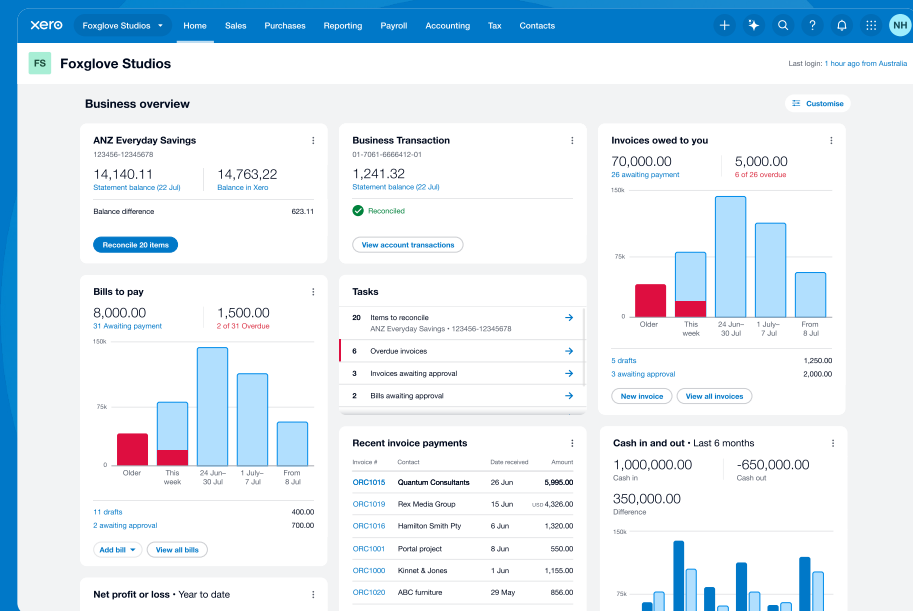




Your guide to Xero's **reimagined** homepage

Introducing Xero's new homepage (previously the dashboard), reimagined to show you business performance at a glance, and help you take action quickly.



Contents



3 What's changed?

4 New widgets

- 4 Stay on top of to-dos with the Tasks widget
 - 5 Know who has paid you at a glance
 - 6 See net profit or loss at a glance
 - 7 Simplified tax visibility by region
-

8 Upgraded widgets

- 8 Manage expenses in one place
 - 9 Add bills quickly from the homepage
 - 10 Catch bank mismatches early
 - 11 Stay on top of unpaid invoices
 - 12 See cash flow insights at a glance
 - 13 Monitor your accounting with ease
-

14 Improved usability

- 14 Customise your homepage your way
 - 15 Scan the page faster with optimised layouts
 - 16 Responsive design
-

17 More connected

- 17 Ecosystem at your fingertips

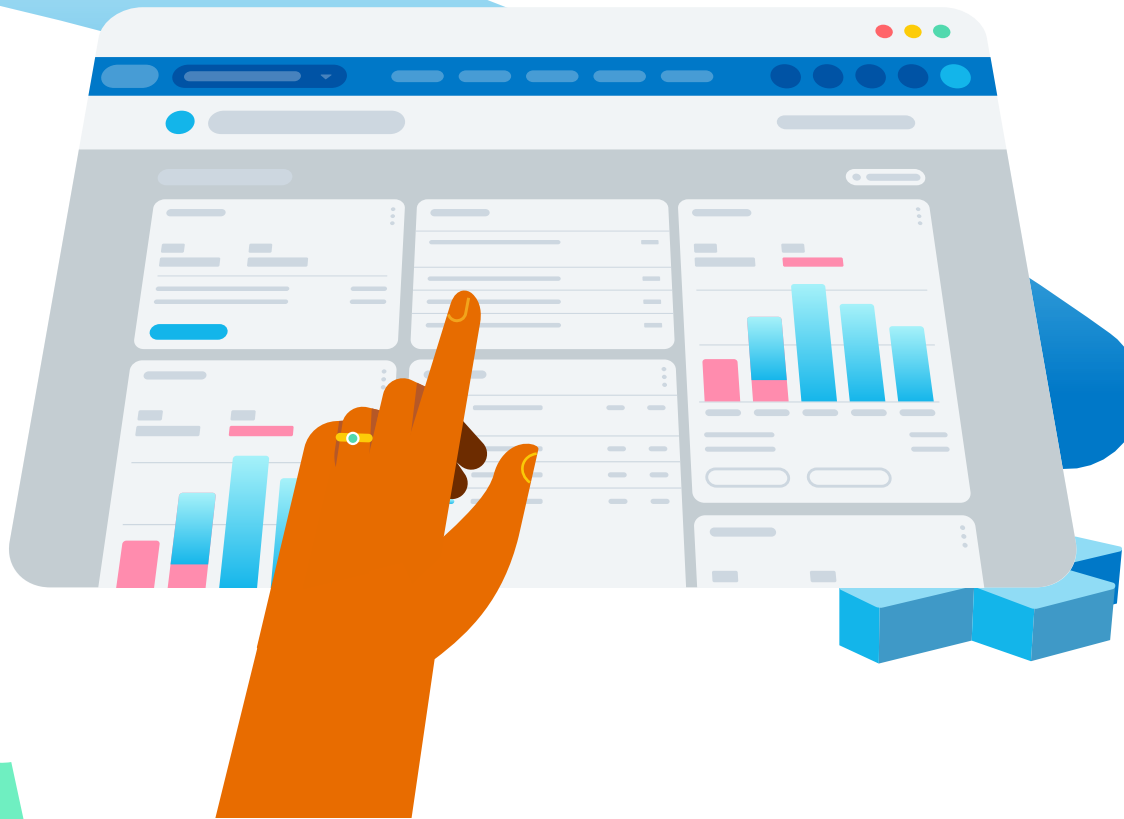
What's changed?

The new Xero homepage (previously the dashboard), has been reimagined to give you a more intuitive and insight-rich experience.

It brings together the insights that matter most to your business with new and uplifted widgets, surfacing more data and trends, like recently paid invoices, historical cash flow, P&L summaries, and spending by category to help you view performance at a glance and take action faster.

You'll still land here when you log into Xero, but now with more control and clarity.

[Click here to view the video](#)



Stay on top of your to-dos with the Tasks widget

A new **Tasks** widget lists jobs that need attention - like unreconciled bank transactions, overdue invoices or bills awaiting approval - so nothing falls through the cracks.

Tasks		
20	Items to reconcile ANZ Everyday Savings • 123456-12345678	→
6	Overdue invoices	→
3	Invoices awaiting approval	→
2	Bills awaiting approval	→

Know who paid you at a glance

The new **Recent Invoice Payments** widget gives you a clear snapshot of recent invoice payments directly on the homepage, giving you confidence in your cash flow with no digging required.

Recent invoice payments

Invoice #	Contact	Date received	Amount
ORC1015	Quantum Consultants	26 Jun	5,995.00
ORC1019	Rex Media Group	15 Jun	USD 4,326.00
ORC1016	Hamilton Smith Pty	6 Jun	1,320.00
ORC1001	Portal project	8 Jun	550.00
ORC1000	Kinnet & Jones	1 Jun	1,155.00
ORC1020	ABC furniture	29 May	856.00
ORC1008	Arabica Cafe	27 May	2,430.00
ORC1012	Kinnet & Jones	27 May	1,340.00
ORC1006	Alpha Pharma	24 May	1,776.00

[View paid invoices](#)

Manage invoice reminders

Manage online payments

About Recent invoice payments



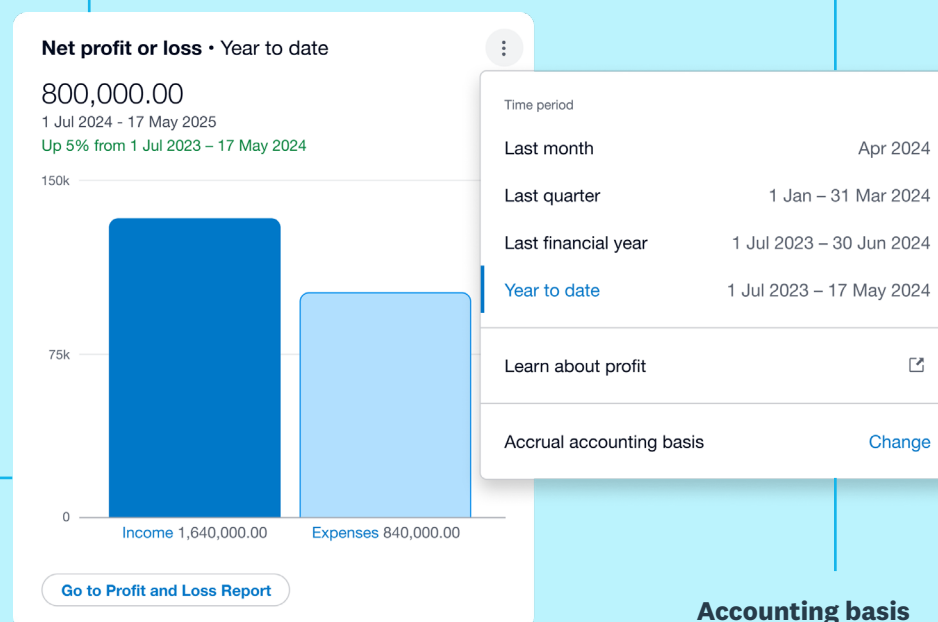
See net profit or loss at a glance

The new **Net Profit or Loss** widget shows a visual breakdown of income vs expenses. Customise the timeframe (month, quarter, YTD) and drill into the Profit and Loss report for more detail.

Visually compare income vs expenses

Profit summary and trends
To monitor business performance

Customisation
Users can select from different date ranges



Accounting basis
Users can see their profit using their preferred accounting basis from the Reporting references page

Simplified tax visibility

Stay compliant with regional tax widgets (for example, AU BAS, US sales tax, UK VAT). Track activity statements, view upcoming obligations, and manage taxes more efficiently from your homepage.

Note: More region-specific tax widgets are rolling out over the next 12 months.

Tip: The old tax & reporting widget has been removed from the homepage. You can still access reporting links from the Reporting tab in navigation.



UK

VAT Return

20 days

Until VAT return due (7 May 2021)

For 1 Jan – 31 Mar, 2021

Payment overdue by 40 days (7 May 2021)

£100.00

[Go to VAT Returns](#)


Re-check VAT status

Overdue payment highlighted



US

Sales tax

Due Jun 20

California, May 1 – 31, 2025

New York, Jun 1 – 31, 2025

Due Jul 20

California, Jul 1 – 31, 2025

Due Aug 20

[View sales tax](#)


AUS

Activity statements

Due 28 Sep

Aug 2024

Sep 2024

Due 28 Oct

[View activity statements](#)

Manage expenses in one place

The uplifted **Expenses to Review** and **Your Expenses** widgets offer full visibility of what's been submitted, approved, reimbursed, or needs your review - both your own and your employees' claims.

Expenses to review • Last 365 days

55,070.28
96 to review

77,796.04
84 to pay

Learn about Expenses

Header	Expenses to review	Amount
JV Jai Vishal	16	50,176.56
SZ Samuel Zanokuhle	12	3,505.28
SS Stella Svenja	20	12,422.68
DC Dylan Cooper	8	4,942.24
DW Elisa Mendez	16	18,272.92
SR Stephanie Roberts	8	3,157.80
+ 4 others	4	652.45

View all expenses

Your expenses

120.80
7 drafts

5,091.41
5 awaiting approval

4 declined
3 to be paid

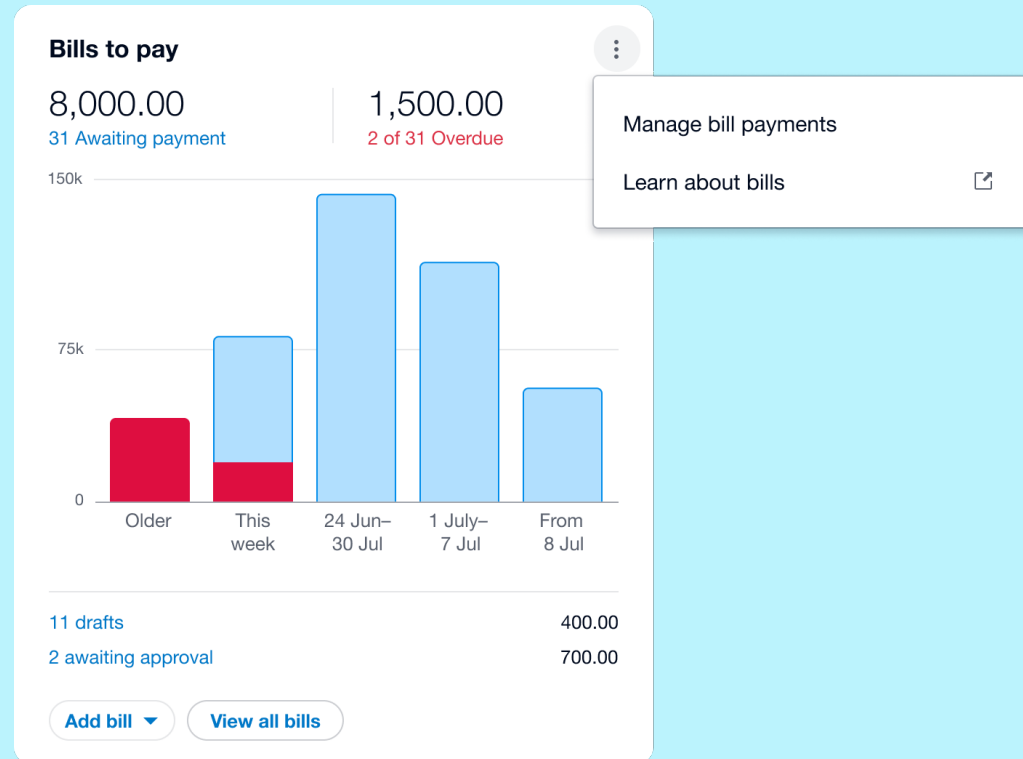
1,425.84
734.78

Create new expense

Add bills quickly from your homepage

The updated **Bills to Pay** widget not only shows what's overdue, but also lets you upload bills or finalise drafts directly from the homepage, saving time on data entry.

Note: Bill counts may differ slightly from the Bills List view as prepayments are not included.



Catch bank mismatches early

The improved **Bank Account** widget now clearly flags balance mismatches between your bank feed and Xero, helping you reconcile faster and more accurately.

You can still view the graph on the Bank Accounts page and see broader trends with the **Cash In and Out** widget.

Note: You choose which bank accounts appear on your homepage (up to 50). Add or remove accounts via Customise, or from the banner that appears when a new account is created.

Reconciliation

#1 focus

Primary job is highlighting items to reconcile and ensuring bank rec up to date/accurate

Green tick to indicate when all transactions are reconciled

ANZ Everyday Savings

ABC BANK

123456-12345678

14,140.11

Statement balance (22 Jul)

14,763.22

Balance in Xero

Balance difference

623.11

Reconcile 20 items

Highlighting balance mismatch: a new value add

Business Transaction

ABC BANK

01-7061-6666412-01

1,241.32

Statement balance (22 Jul)



Reconciled

View account transactions

Stay on top of unpaid invoices

The upgraded **Invoices Owed to You** widget highlights invoices awaiting payment, and those that are overdue, and lets you take action directly from your homepage.

Note: Totals may look different compared to the old dashboard or the Invoice list view. This is because prepayments are no longer included in the count, so you now get a clearer picture of invoices still awaiting payment.

Clearer hierarchy:

Prioritising “Awaiting Payment” and “Overdue” as these benefit from action

Clarifying overdue is a subset of awaiting payment

New Y axis:

helps users to estimate values presented in the graph

Adding colour:

Overdue is the most important information to highlight



Manage invoice reminders

Manage online payments

Learn about invoices

Get paid faster

New overflow menu

provides quick access to strategically important invoicing features that drive payments

See cash flow insights at a glance

The **Cash In and Out** widget shows a snapshot of historical cash flow over the last six months, and now highlights total cash in, cash out and the difference over six months. Hover over the chart to see the numbers in more detail.



Cash in, cash out and difference summary for the last 6 months surfaced so users can monitor at a glance

Monitor your accounting with ease

The **Chart of Accounts Watchlist** has been enhanced to show tracking against budgets, with monthly and year-to-date balances directly on the homepage. This gives you a better view of actual performance versus plan, helping you track spending, spot overspending early, and stay aligned with your budgets - without needing to run separate reports.

Note: The figures here use your organisation's accounting basis, as set in Reporting preferences. Advisors can update this setting, but note that it applies to all your reports across Xero.

Chart of accounts watchlist

Code	Account	Budget	This month	
200	Sales	30,000.00	42,000.00	1,624,940
260	Other revenue	1,000.00	1,500.00	15,000
270	Interest income	5.00	5.50	60
300	Purchases	75,000.00	30,090.00	361,080
412	Consulting & Accounting	400.00	400.00	4,800
416	Depreciation	1,200.00	1,100.00	13,200.00
453	Office expenses	450.00	400.00	4,800.00
510	Bank fees	10.00	10.00	120.00
512	Inventory	40,000.00	38,000.00	456,000.00

[Go to full chart of accounts](#)



Edit accounts watchlist

Edit budgets

☒ Show budgets

Accrual accounting basis

[Change](#)

Customise your homepage your way

Tailor your view with drag-and-drop layout options. You can now show, hide, and reorder widgets, so your most important tasks and insights are always front and centre

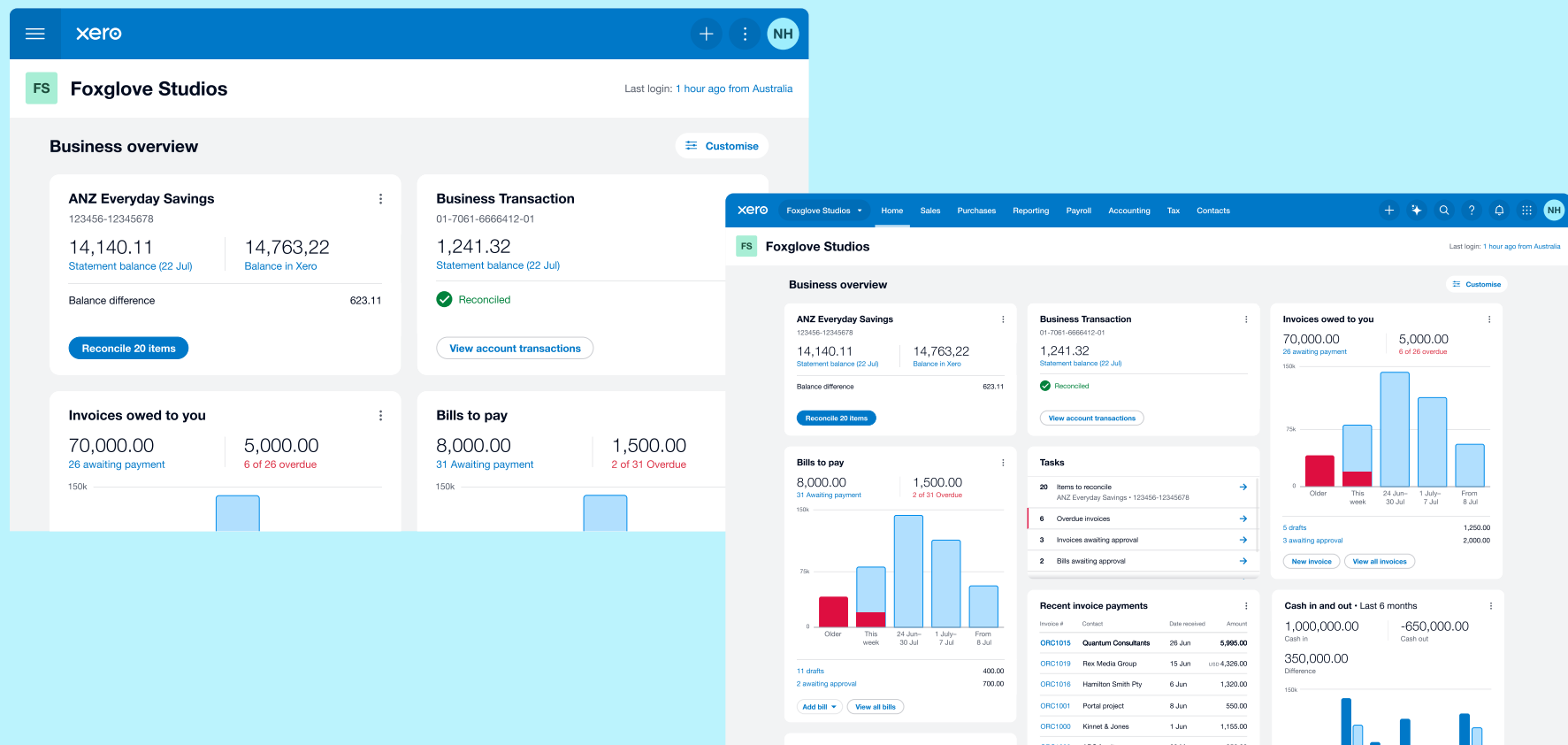
Did you know? Your homepage setup is unique to you; it won't change how others in your organisation see theirs. Bookkeepers and accountants can customise their own view per organisation.

The screenshot displays the Xero homepage for 'Hornblower Enterprises'. The top navigation bar includes links for Home, Sales, Purchases, Reporting, Payroll, Accounting, Tax, Contacts, and Projects. The main dashboard is titled 'Business overview' and features a 'How it works' section with instructions on customising the layout. Below this, there are several widgets: 'Everyday Savings' showing a balance of 14,763.22 and a statement balance of 14,140.11; 'Petty cash' showing a balance of 976.25 and a reconciled status; 'Tasks' listing items to reconcile, overdue invoices, and bills; 'Cash in and out' showing a difference of 350,000.00; 'Invoices owed to you' showing a balance of 82,010 and 12,200; and 'Bills to pay' showing a balance of 82,010 and 12,200. A sidebar on the right, titled 'Show and hide widgets', allows users to toggle the visibility of various widgets, including 'Bank accounts', 'Recent invoice payments', 'Bills to pay', 'Tasks', 'Invoices owed to you', 'Money in and out', 'Profit and loss', and 'Chart of accounts watchlist'. The sidebar also includes a 'Done' button at the bottom.

Scan the page faster with optimised layouts

The new homepage has been redesigned to be easier to scan and find key information, so you can spot what matters at a glance.

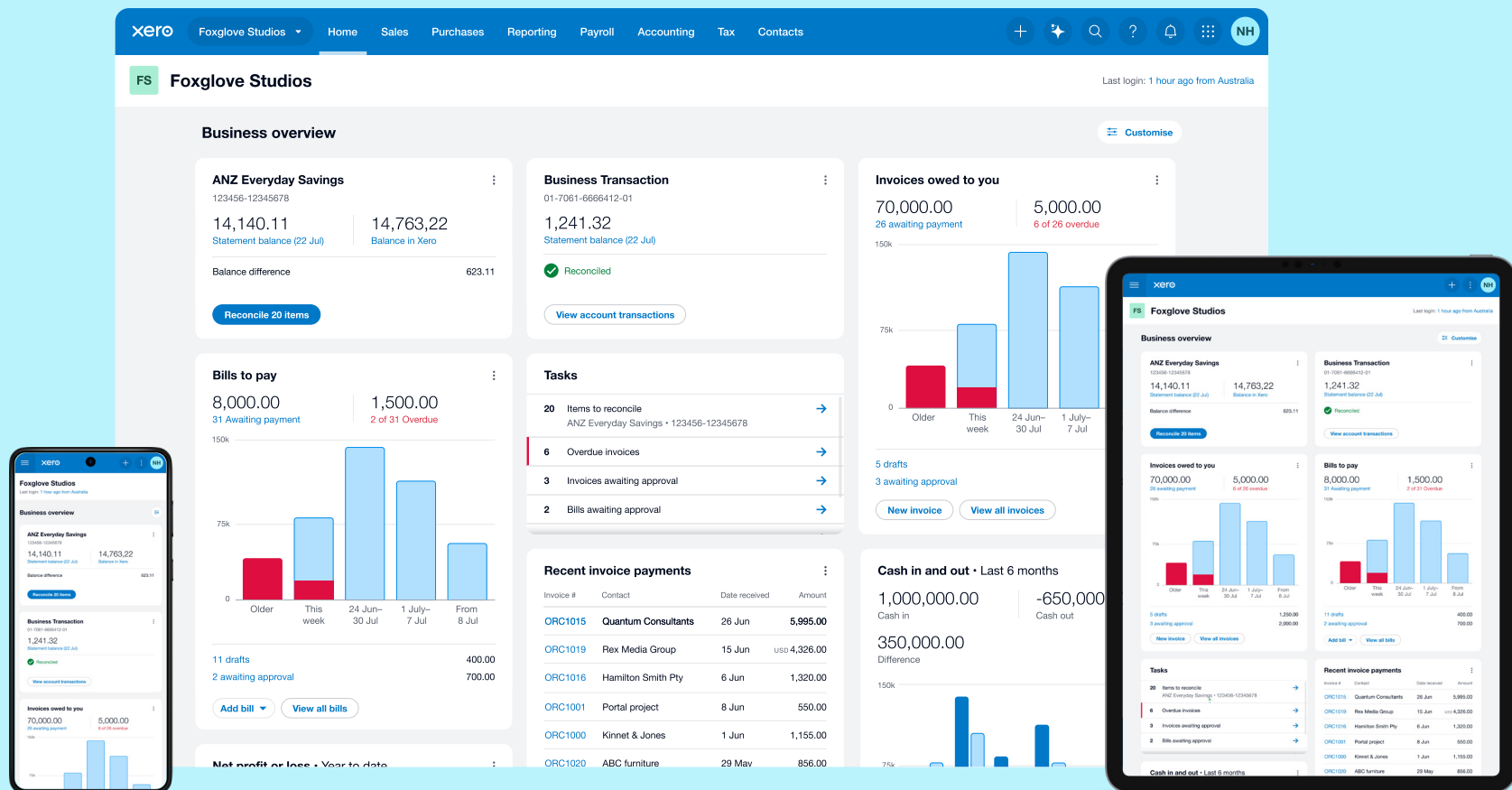
Note: Depending on your screen size, the number of columns will adjust automatically (from four down to one). Your layout preferences can be saved for each screen size, so your homepage will look the same when you return.



Seamless across all devices

The homepage is fully responsive, adjusting automatically to different screen sizes and device types, so whether you're on desktop or mobile, you get the best experience.

Tip: If your homepage feels too busy, use the Customise button to hide widgets you don't need. More widget size options will be added over time for even greater flexibility.



Ecosystem at your fingertips

The new Recommended Apps zone suggests tools tailored to your needs and offers seamless access to connected apps, helping you extend Xero's power with just a click.

Apps that connect with Xero [Explore more apps](#)

[Hide](#)



Stripe
Payments
★★★★☆ 276 reviews

Stripe makes it easy to accept payments for online invoices sent from Xero



Hubspot
CRM
★★★★☆ 95 reviews

Xero and HubSpot integrate together for end-to-end visibility into your customers' journey.



Shopify
Ecommerce
★★★★☆ 95 reviews

Easy management of your e-commerce business finances



Insightly
Payments
★★★★☆ 124 reviews

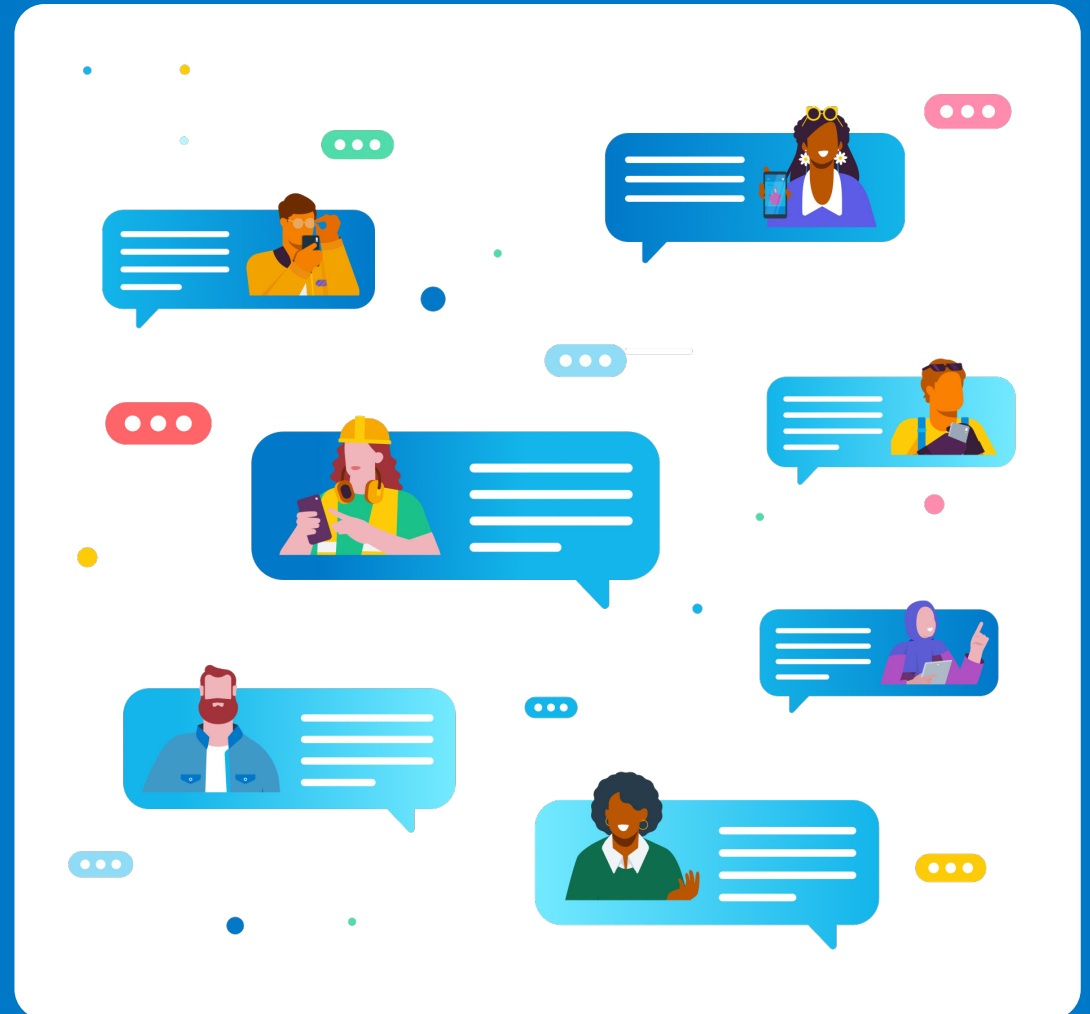
Insightly empowers companies to build lasting relationships with their customers



Built for you, **with you**

The new homepage was shaped by feedback from over **33,000** small businesses and advisors. Everything from layout to language to widget features was informed by what you told us you needed.

We continue to listen – and the homepage will keep evolving to help you get even more value from Xero.





your business
supercharged