



Get the best out of Xero

Top takeaways from these sessions

1. Utilising Xero's automation tools is a great way to help your clients get time back to focus on running their business

- ✓ Using the [chart of accounts templates](#) in Xero HQ creates a more streamlined process for you to add a chart of accounts to a client's new Xero organisation.
- ✓ Using data capture software such as [Hubdoc](#) allows you to email, take a photo on your mobile or scan your receipts and documents into Xero saving businesses time manually keying in information.
- ✓ [Cash coding](#) in Xero is a fast and easy way to reconcile multiple statement lines relating to cash transactions in one go.

2. Using Xero's reporting tools allows you to provide deeper insight to your clients and helps them feel more in control of their cash flow

- ✓ Xero's new report templates allow you to gain further insight through the use of tracking categories, common formats, short-term cash flow management, and variance analysis.
- ✓ [Xero Analytics Plus](#) uses AI-powered cash flow predictions allowing businesses to see and plan up to 90 days in the future making it easier to plan ahead.

3. All the support you need is on Xero Central

- ✓ Most common questions are proactively answered through support articles so you don't need to spend time waiting for someone to answer your question.
- ✓ If you're not able to find what you're looking for on Xero Central, there is also the option to request a call back.

Key things to do back at the office

- 1 Check out the [Industry Performance Report](#) to discover key trends shaping the accounting industry and benchmark your firm's performance to discover how to drive growth and embrace practice efficiency.
- 2 Sign up to the [Xero Analytics Plus course](#) to find out how this tool can help your clients manage short-term cash flow better and understand key metrics.
- 3 Browse the [Xero Partner Toolkit](#) to find resources to help make it easier for you to onboard clients onto Xero, market your practice and help your clients feel in control of their cash flow.