



Learning Xero

Jon Jenkins

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Key Features

- Explore the process of setting up and using Xero
- Concise step-by-step instructions to teach you best practice bookkeeping
- Discover performance enhancing add-ons to reduce your daily work

Book Description

The book begins by tackling the initial set up of Xero to ensure optimum configuration for success. From there, the next logical step is to set up the automated bank feeds, which is the best innovation in bookkeeping in years. Now that your bank data is ready for importing, we will tackle the most common transactional items, being sales invoices and purchase bills. Despite these being largely transactional, we will work through ways to automate the process where possible, save time, and avoid potential human errors along the way. Then we will start checking reports and analyze what is working or not and make changes to workflows and setups. The end result is that you will have a fully configured system ready to use and years of experience offering best practice solutions to what have been, for years, unnecessary roadblocks in your business.

What you will learn

- Configure Xero from scratch and fine-tune it ready for use
- Set up bank feeds and automate the bank reconciliation process
- Create workflows and segregation of duties for sales and purchases
- Run payrolls, giving employees the ability to request time off and generate their own payslips
- Produce reports to gain a better understanding of your business data and make better quality decisions
- Import and export data ready for analysis
- Use the power of a mobile device to run your business from the palm of your hand
- Manage your inventory with fully automated transaction processing

About the Author

Jon Jenkins graduated from Oxford Brookes University, Oxford, United Kingdom, in 2007 with a bachelor of science degree in applied accounting. He has been a certified chartered accountant since 2006 at the age of just 25. Jon began working in 1999 with Allied Leisure PLC and quickly rose up the career ladder using passion and drive to improve processes, procedures, and systems. Seeing the difference small incremental changes could make to businesses, each subsequent job has been all about improving processes, procedures, and systems, and it is these experiences that have culminated in him writing this book. In 2011, he founded a company called Smart Accountancy Systems focused on client care and a wider range of services using cloud accounting software. Jon holds regular seminars for businesses wanting to explore or discover the possibilities of how the cloud can increase productivity, profitability, and provide better job satisfaction. He is also the cofounder and CEO of Hindsight, a new software development and Xero add-on, which enables advisors to get even better business insight into client affairs so they can raise their service level yet another notch.

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