

Top tips for Xero users

April 2017

In this month's issue of top tips we remind you of the uses of Xero Files. We also take a look at the App Receipt bank.



Xero Files is a super easy way to store all your files and transactions online in one place for any time access. The Xero Files is found by clicking on the folder icon on the main toolbar.

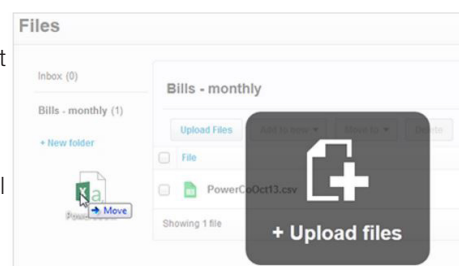
Add a file

Adding a file to Xero is easy and can be done in a few different ways:

Upload files from your computer - locate the file you have saved to your computer and drag it into the Files screen or click **Upload files**, then browse and attach your files.

Email files to the Inbox – send an email to your unique Xero email address (found in the top right hand corner of the Files screen). Once the email is received the attached documents will automatically appear in the Inbox. This even works when attaching multiple documents to the email, they will be uploaded as separate files in Xero.

Take a photo – when using the mobile app it is possible to take a photo of a document and upload this to your Inbox.



Send files to this email address:

xero.inbox.jd9n5.yndjcowzdnsxcda@xerofiles.com



Add a folder

Your Xero file library contains an Inbox and Contract's folder, and any other folders that you add.

To add a new folder, in the files screen, click on '+ New folder' on the left hand side of the screen, New folder will then appear and the name can be changed.

This is really useful for saving all sorts of documents like insurance certificates, loan agreements, signed contracts, yearend accounts or information relating to your yearend, which can then be accessed at any time, from anywhere.

Move a file to another folder

There are two ways of moving files around:

Select the tick box next to the file name, click Move to, and then select the folder you want to move it to.


Or simply drag the file into a folder.

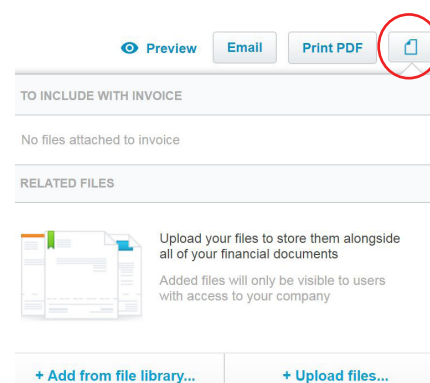
Attaching files to transactions

Top tip - Once a file has been saved in a folder, it will stay there even if it is also attached to a transaction. If a file hasn't been saved to a folder, there will not be a copy in Xero files.

Once the files are in the Inbox there are two ways of attaching a file to a transaction:

Attach a file to an existing transaction - such as an invoice or bill. To do this click on the file icon that can be found at the top of the transaction and choose '+Add from file library'. Files can be added this way whilst posting the transaction for the first time, or once the transaction has been posted.

 Create a new transaction – When in Files, click on the ' ' on the line of the document and a list of options will appear. If you click on any option under 'ADD TO NEW...' this will automatically set up that type of transaction, with the document attached. If you choose sales invoice, bill or expense claim receipt you will see the new transaction side-by-side the document on your screen, helpful if you need details from the attachment.

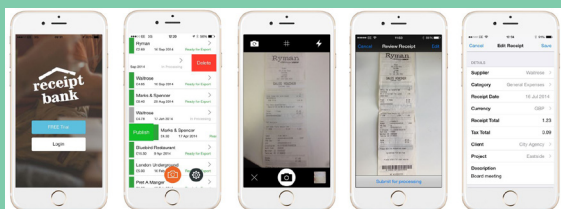


App review

By syncing your Xero account with Receipt bank you can save valuable hours by reducing your data entry time, minimising errors and eliminating piles of paperwork.

Receipt bank achieves all this by extracting data from your invoices and receipts, publishing direct to Xero with a copy of your actual invoice attached and then storing all your data for 7 years. HMRC accepts scanned copies of receipts and invoices so there is no need to waste time and money filing and storing them. Processed documents can be accessed via the archive which can be filtered or quickly searched if you ever need to find something. Copies will also be attached to transactions in Xero which means they are accessible at all times.

Their handy app allows you to take photos of your invoices and receipts whilst you are out and about and submit them for processing. Once processed, these can be published to Xero as a bill, a credit note, a spend money or receive money or bundled into an expense claim for repayment. Receipt bank also has simplified keeping track of expenses with their fully customisable expense reports.



Most importantly, the more you use it the more it learns and automates so your efficiency just keeps improving.

If you would like to know more or want us to set up an account for you please email xero@krestonreeves.com for more information.



Coming soon...

- iOS update – editing contacts and creating quotes
- Copying bank rules
- Add multiple addresses to contacts

Need more info?

Contact us at xero@krestonreeves.com or visit our online accounting page at <http://www.krestonreeves.com/services/online-accounting>.

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