![Xero Xerocon Sydney 2023 logo]

Top tips to *boost* efficiency in your practice

Client reporting in Xero HQ

Tip 1

Copy your existing report templates to create industry specific reports. For more information, see the help article on creating new report templates.

Tip 2

Use report fields for your clients' non-financial data, such as names of directors or trustees, to quickly populate this information in the non-financial data reports like Trust Distribution Minutes, Family Trust Elections, Minutes of Meeting of Directors, and Management reports. For more information, see the help article on setting up client and practice report fields.

Bonus tip: regularly review your clients' reports codes. For more information, see the help article on how to map or review your clients report codes.

Tax and compliance in Xero Tax

Tip 1

Use filters to customise your tax returns' view to better manage your workflows and understand what returns need to be prepared or reviewed (depending on your role).

1. Tax > Returns
2. Select the All Returns dropdown > New Filter

Tip 2

Create custom fields to track all information about your client in one place, even if these aren't standard fields in the system, such as FBT, TPAR and Super obligations. For more information, see the help article on creating custom fields.

Job management and practice reporting in Xero Practice Manager

Tip 1

Use filters and custom columns to easily view and manage your jobs, or jobs in your team. For more information, see the help article on filtering and customising your job listing.

Tip 2

Create custom reports easily and quickly using a sample report as your base. For more information, see the help article on running & editing sample reports.

Bonus tip: use / (forward slash) on your keyboard in any screen within Practice Manager to open global search.

Bonus tip: Filter your work in progress dashboard to show completed jobs with un-invoiced amounts to ensure all billable hours are invoiced. For more information, see the help article on filtering your work in progress dashboard.

Collecting client digital signatures with Xero Sign

Tip 1

Send out bulk reminders to your clients for digital signatures on document packs and other information you're still waiting on. For more information, see the help article on sending document pack reminders to clients.

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