



NN ACCOUNTABILITY
BOOKKEEPING & TRAINING GROUP

Xero Setup & Conversion

DURATION

3 hours

LEVEL

Advanced

DELIVERY

Online or in person

WHO IT IS FOR

Accountants and bookkeepers

This course is designed for financial professionals who need to perform an initial setup of Xero for a new business, or convert an existing client into Xero from other accounting software or manual spreadsheets. You will finish able to configure an organisation correctly from the ground up and bring across accurate opening balances.

Course Syllabus

UNIT 1

Xero Setup

- Set up organisation settings
- Set up financial settings
- Set up users
- Understand the chart of accounts
- Edit GST codes
- Add and delete accounts
- Export and import the chart of accounts
- Set up bank accounts
- Set up credit cards
- Set up PayPal
- Connect bank feeds
- Understand contacts
- Set up invoicing
- Set up logo and branding
- Understand tracking
- Understand multi-currency
- Create email templates
- Send Xero to Xero
- Understand add-ons
- Understand expense claims

UNIT 2

Xero Conversion

- Understand conversion balances
- Set the conversion date
- Enter conversion balances
- Payroll opening balances
- Enter comparative balances

Ready to book?

Delivered online via Zoom anywhere in Australia, or in person at our Xero Training Centre on the Gold Coast. Online sessions are recorded and the recording is yours to keep.

Book This Course