

Top tips for Xero user

July 2017

With the summer holidays fast approaching we thought it would be an ideal time to share some tips on how to use Xero quickly and we remind you about some of the great features available in the Xero app, allowing you to use Xero on-the-go.

- Increase the amount of information you can see on your screen: by clicking on the cross at the top right corner and hiding the Getting Started panels.



The Xero Dashboard is an instant health check for your business

Check out our [short video](#) to quickly see how it works

See our [help article](#) to learn more



- Don't waste time moving between pages when viewing transaction lists, you can expand the number of transactions shown on one page by scrolling to the bottom of the screen and change the number shown from 25 to 200 per page.

Showing	25	▼	items per page
	10		
	25		
	50		
	100		
	200		


- Get the most out of your Dashboard - this is the first screen you will see when you log into Xero so make it work for you. You can rearrange the order of the tiles so the most important information is shown at the top of the screen and you can also add accounts to the Account watchlist - allowing you to keep an eye on your expenses. For more information on this, see our [March 2017 issue](#).

Business Bank Account

99-04-04-987654321

[Reconcile 27 items](#)

Balance in Xero 5,605.54
Statement balance (3 Jul) 17,071.99



11 Jun 18 Jun 25 Jun 2 Jul

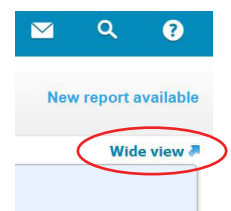
Account watchlist

Account	This month	YTD
Advertising & Marketing (400)	0.00	8,711.46
Entertainment-100% business (420)	0.00	44.66
Inventory (630)	0.00	0.00
Sales (200)	186.67	24,950.45

Business Savings Account

2 Draft Invoices 1,100.00

- Remember to use the 'Wide view' option. When viewing some reports, especially the VAT audit report, you might have to scroll across the screen to see all the information. In the top right corner of the screen click Wide View to see a larger proportion of the report.



- A top tip that we have mentioned a few times now – remember to use multiple tabs when looking into transactions. Right click on a link and chose 'Open in new tab' will allow you to easily follow transactions without having to re-load every page.
- If you are looking for a particular amount or description in a large report, remember to use the Ctrl+f function, this will bring a search bar in the top right corner of the screen to search for anything on the page.



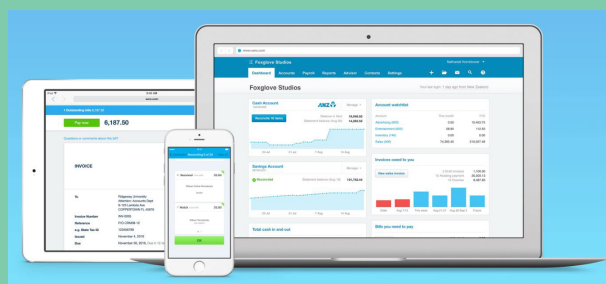
- Xero has added its own shortcut in for your use. The + icon on the toolbar will quickly allow you to open a new invoice, bill, quote and many more tools.

App review

Want to access Xero whenever and wherever? Download the free Xero app onto your phone or tablet and you can use Xero on the go.

There are loads of great features available to use through the Xero app:

- Photographing and uploading receipts for expense claims or spend money transactions
- Creating and sending invoices
- Reconciling bank accounts
- Viewing bank balances
- Accessing customer contact details
- Receive notifications
- Manage files



Coming soon

- Cash flow graph for the dashboard (iOS)
- Spotlight search for contacts (iOS)

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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