



Training Guide

Xero Training for Beginner users

District Office - kanohi ki te kanohi

Training Aim

The aim of Xero training for beginners is to identify how financial information is applied within the setup of Xero accounting software, enabling internal managerial decision making for whanau.

Please Bring

Laptop and any policy that may concern you for processing your financial data into Xero accounting software.

Content

- All things Bank – Signatories, online banking, and bank feeds
- Getting started with Xero in main dashboard screen
- Understanding the Dashboard and layout
- How to access Xero help and support
- Confirming the settings
- Basic overview of bank reconciliation
- Attaching files to transactions for audit
- Bills & Purchases
- Invoices & Receipts
- Basic overview of reporting
- How to add an user/advisor
- Q&A

Time: 10.00am – 2.00pm

Date: Check website for your local district office dates.

Venue: Check website for your local district office address.

Details required to register.

Kohanga name and ID, District office association, person full name to be trained, MB, Email, district office manager associated with.

*Ko te manu e kai ana i te miro, nōna te ngahere.
Ko te manu e kai ana i te mātauranga, nōnā te ao.*

The bird that consumes the miro berry owns the forest
The bird that consumes knowledge owns the world.