

XERO FOR SMALL BUSINESS

free webinar on Xero cloud Accounting

Reasons to consider moving to Xero

- Automated daily bank feeds
- Fast, simple and customised invoicing
- Available anytime, anywhere you are online
- Real-time collaboration with you advisors
- Safe and secure
- Smart reports with links to source transactions
- Dashboard to give clear financial overview
- No installation or IT maintenance required
- Full featured payroll

Things to consider before switching to Xero

- Does your business require add-on functionality not currently available in Xero directly?
- If so, which app is best for your business to integrate with Xero?
- Are you books up to date for a clean cutover?
- Are you wanting to bring across only the balances from your old system or all transactions?
- If all transactions, from which date?
- What access level is relevant for different roles within your organisation?

contact us



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head on over to page 2 for more info...

Additional information about Xero

Xero Mobile App

- Reconcile your bank transactions anytime
- Capture expenses on the go and invoice while you're still on the job
- Take your customer contact details with you
- You can give your employees access to Xero time sheets and leave requests on mobile

Accessibility & Collaboration

- Business owners should spend the majority of their time increasing revenue, not getting frustrated and being uncertain of their financials.
- Online accounting systems like Xero allow you to access your accounting records from anywhere at anytime. All you need is Internet access.
- Company staff, BAS Agents and Accountants can all access your information in real time.
- Financial decisions and discussions happen sooner because information is shared faster due to the ease of accessibility.

Data Security

- Xero's servers are kept under around-the-clock physical security plus have multiple layers of firewalls, plus intrusion protection systems and routers guard any external access.
- Being in the cloud means your data is not being stored locally on your own computers. So if your laptop is lost, stolen or corrupted, you won't lose your data because it is stored online, and backed up in several locations.
- Automatic backups - you don't have to worry about your computer crashing or taking manual backups as Xero saves your work after every entry.

Handy Tips within Xero

- Easy dashboard access. When you log into Xero, you immediately go to your dashboard where your bank and credit card accounts are listed. Under each account is a blue tab that tells you to reconcile x number of bank transactions. With this reminder, you are more likely to reconcile a few transactions daily instead of copious transactions at month end.
- Matching transactions. If transactions can't be matched, Xero offers its best recommendations which you can choose the correct one from.
- "Discuss" tab. On the bank reconciliation screen in Xero, there is a "Discuss" tab for all downloaded bank transactions. If you aren't sure how to classify something, type a question here and save it. You can then alert your accountant or bookkeeper, and he can tell you how it should be classified. It's easier to do it right the first time instead of fixing later.