



e-News

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Xero Tips & Tricks



This week's newsletter is a little bit different!

I thought I'd share some tips and tricks I use when wrangling Xero. I hope you find some of them useful.

- *Inbuilt Calculator* - when inside an invoice or bill, and you are entering figures in a numeric field, you can enter a calculation and press tab or enter and Xero will calculate the result. For example, entering 3+7 and then "Enter" will display as the number 10 in the field.

- *Due Dates* - Following on from the above tip, when creating a sales invoice or a bill use the + button in the due date box followed by a number to calculate dates in the future. For example, if the terms are 30 days from the date of the bill enter +30 into the due date box and Xero will calculate the date.
- *Keyboard Shortcuts* - To go to bills, invoices, contacts, and other sections quickly, enter the forward slash (/) to open the global search field. Then enter b for bills, or c for contacts, or i for invoices etc. Xero will provide you with a quick link to go to all bills, or all invoices etc.
- *Navigating Reports* - To quickly get to the bottom of a page, use the End key. To return to the top of the page, use the Home key. If you have a Mac keyboard without the Home and End keys, use Command and the Up and Down arrows instead.
- *Accounts Watchlist* - Keep a closer eye on accounts that matter to you e.g. super to pay, by adding them to your dashboard. Do this by going to the Chart of Accounts, opening the relevant account, and selecting "Add to Dashboard Watchlist".
- *Accounts Watchlist View* - This list is organised alphabetically in Xero but that may not be what you want to see. If you want to see a particular account on the top of the list, simply add an asterisk (*) to the front of the name of the account, and voila, it will move to the top.
- *Find and Recode* - If you own your Xero file or have advisor access, you will have access to Xero's Find and Recode function. You can find this at the bottom of the "Accounting" tab. This function allows you to make changes to transactions in bulk - a great time saver!
- *Rectify Wages & Super Transactions Quickly* - Use Find & Recode to quickly identify transactions that have been allocated to Wages and Superannuation expense accounts in error. *Payroll entries are not picked up* so any transactions that are returned are usually misallocated. Quickly finding and reallocating these can save hours of work reconciling the Wages Payable and Superannuation Payable accounts.
- *Xero Issues* - keep the [Xero Status page](#) in your favourites list. If you are having any issues with Xero functionality, you should check there first to see if there are any known problems. This will save you from submitting a support query unnecessarily.
- *View Multiple Pages* - Sometimes you need to view different reports or pages at the same time. You can do this by opening each page or report in separate tabs. Do this by right-clicking the "Dashboard" tab and selecting "Open in new tab".
- *Prepayments* - Rather than trying to remember to enter a monthly journal to take up expense payments for prepaid assets or liabilities, use repeating journals to release the prepayments. This will keep your management accounts current. One less thing to do!
- *Notes* - All sales invoices, bills and contact cards have an area where you can add notes about a transaction or contact. This is best practice in terms of record keeping. Making notes will also assist you or your advisor to understand or remember why an action was taken when accounts are reviewed in the future.
- *Annotations* - Related to the above tip about notes, you can also make annotations to your reports which will assist others in understanding what has happened during a specific period or a transaction. To add annotations,

simply click on the "add note" icon next to a cell and start typing. Find out [how to use annotations here](#).

So there you have it, my list of useful Xero tips. I hope some of them assist you at some point. Until next week, happy bookkeeping!

Latest Articles



ATO Has Recommended Tax & Super Debt Collection Activities...

During the past 2 years of the COVID-19 pandemic, the ATO deliberately halted tax and super debt collection in order to assist businesses and taxpayers affected by the pandemic's consequences. But now they are back on the bandwagon. Debt collection has recommenced!



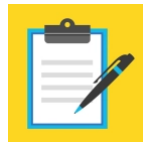
Can I Claim the GST on That?

This is a list of common business purchases and whether or not each one includes GST or not. Bookmark it now to make your bookkeeping and BAS prep easier!



New Paid Family & Domestic Violence Leave

Employees (full-time, part-time, and casual), will soon be able to access 10 days of paid family and domestic violence leave in a 12-month period. This will replace the current 5 days of unpaid leave available to affected employees.



A Better Employee Onboarding Experience is Coming...

The way new employees are onboarded is changing.

[Enter the "New Employment Form"](#)

This is an all-in-one onboarding form that new employees access from their myGov accounts.

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