Chart of Accounts• Setup Bank Accounts• Setup Credit Cards• Setup Paypal• Connect Bank Feeds• Understand contacts• Setup Invoicing• Setup Logo, Branding• Understand tracking• Understand Multi Currency• Create Email templates• Send Xero to Xero• Understand Adds on• Understand Expense Claims	UNIT 2: Xero Conversion <ul style="list-style-type: none">• Understand Conversion Balances• Setting Conversion Date• Entering Conversion Balances• Payroll opening balances• Entering Comparative Balances
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All our training courses are offered online via Zoom, or in person at our training centre in Helensvale

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