



Xero Bank Reconciliation, Purchases & Invoicing

Course Duration: 2 hours

This course will take you through in more detail how to set up bank accounts and run bank reconciliation. We will also take you through Accounts Payable/Purchases.

Course Syllabus

UNIT 1: Bank Accounts

- Add Bank accounts
- Setup Bank feeds
- Add Credit card
- Setup Credit card feeds
- Add Paypal
- Setup Paypal feeds
- Manually Import Bank Statements
- Create transactions
- Matching
- Part Payments
- Minor Adjustment
- Over/Prepayments
- Transfer between bank accounts
- Auto fill
- Discuss
- Bank Rules
- Searching transactions
- Bank Reconciliation
- Reconciliation Report

UNIT 2: Purchases

- Creating a New Bill
- Attaching file to Bill
- Edit/Copy/Void Bills
- Searching Bills
- Creating Repeating Bills
- Creating Batch Payments
- Creating a credit note
- Applying a credit note

UNIT 3: Invoicing

- Understand invoice Settings
- Adding Payment Service
- Invoice layout and template
- Upload Logo and Branding
- Create an invoice
- Sending Receipts
- Searching invoices
- Batch deposit
- Statements
- Creating Purchase Orders
- Invoicing from Purchase Orders

All our training courses are offered online via Zoom, or in person at our training centre in Helensvale

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