



## Master reporting and insights in Xero

### Top takeaways from this session

#### 1. Start carrying out regular data health checks

Make sure your clients' data reflects their business objectives by ensuring the data makes sense, is up to date and of sufficient quality.

- Trust the data you are using to advise your clients
- Get more insights into their business performance
- Have deeper conversations with your clients to help them make better decisions

#### 2. Spend time in the Xero demo company

- To access the demo company, head to **My Xero** and select **Try the Demo Company** at the bottom of the page. You can reset it and change the country or edition at the bottom of the page. For more information, see the help article on [using the demo company](#).
- Try out the different reports and tools we've covered in this session, including the [Reconciliation Report pack](#) and the [General Ledger Exceptions report](#).
- Check out [business snapshot](#) and [short-term cash flow](#) in Xero Analytics Plus, which can now predict recurring bills and invoices.
- Explore the [Report centre](#) and find a new favourite report.
- Practice [customisation](#) so you can provide reports tailored to your clients needs. For example, reorder, remove or add additional reports to a report pack, and use common format reports. Save as a [Custom report](#), so you don't need to carry out the same customisation again.

#### 3. Tidy up report codes and templates

To save time running reports:

- Make sure [report codes](#) are mapped (Top tip!)
- Set up some [report templates](#) in Xero HQ to use across all of your clients

### Resources, books, blogs

- To understand more about the current economic conditions and insights around cash flow, check out our [money matters report](#). This can help inform and guide your conversations with clients.