

# Advanced Xero Training

Comprehensive Cloud  
Based Accounting  
Solution for SMEs

One and a Half Day  
Training Course



## Course Outline

Xero accounting is a world leading and fast growing cloud based accounting solution, making the task of bookkeeping easier to manage and maintain. With your accounts securely stored on a Xero cloud server on the internet, the flexibility in accessing and updating records is made easy whether using a computer or mobile device.

Xero is a straight forward and logical bookkeeping software that is cost-effective for any type of business. With importing features made available, it is easy to switch to Xero from other accounting solutions. Designed to be user friendly, Xero is a powerful assistant for businesses to manage finances and related tasks efficiently and conveniently.

Our one and a half day training course comprehensively covers the complete concepts and features available in Xero, with a fully hands on and exercise filled session, leaving participants equipped with the knowledge to effectively manage finances using the advanced features of the software.

The training course lasts one and a half day, with the first day starting at 9.00am until 5.30pm, and the second day starting at 9.00am until 12.30pm, and is inclusive of course materials, certificate and complimentary four week post course support and assistance. A wi-fi enabled laptop (not iPad or tablet) is required for this course along with a basic understanding of ICT and the internet.

## Course Benefits

Following this course, you will learn:

- How to comprehensively use Xero as your primary accounting solution
- What makes Xero a powerful accounting and bookkeeping software for any business
- The advanced tools and features made available in Xero and how to use them
- How to import data from your current preferred software
- How to deal with problems and complications

## Who Should Attend

- Accountants
- Financial Controllers
- Business Owners
- Entrepreneurs
- Self Employed Businesses



# Course Programme

## The Fundamentals of Xero

- Advantages of using Xero
- Feature list and overview of Xero
- Comparison with other solutions

## Complete Setup of Your Xero Account

- Creating your account
- Settings and features of your account
- Inserting essential details
- Tax codes and GST
- Opening balances
- Setting up bank details in Xero
- Creating a custom dashboard

## Contacts Management

- Contacts creation
- Editing and amending contacts

## Inventory Management

- Creation of Products/Services inventory
- Inventory adjustment
- Inventory tracking

## Credit notes, invoices and quotations

- Customising reports with Word
- Customising emails

## Managing sales, purchases and transactions

## Managing Fixed Assets

## Bills payment

## Applying credit notes to invoices

## Receiving payments by cash and cheque

## Scanning receipts and paper documents

## Reconciliation of Bank Accounts

- Cash coding and bank rules

## Reports Generation

- Payable reports
- Customising reports
- Custom fields and parameters
- Printing reports
- Merging and moving reports
- Creating management reports

## Developing budget management

## Working with multi-currency

## Case Studies and example scenarios

## Resolving problematic data

## Resolving common accounting issues

## Popular extensions and integrations

## Exporting from Xero



# Registration Form

**CHARLESMANN  
ACADEMY**

**ADVANCED XERO TRAINING** Comprehensive Cloud Based Accounting Solution for SMEs

**COURSE FEES: \$500.00 per delegate (One and a Half Day Training)**

**DAY 1:**

**9.00am:**  
Arrival and Introduction

**10.30am - 10.45am:**  
Morning Tea Break

**12.30pm - 1.30pm:**  
Lunch Break

**3.00pm - 3.15pm:**  
Afternoon Tea Break

**9.15am - 10.30am:**  
Fundamentals of Xero

**10.45am - 12.30pm:**  
Features List and Overview of  
Xero

**1.30pm - 3.00pm:**  
Setting up and Maintaining  
Your Account

**3.15pm - 5.30pm:**  
Customising and Tailoring

**DAY 2:**

**9.00am:**  
Managing Contacts,  
Inventory and Sales

**10.30am - 10.45am:**  
Morning Tea Break

**9.15am - 10.30am:**  
Transactions Management

**10.45am - 12.30pm:**  
Integrations and Advanced Features

<b>DATE:</b>	
<b>COMPANY / ORGANISATION:</b>	
<b>FULL ADDRESS:</b>	
<b>AUTHORISED BY / JOB TITLE:</b>	
<b>CONTACT NUMBER:</b>	
<b>EMAIL ADDRESS:</b>	
<b>WEBSITE:</b>	
<b>COURSE DATE REQUIRED:</b>	

	<b>FULL NAME</b>	<b>JOB TITLE</b>	<b>EMAIL</b>
<b>ATTENDEE 1:</b>			
<b>ATTENDEE 2:</b>			

If registering 3 or more attendees, please contact us for bulk discounts or to arrange in-house training. Course dates can be found on our website along with venues. Dates and/or venues can change due to unforeseen circumstances.

Please print and email this form to: [info@charlesmann.com.sg](mailto:info@charlesmann.com.sg)

Alternatively, please post to: Grandlink Square, 511 Guillemard Road, #B1-03 Singapore 399849

On receiving this form, we will email you a pro-forma invoice. Payment can be made direct into our DBS bank account:

OCBC Bank, Account No. 6894 8672 8001

Charles Mann Academy Pte Ltd

\* Dates and/or venues can change due to unforeseen circumstances.