

General Practice - Finance Matters

February 2021

Xero - Functionality and Training

Accounting software with all the time-saving tools to help you grow your practice. The benefits of Xero include :

- Access your Xero account [by smartphone, Mac, PC or tablet] from anywhere with internet coverage to see your latest financial position
- Easy to share your financial information with us [Armstrong Watson LLP] and your bookkeeper, if relevant
- Tailor your dashboard to include practice metrics that will assist you in measuring performance and managing your day to day practice affairs
- We will import a bespoke medical 'chart of accounts' to facilitate easy mapping of actual transactions to your Xero account nominal ledger
- Direct bank feeds reduce manual input and facilitate swift bank reconciliations
- Sales invoices are easy to raise [with your personal practice details and logo] and are easy to monitor/track to receipt of payment
- Supplier invoices can be tracked to ensure payment terms are adhered to
- Related information can be stored in the same place to enhance understanding
- Upgrades to Xero software usually occur at night to minimise disruption, with no routine additional costs to the end user

- Access to the BDO Open Exeter App to download your monthly NHS statements directly into your Xero account
- Bespoke tailored training packages [and ongoing support] available to all our clients.

For more information please contact your Armstrong Watson representative:



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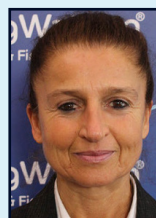
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Xero Training Agenda

- Introductions
- Xero Access Rights
 - Business Advisor
 - Standard Access
 - Read only Access
- Xero Set up
 - Dashboard
 - Chart of accounts
 - Tracking
- Bank
 - Bank Feed
 - Bank Reconciliation
 - Matching – partial / full payment
 - Bank Rules
- Settings
 - Tracking Invoice settings
 - Payment Services
 - Stock
- Information storage
 - Supplier invoices
 - Purchase orders
 - Sales invoices
- BDO Open Exeter App
- Bespoke Add Ons
 - Datamolino
 - Receipt Bank
- Questions
- A.O.B.



Beautiful accounting software



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...we're with you.

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